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Genesys Knowledge Center Deployment Guide

Installing the Knowledge Center CMS

12/19/2025

Installing the Knowledge Center CMS

The 8.5.3 release of the Genesys Knowledge Center incorporates two major changes in the CMS component architecture:

- The cluster mode is the default and the only mode to run CMS (no matter you start with just one node in a cluster or your cluster already have multiple nodes). This puts the restriction on the persistent storages used by the CMS.
- The persistent storage selection is one of the important choices that need to be done when planning a deployment of Genesys Knowledge Center CMS. Knowledge Center support following persistent storages:
 - Microsoft SQL Server 2012
 - Oracle 11g (supported from version 8.5.302.xx)
 - Cassandra 2.2.x (deprecated)

Important

To ensure strong consistency of the data (no matter the configuration of the underlying storage) it was decided to deprecate Cassandra 2.2.x support in 8.5.3 release of the product. Going forward, **support of Cassandra will be discontinued in 9.0 release of the product.**

Important

Starting from 8.5.3 release, usage of the file storage has been discontinued. (It does not provide the desired reliability for storage, particular medium to large data amounts, and it is incompatible with cluster mode.)

- To ensure fast operations with CMS, CMS now comes with indexing engine that helps to execute your requests in a timely manner.

Install the CMS

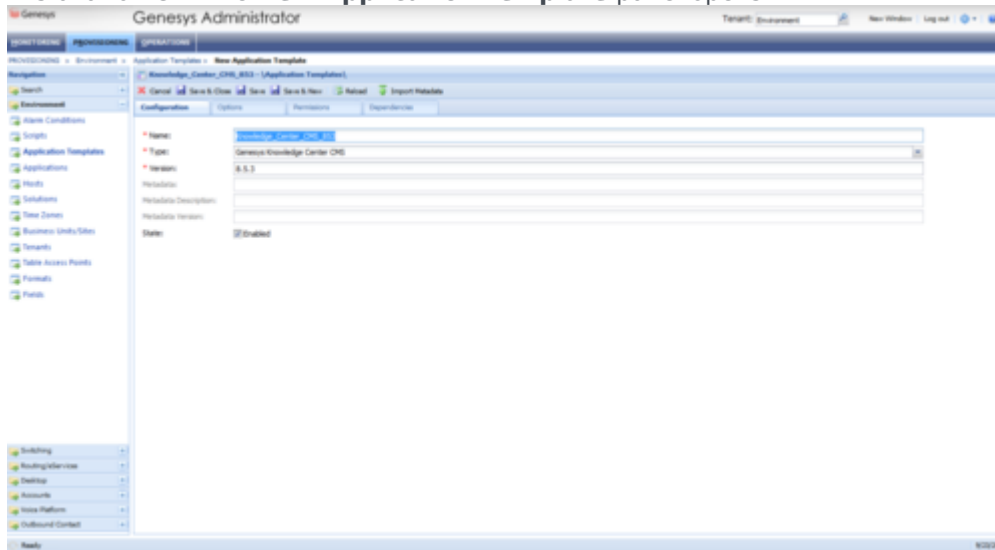
Import the CMS Application Template

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_853.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.



The Knowledge Center CMS Application Template

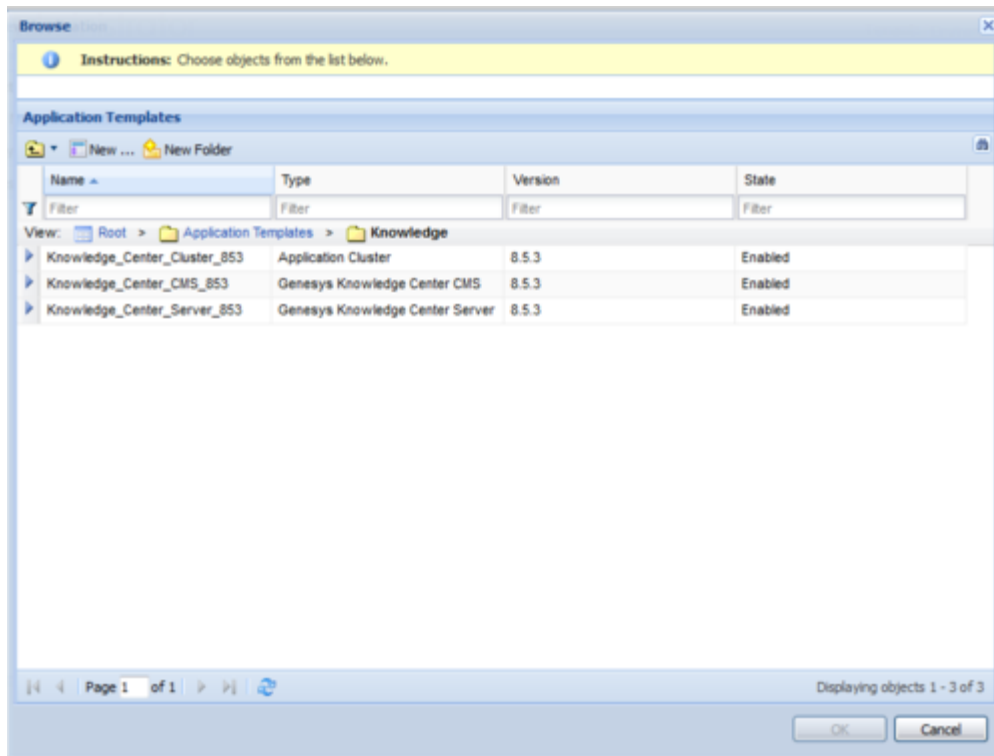
5. Click **Save and Close**.

