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Genesys Knowledge Center Deployment Guide

Installing the Knowledge Center CMS

12/20/2025

Installing the Knowledge Center CMS

Important

You need to configure the CMS options that are stored in the "cms:general" section of the Application Cluster object. (See [Configuration Options](#))

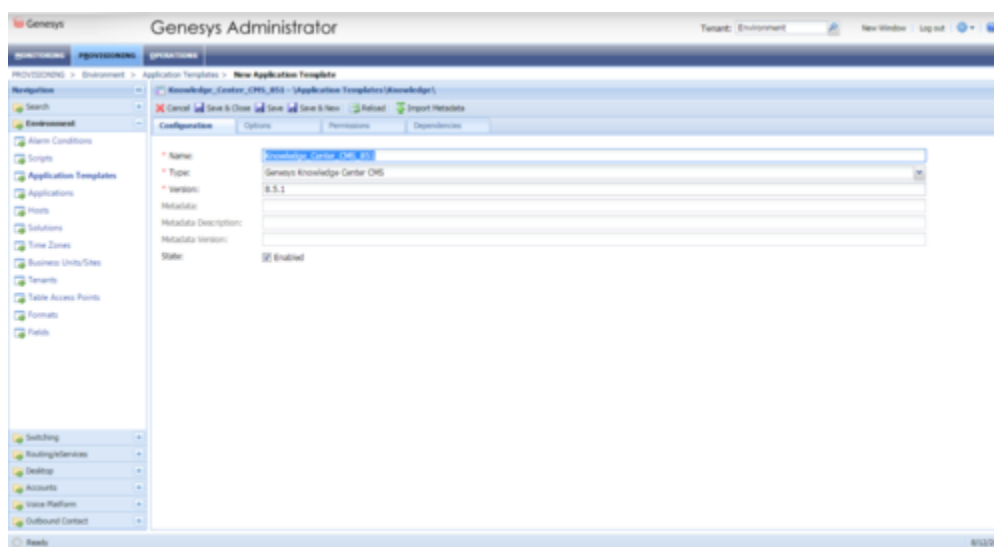
If you would like to use several instances of the CMS, you need to configure the CMS Cluster. (See [Configuring CMS Cluster](#))

Install the CMS

Import the CMS Application Template

Start

1. Open Genesys Administrator and navigate to **Provisioning > Environment > Application Templates**.
2. In the **Tasks** panel, click **Upload Template**.
3. In the **Click 'Add' and choose application template (APD) file to import** window, click **Add**.
4. Browse to the *Knowledge_Center_CMS_851.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.



The Knowledge Center CMS Application Template

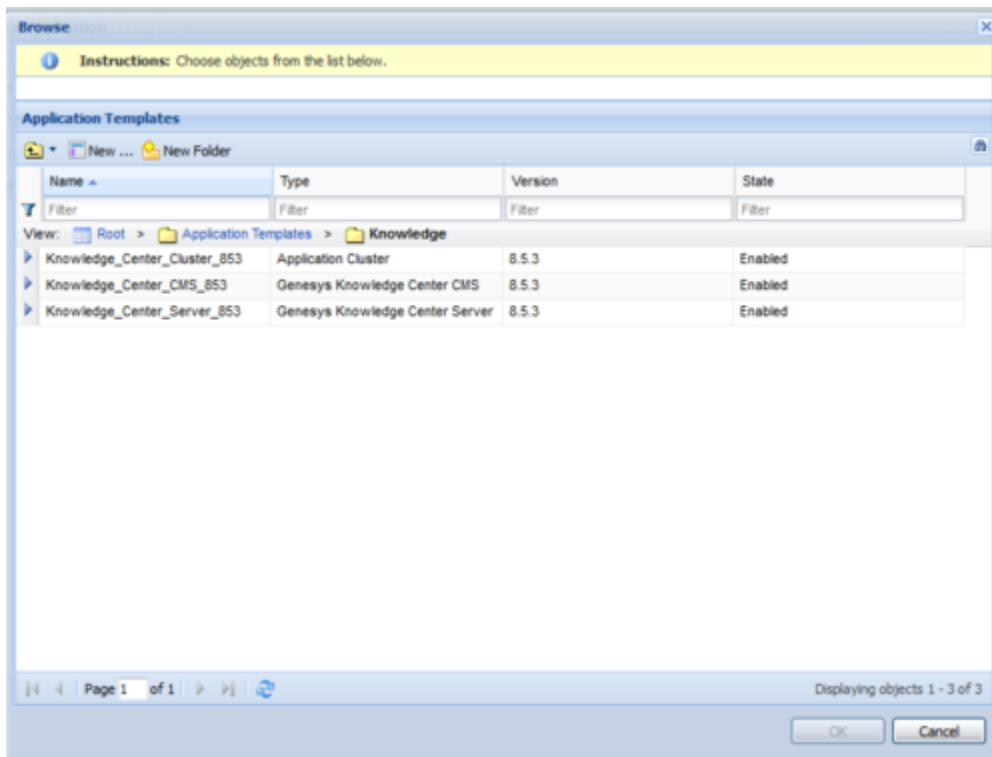
5. Click **Save and Close**.

