



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Genesys Knowledge Center Deployment Guide

Installing and Using the Administrator Plugin

5/8/2025

Contents

- 1 Installing and Using the Administrator Plugin
 - 1.1 Installing the Knowledge Center Plugin for Administrator
 - 1.2 Managing Knowledge Bases

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

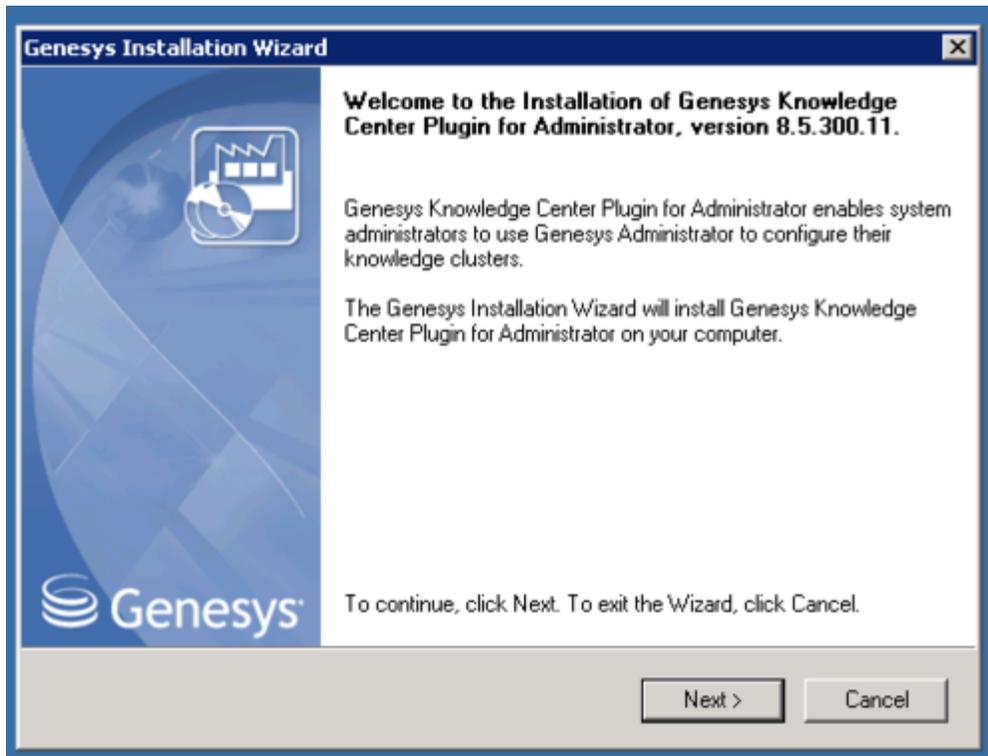