End

Create CMS Applications

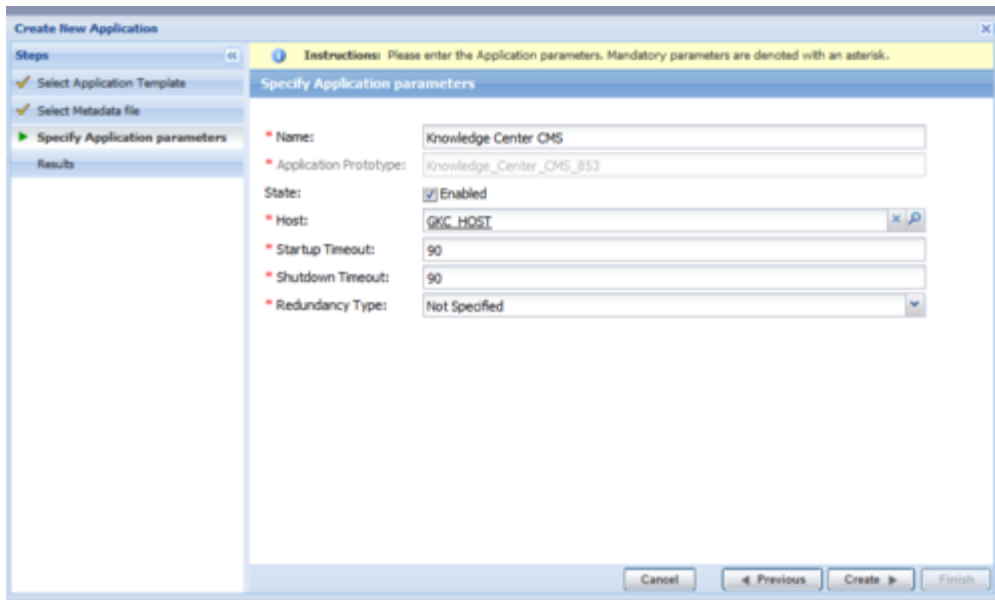
Start

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 CMS application template that you imported earlier. Click **OK**.



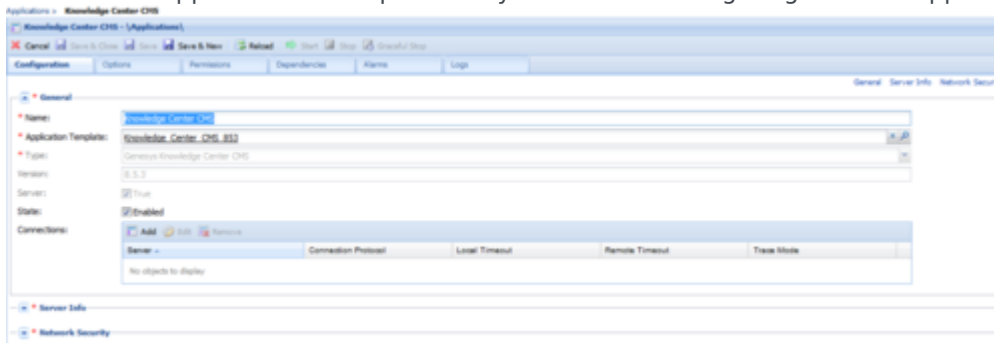
Selecting the Knowledge Center CMS Template

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_853.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**:
 - a. Enter a name for your application. For instance, *Knowledge Center CMS*.
 - b. Enable the **State**.
 - c. Select the Host on which the CMS will reside.
 - d. Click **Create**.