End

Create CMS Applications

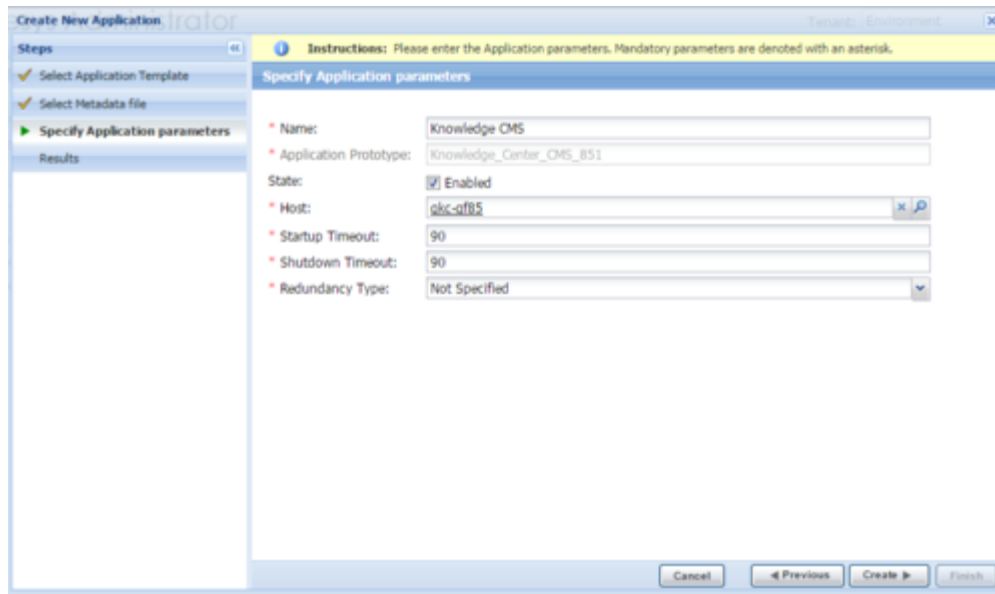
Start

1. Open Genesys Administrator and navigate to **Provisioning > Environment > Applications**.
2. In the **Tasks** panel, click **Create New Application**.
3. In the **Select Application Template** panel, click **Browse for Template** and select the Genesys Knowledge Center Server application template that you imported earlier. Click **OK**.



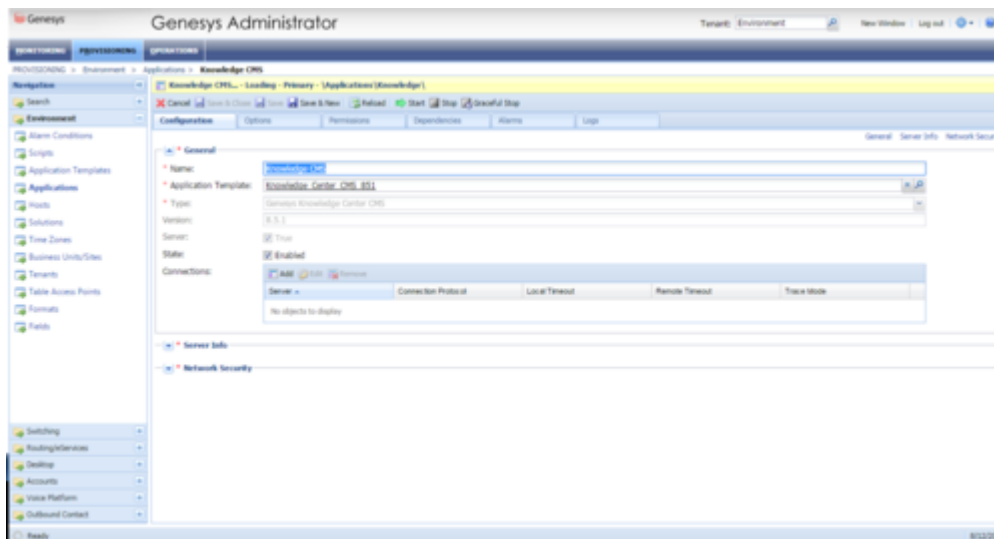
Selecting the Knowledge Center CMS Template

4. The template is added to the **Select Application Template** panel. Click **Next**.
5. In the **Select Metadata** file panel, click **Browse** and select the *Knowledge_Center_CMS_851.xml* file. Click **Open**.
6. The metadata file is added to the **Select Metadata** file panel. Click **Next**.
7. In **Specify the appropriate application parameters**:
 1. Enter a name for your application. For instance, *Knowledge Center CMS*.
 2. Enable the **State**.
 3. Select the Host on which the CMS will reside.
 4. Click **Create**.