Prerequisites

- 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

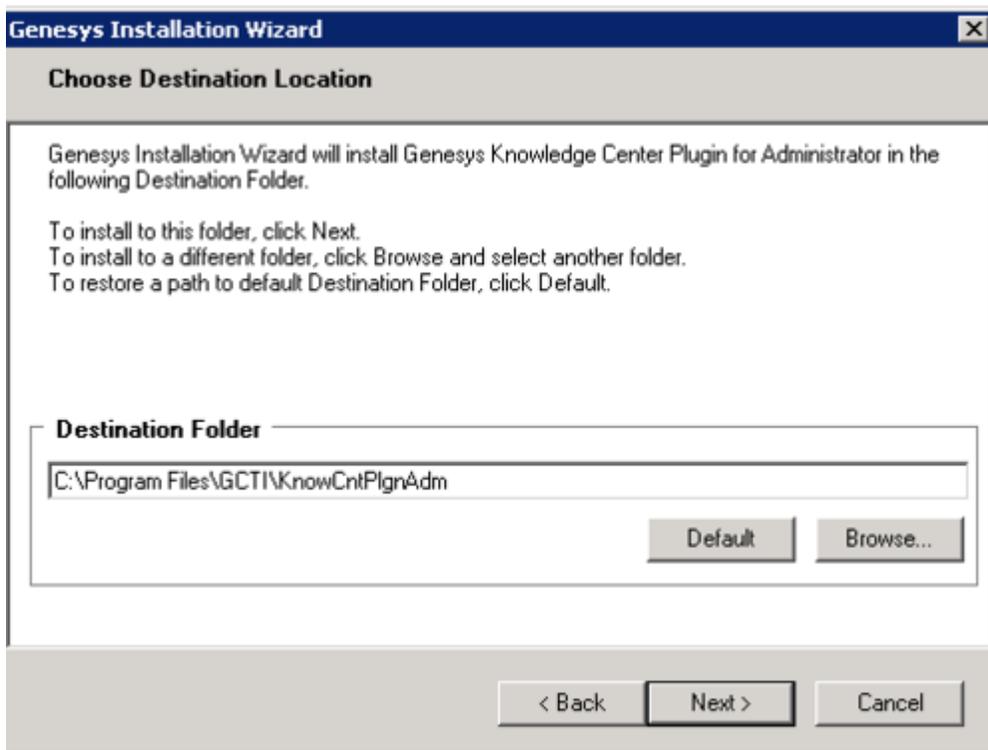
Start

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



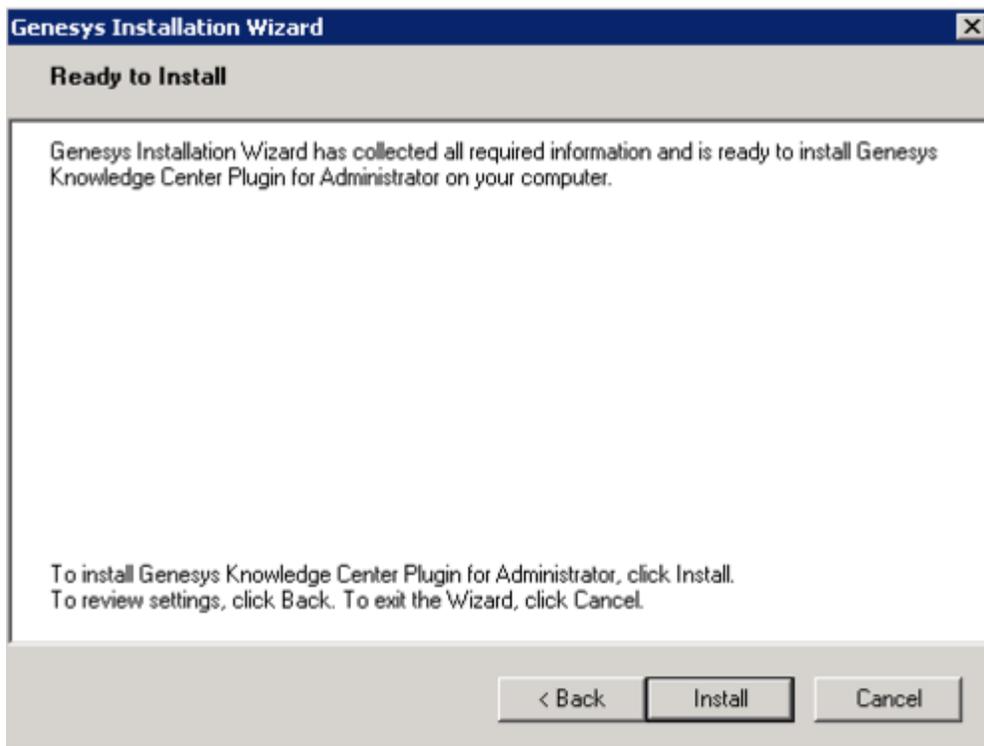
Knowledge Center Administrator Plugin Install Shield Window

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



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.



