

GENESYS

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Genesys Knowledge Center Deployment Guide

Installing and Using the Administrator Plugin

5/8/2025

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Installing and Using the Administrator Plugin

Important

Genesys Knowledge Center Plugin for Genesys Administrator has been discontinued as of release 8.5.303.xx of the product. All functionality of the plugin has been migrated into the Knowledge Center CMS which now permits content authoring as well as knowledge base management. For more information, please see Installing the Knowledge Center CMS.

Please skip this chapter if you are using 8.5.303.xx or higher installation version.

Installing the Knowledge Center Plugin for Administrator

Prerequisites

- Genesys Administrator must have been installed, but should be stopped before installing the plugin
- If the Administrator Plugin was previously installed on the current host, manually remove the previous version from the */plug-ins* folder in the Genesys Administrator installation directory

Windows Installation Procedure

Start

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



Knowledge Center Administrator Plugin Install Shield Window

2. Click Next. The Choose Destination Location screen appears.

Genesys Installation Wizard	×
Choose Destination Location	
Genesys Installation Wizard will install Genesys following Destination Folder. To install to this folder, click Next. To install to a different folder, click Browse and To restore a path to default Destination Folder	s Knowledge Center Plugin for Administrator in the d select another folder. , click Default.
C:\Program Files\GCTI\KnowCntPlgnAdm	
	Default Browse
	< Back Next > Cancel

Knowledge Center Administrator Plugin Destination Window

- 3. Under **Destination Folder**, keep the default value or browse to the desired installation location. Click **Next**.
- 4. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation. When it has finished, the **Installation Complete** screen appears.

Genesys Installation Wizard		×
Ready to Install		
Genesys Installation Wizard has collected all re Knowledge Center Plugin for Administrator on ye	quired information and is ready to install Genesys our computer.	
To install Genesys Knowledge Center Plugin for To review settings, click Back. To exit the Wize	r Administrator, click Install. ard, click Cancel.	
	< Back Install Cancel	

Knowledge Center Administrator Plugin Installation Complete

- 5. Click **Finish** to complete your installation.
- 6. Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.
- 7. gax-plugin-knowledge.jar should be added as a Genesys Administrator plugin.
- 8. Restart Genesys Administrator.

End

Linux Installation Procedure

Start

- 1. Open a terminal in the Genesys Knowledge Center Plugin for Administrator IP, and run the *install.sh* file. The Genesys Installation starts.
- 2. Enter the full path to the GAX installation directory.
- 3. Enter the full path to your installation directory for the plugin and confirm it.

- 4. If the installation is successful, the console displays the following message: Installation of Genesys Knowledge Center Plugin for Administrator, version 8.5.x has completed successfully.
- 5. gax-plugin-knowledge.jar should be added as a Genesys Administrator plugin.
- 6. Restart Genesys Administrator.

End

A **Knowledge Center** item should appear under the Administration menu.



Knowledge Center in Administrator Menu

Providing access to Knowledge Center Plugin for Administrator

Important

Users must have the next privilege in order to use the Administrator plugin.

- Allows agent to manage knowledge bases (Knowledge. ADMINISTER) Enables access to the Knowledge Center Plugin for Administrator tab in Genesys Administrator (in "Genesys Administrator Extensions - Genesys Knowledge Center Plug-in" privileges)
- To save a created configuration the user should at least belong to the Administrators Access Group

To configure the appropriate role for an agent:

Start

- 1. Go 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. Choose the application template (APD) file from the import window and click Add.
- 5. Browse to the Knowledge_Center_GAX_Plugin_853.apd file available in the templates directory of your installation CD. The **New Application Template** panel opens.

6. Click Import Metadata.

- 7. Click **Add** and select the Knowledge_Center_GAX_Plugin_853.xml file.
- 8. Click Open.
- 9. Information from the metadata file will be added to the template and the appropriate privilege will be added into the framework.
- 10. Save and Close.
- 11. Go to **Provisioning > Accounts > Roles**.
- 12. In the taskbar click **New** to create a new object.
- 13. Set the name of the role in the **General** section.
- 14. Go to the Role Privileges tab, and select the set of roles for Genesys Knowledge Center.
- 15. Open the **Genesys Administrator privileges** list and select the Genesys Knowledge Center Plug-In Privileges section.
- 16. Set the appropriate privileges as allowed.
- 17. Go back to the **Configuration** tab.
- 18. Add the appropriate **Agent** to the **Members** section by clicking the **Add** button.
- 19. Save and Close.