Creating the Knowledge Center CMS Application

8. The **Results** panel opens.
9. Enable **Opens the Application details form after clicking 'Finish'** and click **Finish**. The Knowledge Center CMS application form opens and you can start configuring the CMS application.



Configuring the Knowledge Center CMS

End

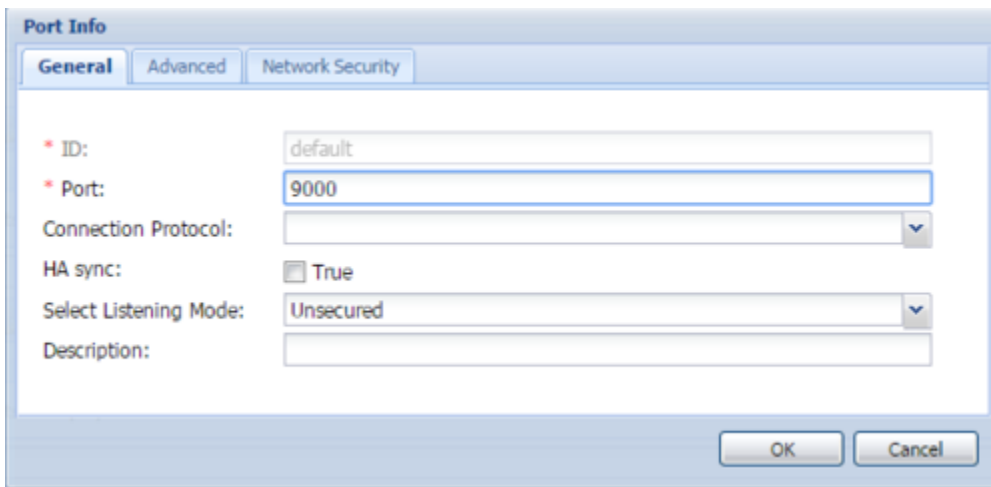
Configure the CMS Application

Start

1. If your Knowledge Center CMS application form is not open in Genesys Administrator, navigate to
-

Provisioning > Environment > Applications. Select the application defined for the Knowledge Center CMS and click **Edit...**

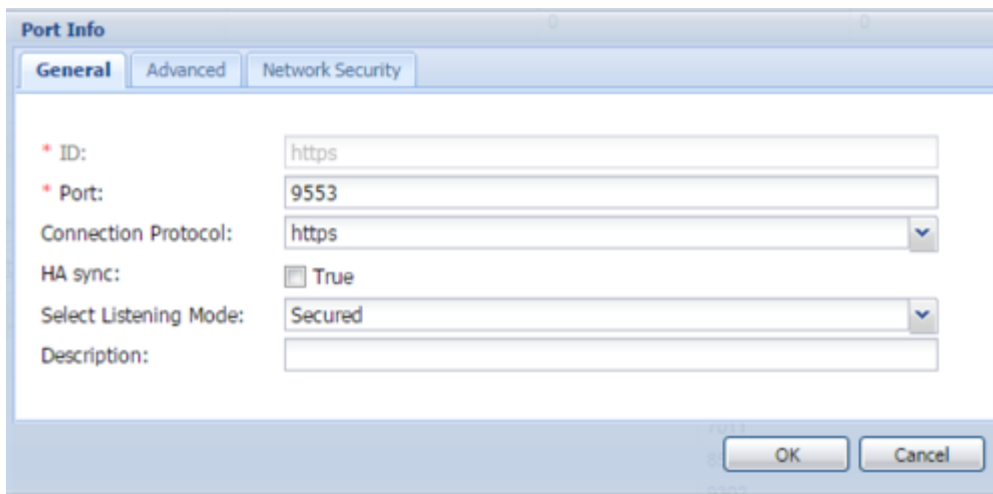
2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens.
3. Select the Knowledge Center Cluster application, then click **OK**.
4. Expand the **Server Info** pane.
5. If your Host is not defined, click the lookup icon to browse to the hostname of your application.
6. In the **Listening Ports** section, create the default port by clicking **Add**. The **Port Info** dialog opens.
 1. Enter the **Port**. For instance, 9000.
 2. Click **OK**. The port with the default identifier appears in the list of **Listening ports**.