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

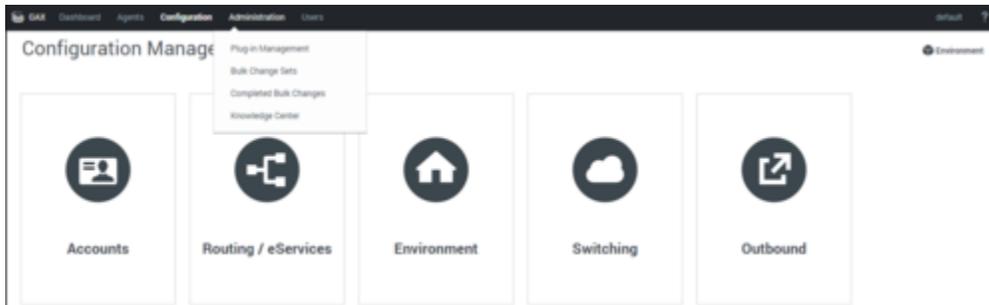
1. Open a terminal in the Genesys Knowledge Center Plugin for Administrator IP, and run the *install.sh* file. The Genesys Installation starts.
2. Enter the full path to the GAX installation directory.
3. Enter the full path to your installation directory for the plugin and confirm it.

Installing and Using the Administrator Plugin

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.

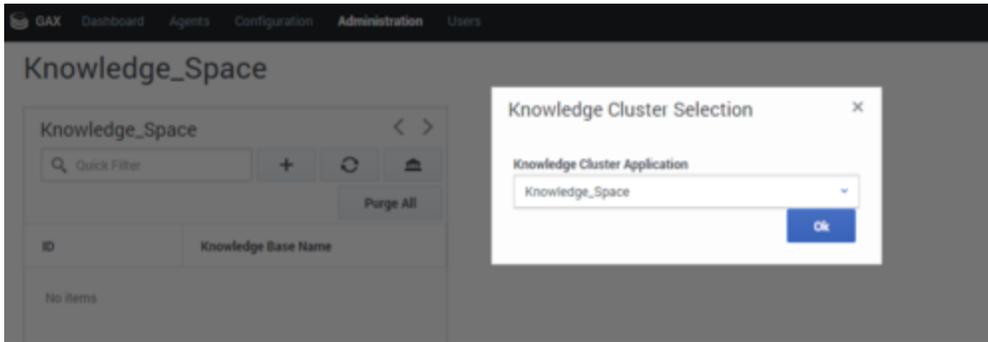
Selecting the Knowledge Center Cluster Application

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.



Selecting a Knowledge Cluster

End

Creating a Knowledge Base

Start

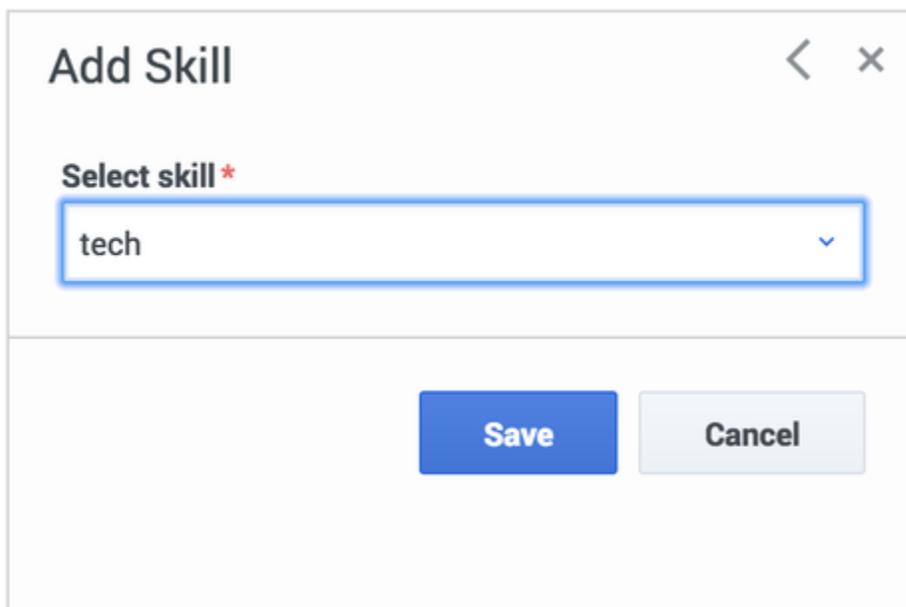
1. Click the + button. A panel with the main knowledge base parameters will be displayed. Fill in the following fields:
 - **ID**—The ID should only contain numbers, lower-case Latin letters, and underscores, with a maximum length of 50 characters. The limitation to lower-case letters is because ElasticSearch 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 rating
 - 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 checked) 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.