Creating the Knowledge Center CMS Application

5. The **Results** panel opens.
6. 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

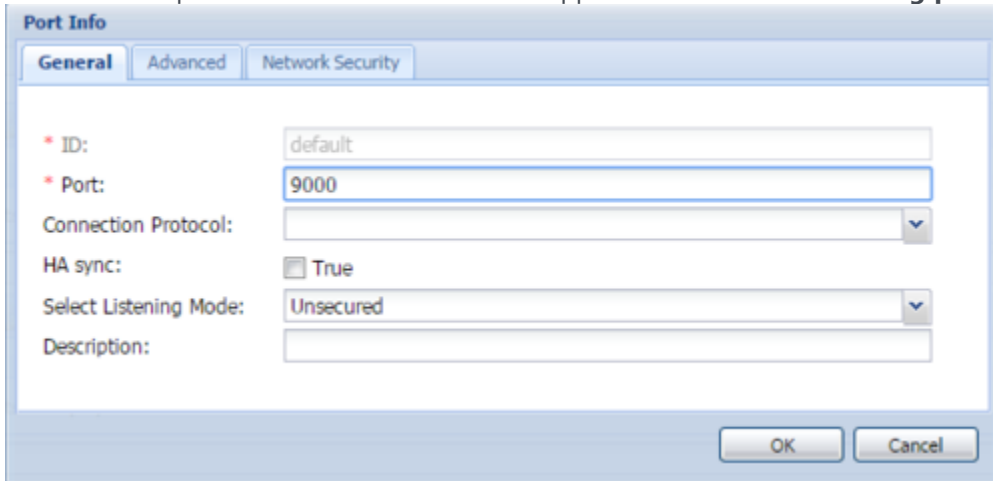
End

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.
Note: Cassandra Resource access point will need to point on one of the seed nodes you have in your Cassandra deployment.
6. In the **Listening Ports** section, create the default port by clicking **Add**. The **Port Info** dialog opens.
 - a. Enter the **Port**. For instance, 9000.
 - b. Click **OK**. The port with the default identifier appears in the list of **Listening ports**.



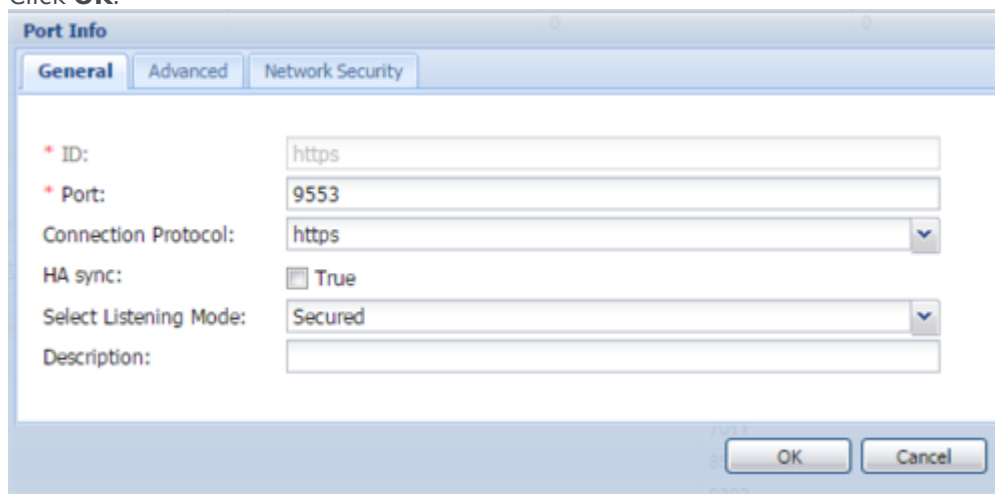
The image shows the 'Port Info' dialog box with the 'General' tab selected. The fields are as follows:

Field	Value
* ID:	default
* Port:	9000
Connection Protocol:	[Dropdown arrow]
HA sync:	☒ True
Select Listening Mode:	Unsecured [Dropdown arrow]
Description:	[Empty text box]

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. Click **Add**. The **Port Info** dialog opens.
 - a. Enter *https* for the **ID** field.
 - b. Enter the port . For instance, 9553.
 - c. Enter *https* for the **Connection Protocol**.
 - d. Choose **Secured** for the **Listening Mode**.
 - e. Click **OK**.



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

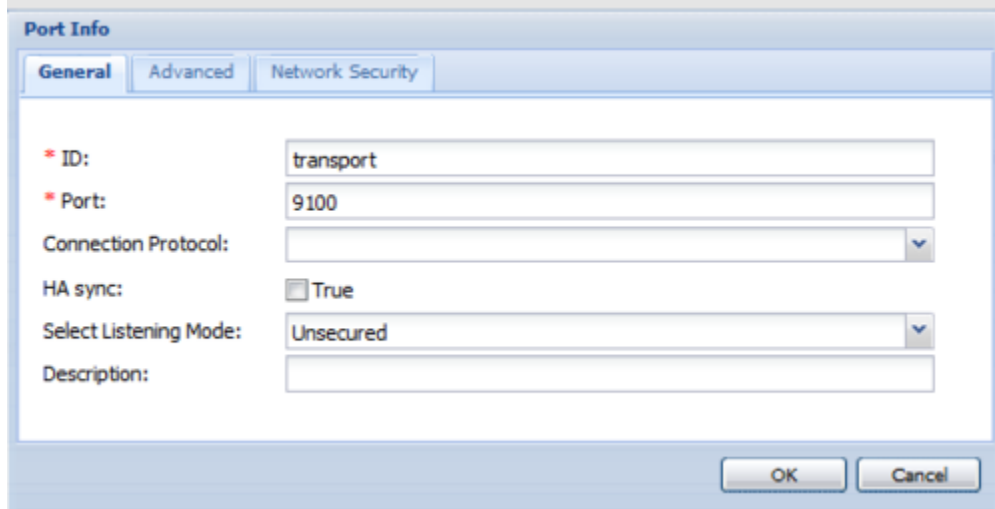
Field	Value
* ID:	https
* Port:	9553
Connection Protocol:	https [Dropdown arrow]
HA sync:	☒ True
Select Listening Mode:	Secured [Dropdown arrow]
Description:	[Empty text box]

At the bottom right are 'OK' and 'Cancel' buttons.