The screenshot shows the 'Port Info' dialog box with the 'General' tab active. The 'ID' field contains 'default'. The 'Port' field contains '9000'. The 'Connection Protocol' is a dropdown menu. The 'HA sync' checkbox is checked, with the label 'True' next to it. The 'Select Listening Mode' is a dropdown menu showing 'Unsecured'. The 'Description' field is empty. At the bottom right are 'OK' and 'Cancel' buttons.

Knowledge Center CMS Port Information

7. Optionally, you can add a secure listening port for authenticated users, secured connections, and secure chat. Click **Add**. The **Port Info** dialog opens.
 1. Enter *https* for the **ID** field.
 2. Enter the port . For instance, 9553.
 3. Enter *https* for the **Connection Protocol**.
 4. Choose **Secured** for the **Listening Mode**.
 5. Click **OK**.



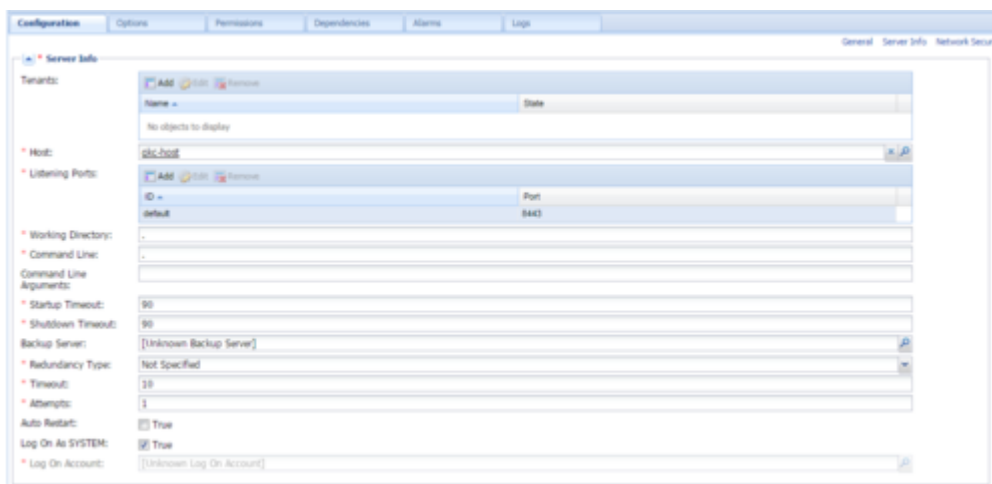
The 'Port Info' dialog box is shown with the 'General' tab selected. The fields are as follows:

Field	Value
ID	https
Port	9553
Connection Protocol	https
HA sync	<input checked="" type="checkbox"/> True
Select Listening Mode	Secured
Description	

Buttons: OK, Cancel

GKS CMS https port

8. Ensure the **Working Directory** and **Command Line** fields contain "." (period).



The 'Configuration' window is shown with the 'Server Info' tab selected. The fields are as follows:

Field	Value
Tenants	None
Host	gks-host
Listening Ports	default (9443)
Working Directory	.
Command Line	.
Startup Timeout	90
Shutdown Timeout	90
Backup Server	[Unknown Backup Server]
Redundancy Type	Not Specified
Timeout	10
Attempts	1
Auto Restart	<input checked="" type="checkbox"/> True
Log On As SYSTEM	<input checked="" type="checkbox"/> True
Log On Account	[Unknown Log On Account]

Knowledge Center CMS Information

9. In the **Tenants** section, add a working tenant by clicking **Add**. Browse and choose the appropriate tenant in the pop-up dialog. Click **OK**.
10. Uncheck **Log On As SYSTEM**.
11. In **Log On Account** specify the user account that:
 - has the ability to view access groups (this is required if you use access groups to set privileges for your agents)
 - has **Knowledge.ADMINISTER** privileges and belongs to a Super Administrators access group (required for exporting configuration definitions)
 - has **Knowledge.AUTHOR** privilege (required for **scheduled synchronization**)
- Click **Save**.

- The **Confirmation** dialog for changing the application's port opens. Click **Yes**.