Making a Knowledge Base Accessible by Skill

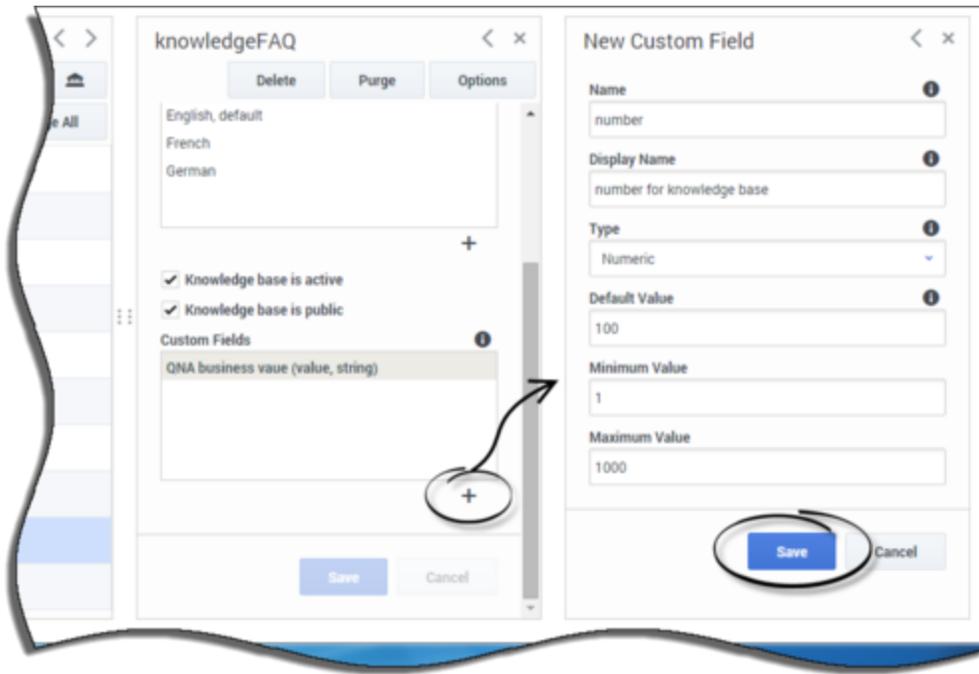
2. Click **Save**. The knowledge base will be created.