End

Managing Knowledge Bases

In order to use Knowledge Center Server you need to create at least one knowledge base in the Knowledge Center Cluster application, using the Knowledge Center Plugin for Administrator. This section describes the structure and specific options you need in order to create an index for this knowledge base in Knowledge Center Server.

Selecting the Knowledge Center Cluster Application

Start

1. Log in to Genesys Administrator and navigate to the **Administration > Knowledge Center** menu item.



2. Using the button, open the menu for **Select Knowledge Cluster**. Select the appropriate cluster from the drop-down and click the **Ok** button. A list of the knowledge bases that have been defined for this cluster will be displayed.

GAX Dashboard A	gents Config	juration	Adminis	stration	Users		
knowledge_	Space						
Knowledge_Spa	ce			< >		Knowledge Cluster Selection	×
Q. Quick Filter		+	0	\$		Knowledge Cluster Application	
			Put	rge All		Knowledge_Space	*
10	Knowledge 8	lase Name					Ok

Selecting a Knowledge Cluster

End

Creating a Knowledge Base

Start

- 1. Click the + button. A panel with the main knowledge base parameters will be displayed. Fill in the following fields:
 - **ID**—The ID should only contain numbers, lower-case Latin letters, and underscores, with a maximum length of 50 characters. The limitation to lower-case letters is because ElasticSearch is case-insensitive and will therefore render all names as lower-case.
 - Name—Maximum length is 50 characters
 - Description—optional
 - Select the type of the content to be stored in knowledge base Content type:
 - FAQ Frequently asked questions
 - Articles rich-text documents
 - Select the allowed feedback type for the knowledge base Feedback types support:
 - Voting (relevance feedback for search query) and Rating (5-star rating of the document content)
 - only voting
 - only raiting
 - none (all feedback capabilities are disabled)
 - Select the first knowledge base language.
 - Make the knowledge base public or private. (If the knowledge base is made public, it will be visible to all users, whether or not they are authorized.)

Important

Later for private knowledge bases you can specify whether the knowledge base should be available to all of your agents or only to the agents that have one of the specified skills. In the case where you have specified several skills for the knowledge base, the agent needs to have at least one of them to access the knowledge base. Skill level does not influence ability to access the knowledge base.

- Make the knowledge base active or inactive. If you un-check Knowledge Base is active neither your customers nor your agents will be able to search for information in that knowledge base. Authors, agents with the privilege Knowledge.Author and administrators with the privilege Knowledge.Admin, can still use the base to prepare content stored in it.
- You can make your private knowledge bases (when Knowledge base is public is not checkmarked) available to only a subset of your agents by selecting Skill-based access to knowledge base. If you choose to make the knowledge base accessible to an agent with specific skills, you will need to select the skills that will grant an agent access to the knowledge base.

Add Skill		< ×
Select skill *		
tech		×
	Save	Cancel

Making a Knowledge Base Accessible by Skill

2. Click **Save**. The knowledge base will be created.

End

Creating Custom Fields

Start

1. Click the + sign under the **Custom Fields** section. The **New Custom Field** panel will be displayed.

Delete Purge Options English, default French German + Monwledge base is active * * Monwledge base is active * * Monwledge base is active * * Monwledge base is active * * Monwledge base is public Custom Fields QNA business vaue (value, string) 1	0
All English, default French German	-
French German	
Inumber for knowledge base Inumber for knowledge base	0
+ ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields QNA business vaue (value, string)	
Knowledge base is active Knowledge base is public Custom Fields QNA business vaue (value, string) Minimum Value 1 Maximum Value	0
Knowledge base is active Knowledge base is public Custom Fields QNA business vaue (value, string) Minimum Value 1 Maximum Value	~
Image: Second	0
QNA business vaue (value, string) Minimum Value 1 Maximum Value	
Maximum Value	
maximum varue	
1000	
(+)	
	vel
Save Cancel	
· ·	