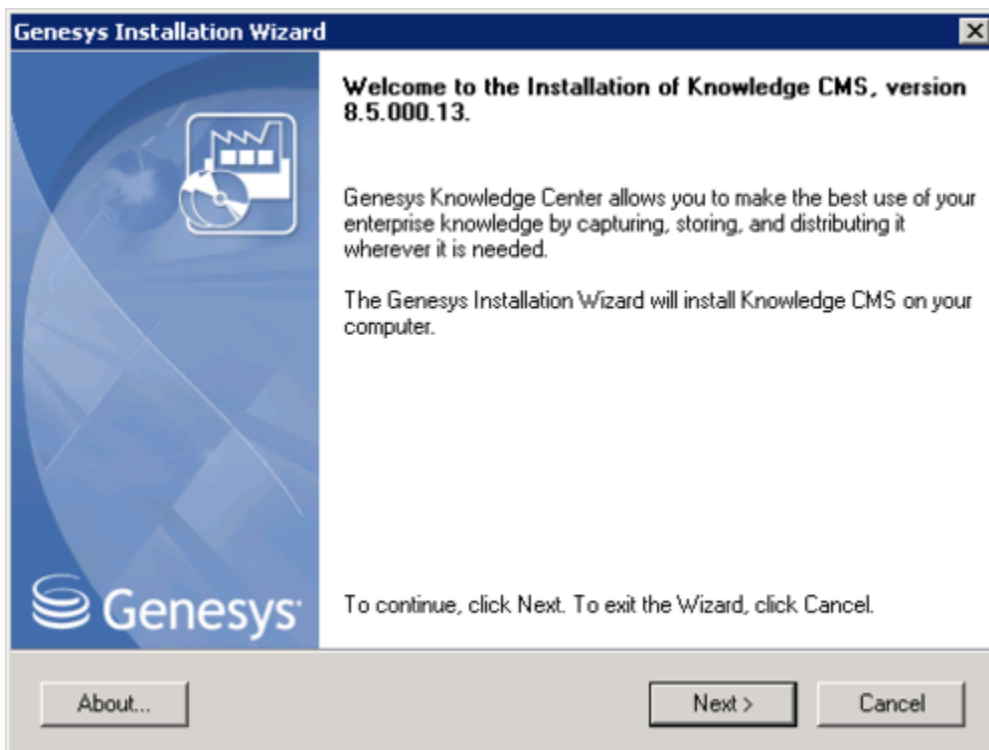
End

Installing the CMS

Windows Installation Procedure

Start

1. In your installation package, locate and double-click the *setup.exe* file. The Install Shield opens the welcome screen.



Knowledge Center CMS installation Window

2. Click **Next**. The **Connection Parameters to the Configuration Server** screen appears.

Genesys Installation Wizard

Connection Parameters to the Configuration Server

The parameters in the Host and User fields are required to establish a connection to Configuration Server.

Host

Specify the host name and port number for the machine on which Configuration Server is running.

Host name: localhost

Port: 2020

User

Specify your Configuration Server user name and password.

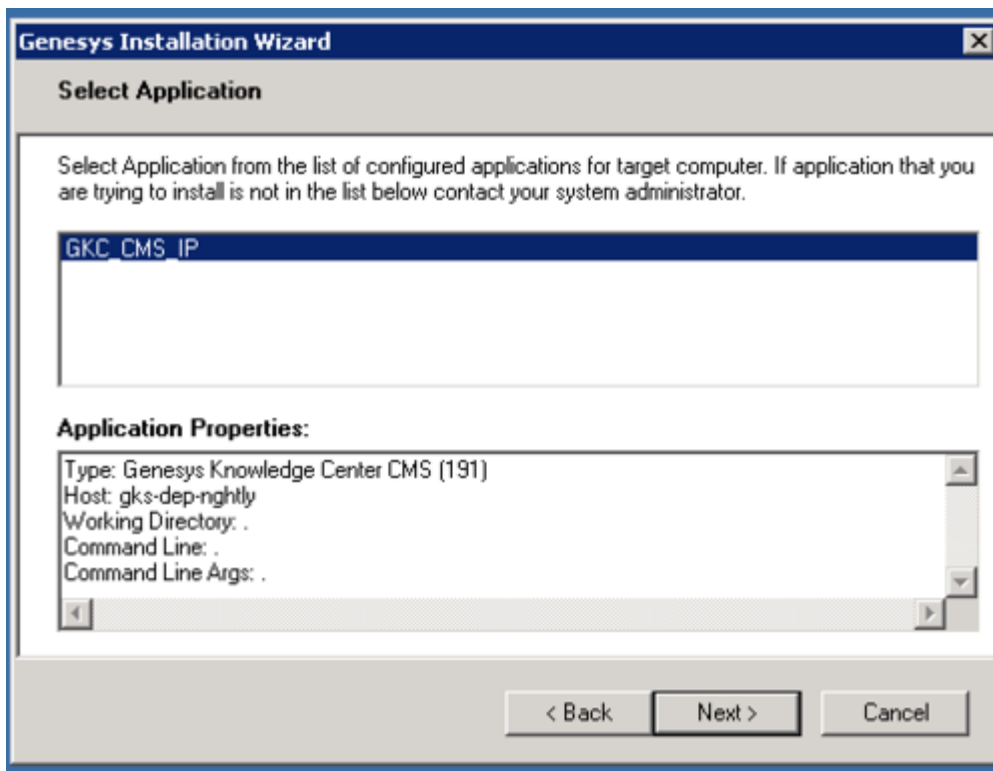
User name: default

Password: [masked]