End

Creating Custom Fields

Start

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



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

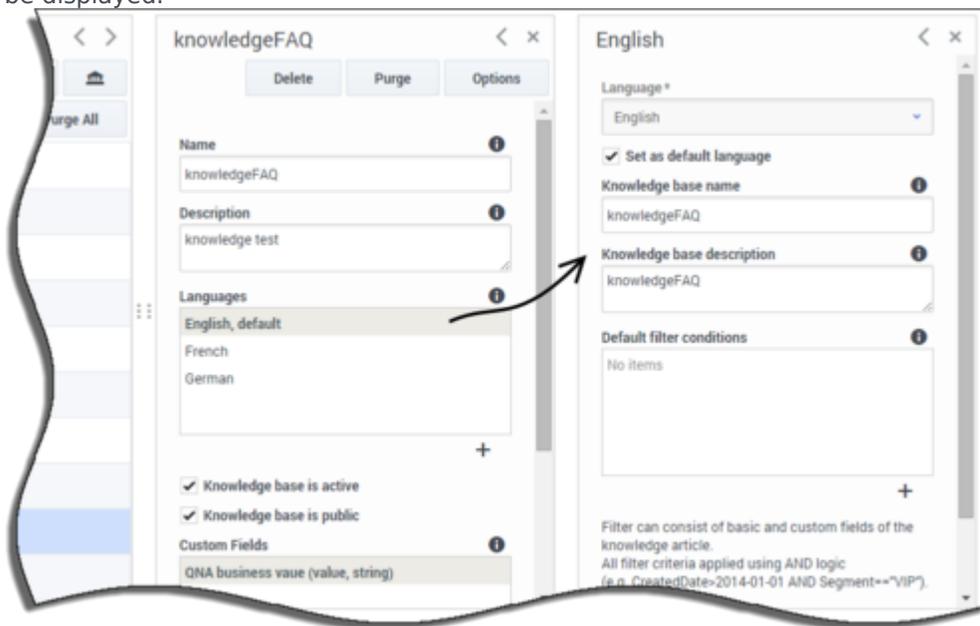
- Default value (one from the list)
 - Visibility of the custom field: whether it visible for agent and customer or just agents.
- Click **Save** to save your changes.

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.



2. You can define the following parameters in this section:

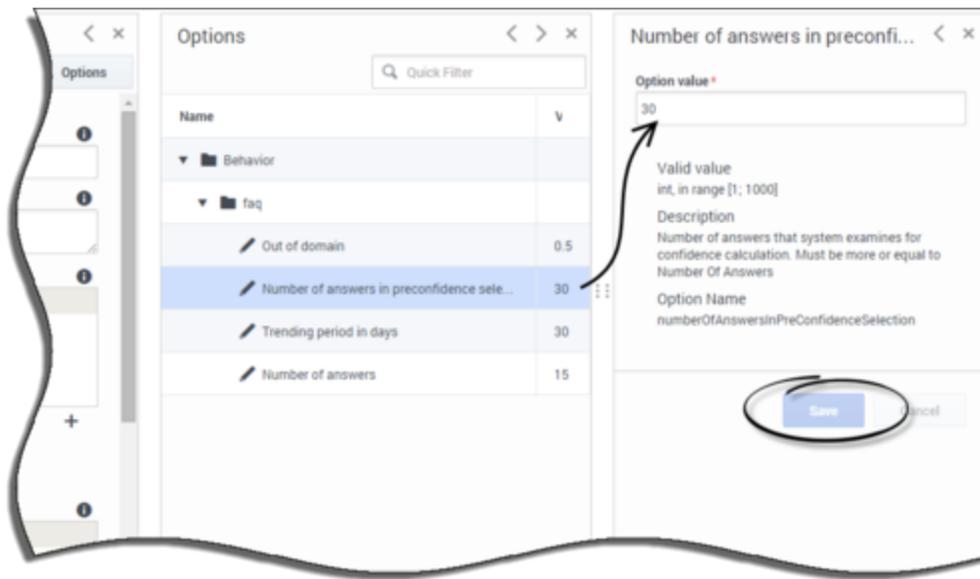
- A localized knowledge base name
 - A localized knowledge base description
 - Whether or not the selected language is the default
- Click the **Save** button