- 2. To define a custom field, fill in the following information:
- Name—Should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters.
- Display name
- Select the type of field
- For **String** fields define:
 - Default value (optional)
 - If the field can be left empty, set the check box to Allow empty
- For **Numeric** fields define:
 - Default value (optional)
 - Minimum value (optional)
 - Maximum value (optional)
- For **DateTime** fields define:
 - Default value (optional; format should be yyyy-MM-dd HH:mm:ss)
- For Boolean
 - Default value (optional)
- For List of values
 - List of the allowed values

- Default value (one from the list)
- Visibility of the custom field: whether it visible for agent and customer or just agents.

• Click **Save** to save your changes.

End

Adding Language-specific Information

Start

1. Click the **English, default** row in the **Languages** section. A panel with language-specific settings will be displayed.

	kilowiedgerAq	English		
	Delete Purge Options	Language*		
urge All		English 👻		
	Name	 Set as default language 		
	knowledgeFAQ	Knowledge base name		
	Description 0	knowledgeFAQ		
	knowledge test	Knowledge base description		
	Languages 0	knowledgeFAQ		
	English, default			
	French	Default filter conditions		
	German	No items		
, 	+			
	 Knowledge base is active 	+		
	✓ Knowledge base is public	Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP")		
	Custom Fields			
	QNA business vaue (value, string)			

- 2. You can define the following parameters in this section:
- A localized knowledge base name
- A localized knowledge base description
- · Whether or not the selected language is the default
- Click the **Save** button

End

Editing Knowledge Base Options

Start

1. To edit the options for a particular knowledge base, click the **Options** button and then click the appropriate option to edit its value. The options are initialized with their default values.

< ×	Options	<	> ×	Number of answers in preconfi <
Options		Q, Quick Filter		Option value *
. i	Name		v	30
	* 🖿 Behavior			Valid value
0	🔻 🖿 faq			int, in range [1; 1000] Description
	🖋 Out of doma	in	0.5	Number of answers that system examines for confidence calculation. Must be more or equal to
0	/ Number of a	nswers in preconfidence sele	30	Number Of Answers Option Name
	🖊 Trending per	iod in days	30	numberOfAnswersInPreConfidenceSelection
	/ Number of a	nswers	15	\sim
+				Save Direct

2. Enter the new option value and click the **Save** button.

End

Important

It is not recommended to set the out-of-domain value higher than 0.75 as it represents an exact match of the question with no feedback accumulated for the query. The optional setting is 0.5 (default value).

Editing a Knowledge Base Definition

Start

1. Select a knowledge base from the list.

1	Knolwedge_Spac	e_Freeling	< >] [knowledgeFAQ		< ×
	Q, Quick Filter	+ 0			Delete	Purge	Options
		Purg	ge All		English, default French		î
/	ID	Knowledge Base Name			German		
[public_inactive	Public inactive KB					
	inactive	Inactive KB			✓ Knowledge base is active		+
N	skille_all	With skill and all access			✓ Knowledge base is public		
	test_kb	test_kb			QNA business vaue (value, stri	ng)	0
	inactive_skill	Inactive KB with skill					
/	skilled	KB with skills					
	skill	skill					+
	knowledgefaq	knowledgeFAQ			Æ		_
	private active	Private KB			Save		Cancel
			-			-	

2. Edit the knowledge base definition and click the **Save** button.

End

Deleting a Knowledge Base Definition

Start

- 1. Select a knowledge base from the list.
- 2. Press the **Delete** button and confirm the action.

End

Purging Knowledge Bases

Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a Knowledge Center Cluster application

Start

1. To purge a particular knowledge base, select it from the list, press the **Purge** button, and confirm the action.

ing < > + ⊖ ≞	knowledgeFAQ < × Delete Purge Options
Purge All wledge Base Name	Name O
plic inactive KB	Purge knowledge base × Image: Are you sure you want to purge 'knowledgefaq' knowledge × base? ×
I and all access	Lan En Ok Cancel
KB with skill	German
erdgeFAQ	 Knowledge base is active Knowledge base is public Custom Fields

2. To purge all knowledge bases, use the **Purge All** button.

End