< Back Next > Cancel

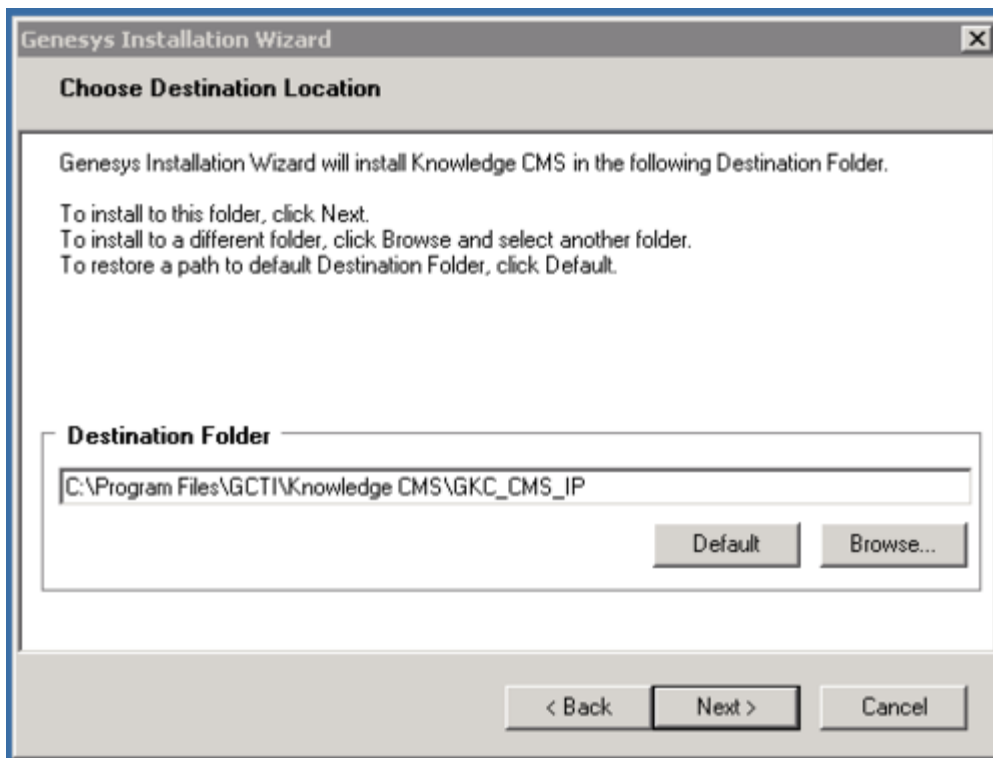
Knowledge Center CMS Connection Parameters

3. Under **Host**, specify the host name and port number where Configuration Server is running. (This is the main listening port entered in the **Server Info** tab for Configuration Server.)
4. Under **User**, enter the user name and password for logging in to Configuration Server.
5. Click **Next**. The **Select Application** screen appears.
6. Select the Knowledge Center CMS that you are installing. The **Application Properties** area shows the **Type**, **Host**, **Working Directory**, **Command Line executable**, and **Command Line Arguments** information previously entered in the **Server Info** and **Start Info** tabs of the selected application object.