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.
-



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

End

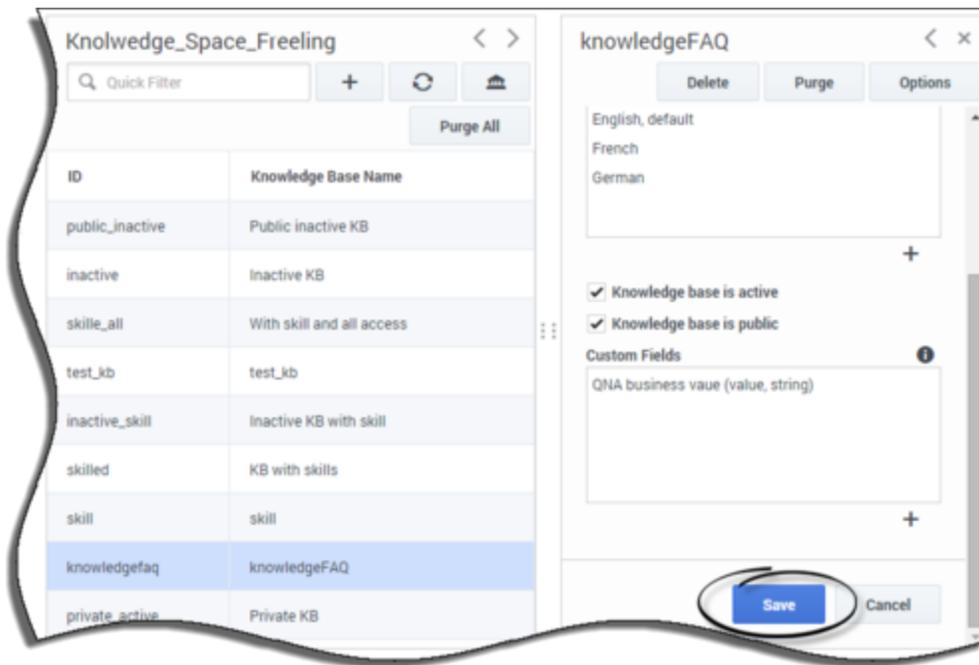
Important

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.



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

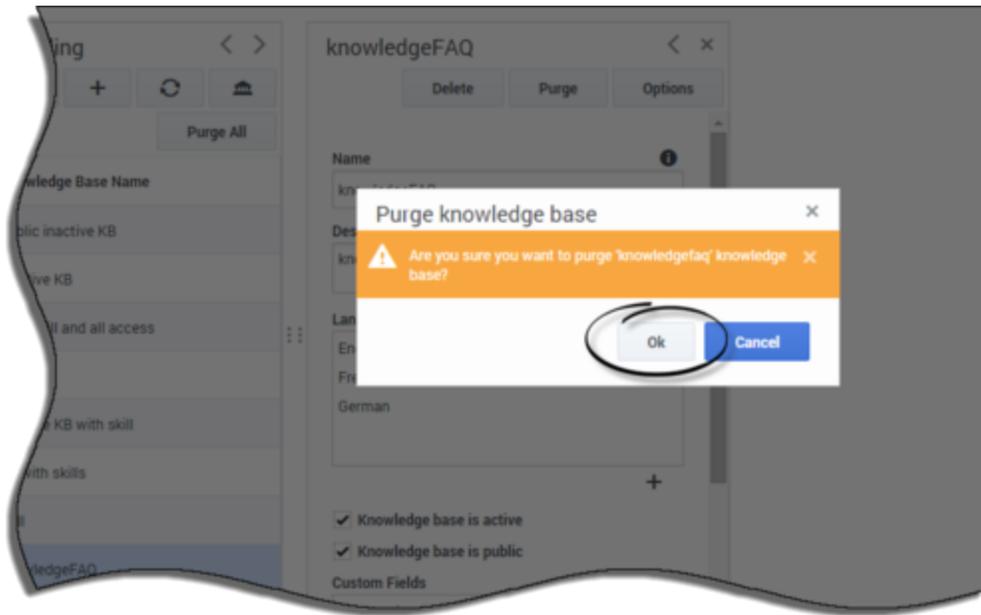
Purging Knowledge Bases

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.



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

End