GKS CMS https port

Note: If https port is enabled, service will only be available on https port and http connection will be unavailable.

6. Optionally, you can explicitly add Transport port for ElasticSearch engine. If you do not define transport port, port 9301 will be used. To specify the port, click the **Add** button. The **Port Info** dialog opens.
 - a. Enter transport for the **ID** field.
 - b. Enter the **Port**. For instance, 9100.
 - c. Click **OK**.



The **Port Info** dialog box has three tabs: **General**, **Advanced**, and **Network Security**. The **General** tab is active. It contains the following fields:

- * ID:** transport
- * Port:** 9100
- Connection Protocol:** (dropdown menu)
- HA sync:** ☐ True
- Select Listening Mode:** Unsecured (dropdown menu)
- Description:** (text field)

At the bottom right are **OK** and **Cancel** buttons.

7. Optionally, you can explicitly add JGroups for communication between CMS nodes in the cluster. If you do not define this port, default value depending on chosen type of communication will be used . To specify the port, click the **Add** button. The **Port Info** dialog opens.
 - a. Enter jgroups for the **ID** field.
 - b. Enter the **Port**. For instance, 9110.
 - c. Click **OK**.
8. Ensure the **Working Directory** and **Command Line** fields contain "." (period).



The **Configuration** window has tabs: **Configuration**, **Options**, **Permissions**, **Dependencies**, **Alarms**, and **Logs**. The **Configuration** tab is active, and the **Server Info** sub-tab is selected. It shows the following settings:

- Tenants:** (table with columns Name, State)
- * Host:** plc-host
- * Listening Ports:** (table with columns ID, Port)

ID	Port
default	8443
- * Working Directory:** .
- * Command Line:** .
- Command Line Arguments:** (text field)
- * Startup Timeout:** 90
- * Shutdown Timeout:** 90
- Backup Server:** [Unknown Backup Server]
- * Redundancy Type:** Not Specified
- * Timeout:** 30
- * Attempts:** 3
- Auto Restart:** ☒ True
- Log On As SYSTEM:** ☒ 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**.

Important

For Knowledge Center 8.5.302.xx and earlier Cluster can only work under a single tenant. Starting from 8.5.303.xx release of the product it supports multiple tenants within one cluster deployment. Application Cluster and GKC server/CMS should be in the same tenant

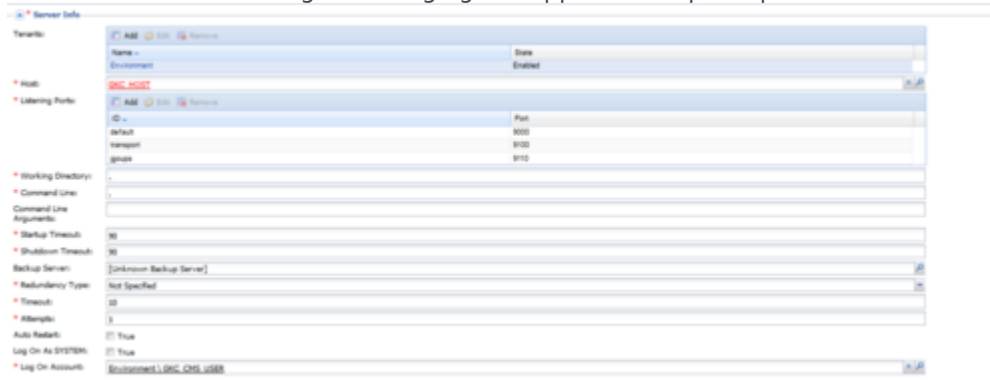
10. Uncheck **Log On As SYSTEM**.

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.AUTHOR** (Allows agent to change data in a knowledge base) privilege and **Knowledge.MULTITENANT** (Allows to bypass tenants restrictions) in case multi-tenant configuration (required for **scheduled synchronization**)
- User should have access to the same tenant/tenants in which that CMS is configured
- User should be granted "Read and Execute (RX)" and "Read Permissions (E)" permissions for Environment tenant, if the application configured not in the Environment tenant; user should belong to Administrators Access Group in CMS tenants (required for scheduled synchronization)

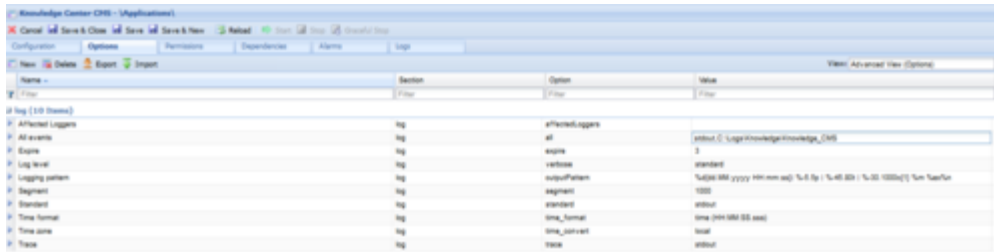
14. Click **Save**.