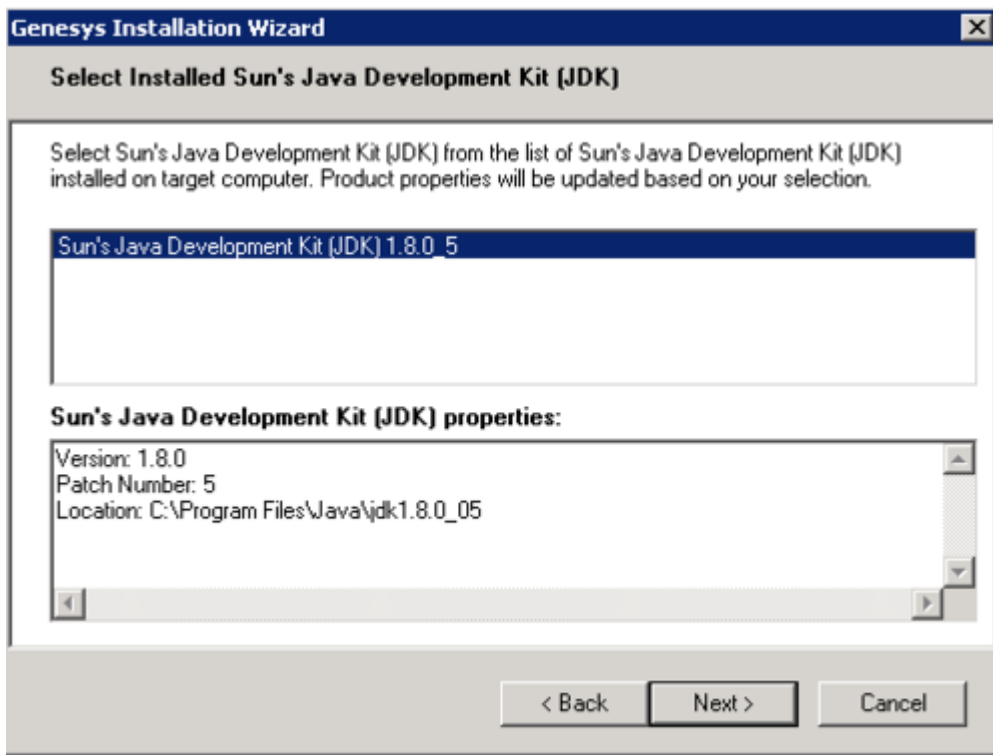
Selecting the Knowledge Center CMS Application

7. Click **Next**. The **Choose Destination Location** screen appears.
8. Under **Destination Folder**, keep the default value or browse for the desired installation location.



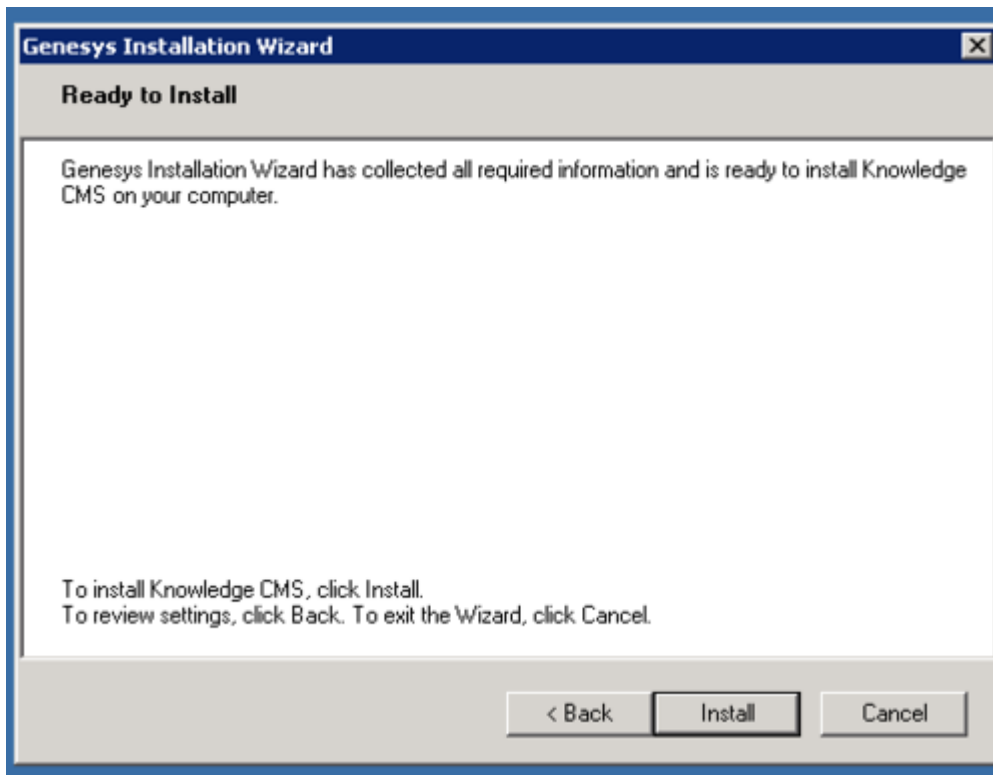
Choosing the Knowledge Center CMS Installation Destination

9. Click **Next**. Choose the appropriate version of the Java JDK.



Selecting the Knowledge Center CMS Java Version

10. Click **Next**. The **Ready to Install** screen appears.



Knowledge Center Knowledge Center is Ready to Install

11. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Genesys Knowledge Center CMS. When through, the **Installation Complete** screen appears.
12. Click **Finish** to complete your installation.
13. Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.

Important

The Windows service will not be automatically configured during installation of the CMS. To configure the Windows service, start *server.bat* with the following parameters: **server.bat install**. To run the server as service, comment out the (REM) APP_TYPE property in *senenv.bat* before installing the service.

End

Linux Installation Procedure

Start

1. Open a terminal in the CMS installation package, and run the *install.sh* file. The Genesys installation starts.
2. Enter the hostname of the host on which you are going to install.
3. Enter the connection information required to log in to the Configuration Server:
 1. **Hostname**—For instance, *demosrv.genesyslab.com*
 2. **Listening port**—For instance, *2020*
 3. **User name**—For instance, *demo*
 4. **Password**
4. If you have a backup Configuration Server, enter the Host name and Port.
5. If the connection settings are successful, a list of keys and Knowledge Center CMS applications is displayed.
6. Enter the key for the Knowledge Center CMS application that you created previously in Configuration Server.
7. Enter the full path to your installation directory and confirm that it is correct.
8. If the installation is successful, the console displays the following message:
Installation of Genesys Knowledge CMS, version 8.5.x has completed successfully.

End

Configuring the CMS

The Knowledge Center Server includes an embedded Jetty server. After installation, you can carry out your initial configuration by creating a *work* directory for temporary Jetty files inside the *./server* folder.

Configure Required CMS Access Options

Genesys Knowledge Center supports the following privileges to restrict agent access:

- **Knowledge.CMS.Document.Author**—create, edit, or delete documents
- **Knowledge.CMS.Category.Author**—create, edit, or delete categories
- **Knowledge.CMS.Approver**—approve documents and categories, and export data
- **Knowledge.CMS.Administrator**—create, edit, or delete knowledge bases

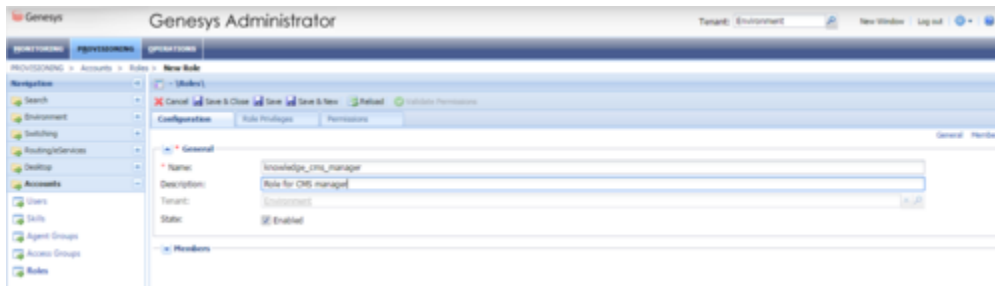
Important

Only agents who have both **Knowledge.CMS.Document.Author** and **Knowledge.CMS.Category.Author** privileges can successfully import data from XML files.

To configure the appropriate privileges for an agent:

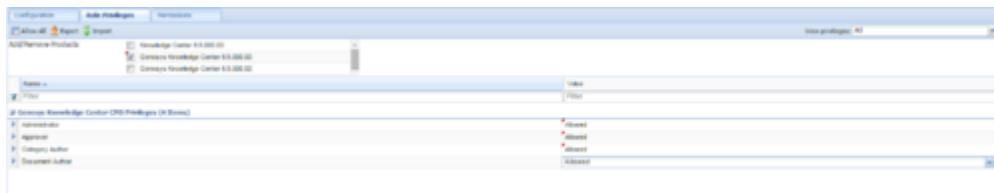
Start

1. Go to **Provisioning > Accounts > Roles**.
2. In the taskbar, click **New** to create a new object.
3. Set the name of the role in the **General** section.



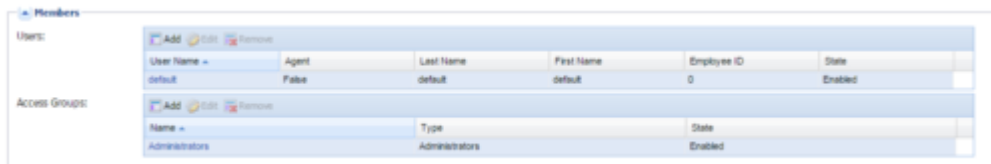
Knowledge Center CMS Access Roles

4. Go to the **Role Privileges** tab and select the set of roles for Genesys Knowledge Center.
5. Open the Genesys Knowledge Center CMS privileges list.
6. Set the appropriate privileges to **Allowed**.



Setting Knowledge Center CMS Access Privileges

7. Go back to the **Configuration** tab.
8. In the **Members Section**, add the appropriate Agent by clicking the **Add** button.



Knowledge Center CMS Members Section

9. In the **Tenants** section, add a working tenant by clicking **Add**. Browse and choose the appropriate tenant in the pop-up dialog. Click **OK**.
10. Save and Close.

End