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



Knowledge Center CMS Information

16. Go to **Application Cluster** application, open **Options** tab. In section cms.general set valid URL to CMS or CMS cluster load balancer in externalURL option (like `http://<cms host>:<CMS default port>/gks-cms`).
17. (Optional) Select the **Options** tab. In the [log] section, the all option is set to stdout by default. Enter a filename if you wish to enable logging to a file. For example, you can enter stdout, `C:\Logs\Knowledge\Knowledge_CMS` to force the system to write logs both to the console and to a file.



End

Configure Data Source

Knowledge Center CMS requires persistent storage to be configured to store all the authored content. Please follow one of the instructions to set up storage of your choice:

Important

To ensure strong consistency of the data (no matter the configuration of the underlying storage) it was decided to deprecate Cassandra 2.2.x support in 8.5.3 release of the product. Going forward, **support of Cassandra will be discontinued in 9.0 release of the product.**

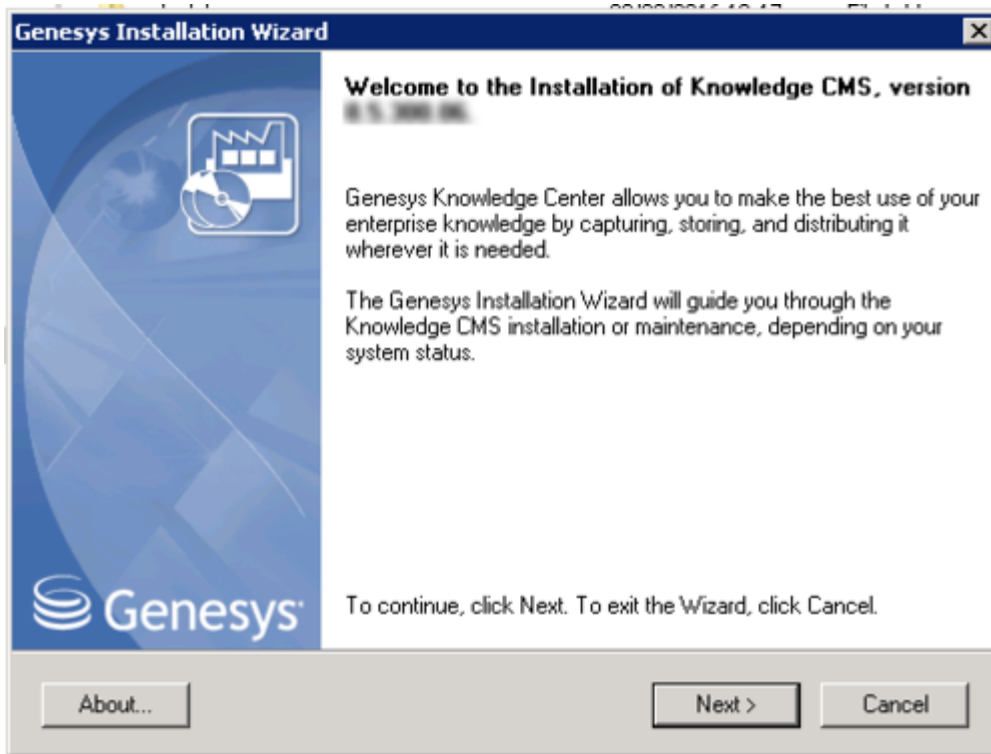
- [Microsoft SQL Server - Using CMS with Microsoft SQL Server](#)
- [Oracle - Using CMS with Oracle](#)
- [Cassandra - Using CMS with Cassandra](#)
- [PostgreSQL - Using CMS with PostgreSQL](#)

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.



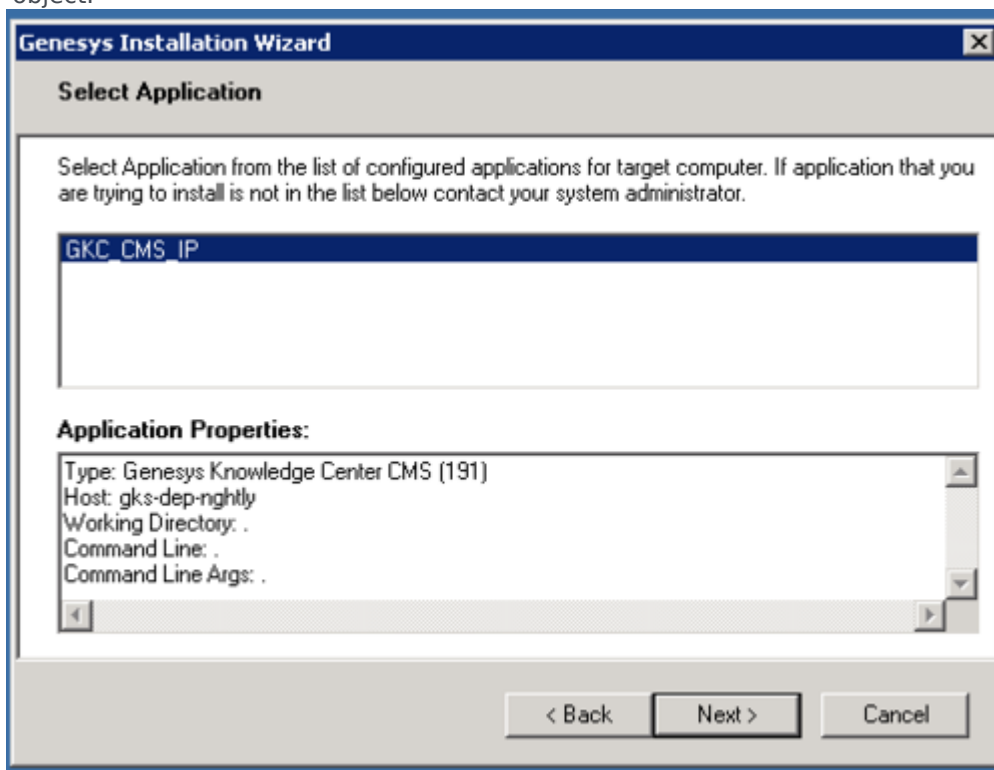
Knowledge Center CMS installation Window

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

The screenshot shows the 'Genesys Installation Wizard' window at the 'Connection Parameters to the Configuration Server' step. The title bar reads 'Genesys Installation Wizard'. The main content area has a grey background. It starts with a note: 'The parameters in the Host and User fields are required to establish a connection to Configuration Server.' There are two sections: 'Host' and 'User'. The 'Host' section asks to 'Specify the host name and port number for the machine on which Configuration Server is running.' It has two input fields: 'Host name:' with the value 'localhost' and 'Port:' with the value '2020'. The 'User' section asks to 'Specify your Configuration Server user name and password.' It has two input fields: 'User name:' with the value 'default' and 'Password:' with a masked password of ten dots. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

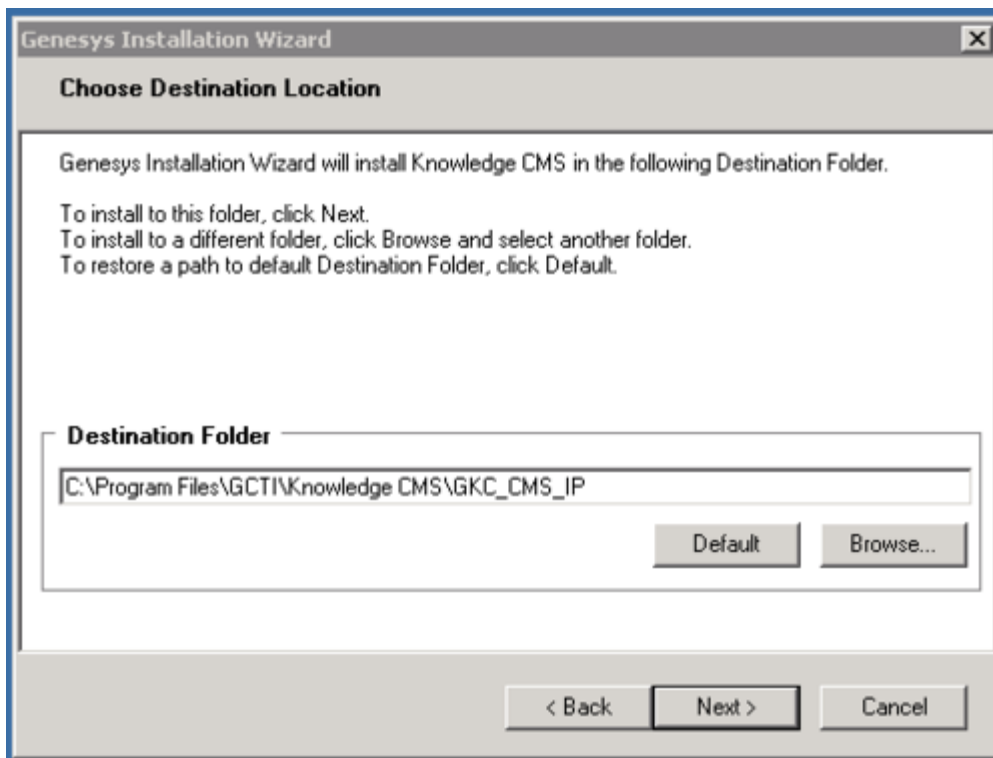
Knowledge Center CMS Connection Parameters

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.



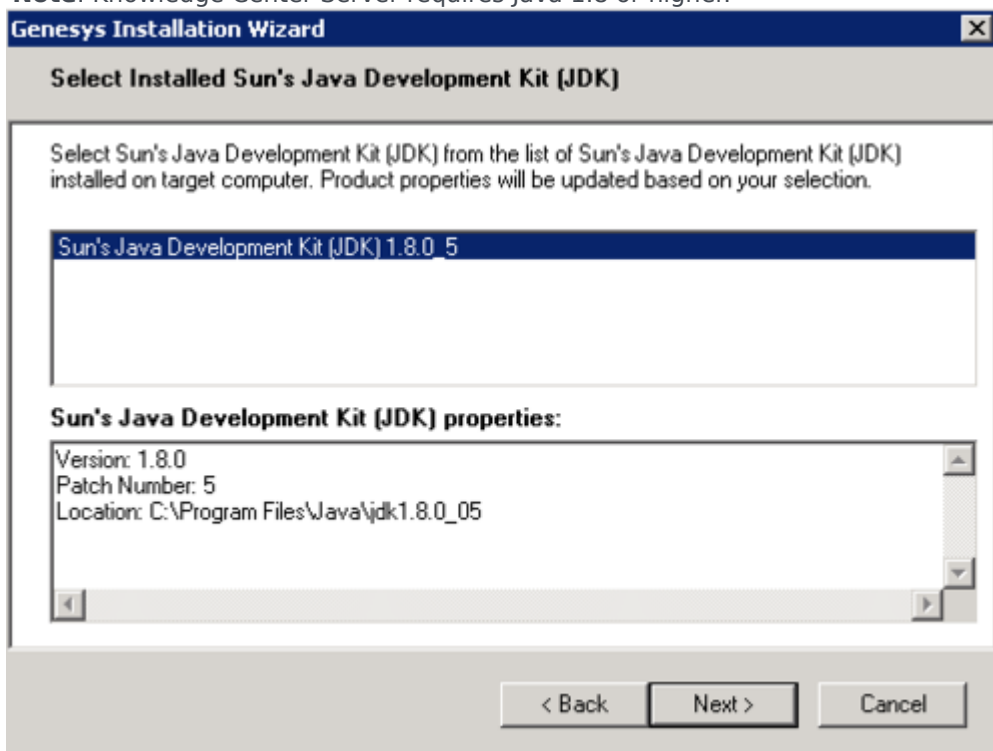
Selecting the Knowledge Center CMS Application

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



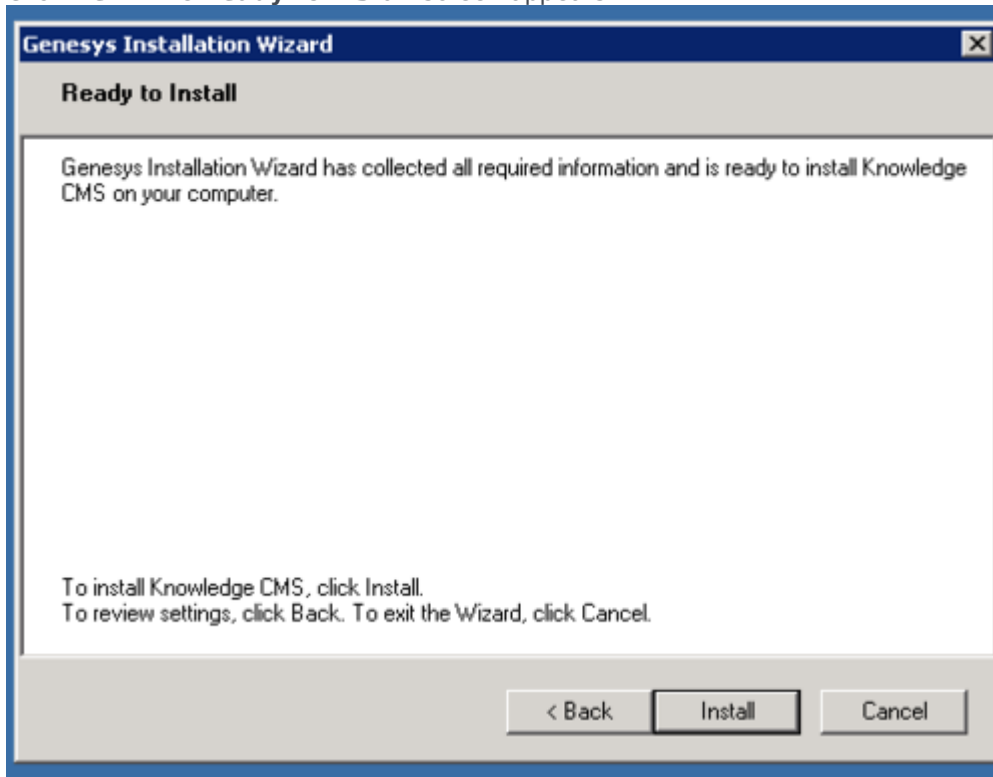
Choosing the Knowledge Center CMS Installation Destination

9. Click **Next**. Choose the appropriate version of the Java JDK.
Note: Knowledge Center Server requires Java 1.8 or higher.



Selecting the Knowledge Center CMS Java Version

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



Knowledge Center Knowledge Center is Ready to Install

- 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.
- Click **Finish** to complete your installation.
- Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.

End

Linux Installation Procedure

Start

- Open a terminal in the CMS installation package, and run the *install.sh* file. The Genesys installation starts.
- Enter the hostname of the host on which you are going to install.
- Enter the connection information required to log in to the Configuration Server:
 - Hostname**—For instance, *demosrv.genesyslab.com*
 - Listening port**—For instance, *2020*
 - User name**—For instance, *demo*
 - 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

Installing multiple CMS instances

To install multiple CMS instances you need to repeat following steps for every instance:

1. Create CMS applications
2. Configuring the Knowledge Center CMS Application
3. Installing Knowledge Center CMS

Note: Knowledge Center Cluster Application is created just ones for all CMS instances working in the same cluster.

Configuring the CMS

The Knowledge Center CMS 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.

Starting from 8.5.303.xx release of the product "work" folder will be created automatically during installation.

Configure Required CMS Access Options

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

- Administrator (allow user to carry out Administrators task like create and edit Knowledge bases)
- Approver (allow user to Approve and Publish documents)
- Category Author (allow user to create and update categories)
- Document Author (allow user to create and update documents)
- Multitenant user (Allows user to work with data in all tenants in the CMS)

Important

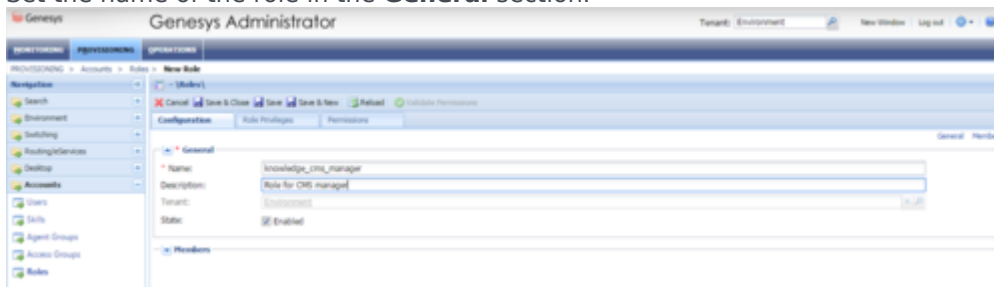
Only agents who have both Document Author and Category Author privileges can successfully import data from XML files into CMS.

To publish document from CMS to Knowledge Server agent also should have "Allows agent to change data in a knowledge base" privilege on Knowledge Server (link to Provide Knowledge Center Access to Agents in Server installation page)

To configure the appropriate privileges for an agent:

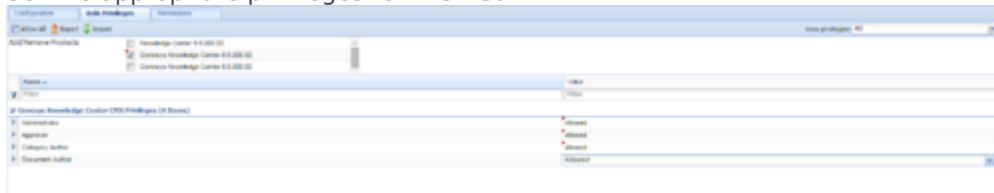
Start

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.



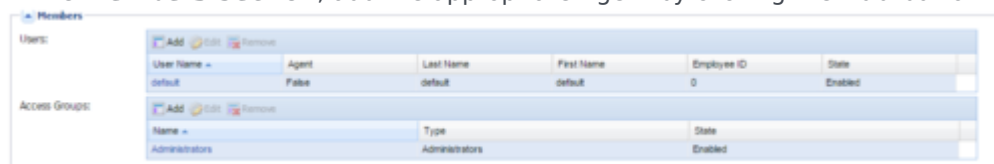
Knowledge Center CMS Access Roles

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. Save and Close.

End

Start and Stop Genesys Knowledge Center CMS

Start the CMS

Windows:

Important

You can start the Genesys Knowledge Center CMS on Windows from:

- Windows Services
- the server.bat script
- Genesys Administrator

Start

- You can start the server from Windows Services.
 1. Open Windows Services
 2. Select and start the Genesys Knowledge Center CMS [Knowledge Center CMS] service.
- You can use the provided server.bat script.
 1. Navigate to the Knowledge Center CMS installation server directory and launch the Windows command console (cmd.exe).
 2. Open server directory
 3. Type and execute server.bat, without any parameters.

Important

You can use entry in the Start > All Programs > Genesys Solutions > Knowledge Center CMS [Knowledge Center CMS] menu to start the Server using server.bat

- You can start the server from Genesys Administrator.
 1. Navigate to PROVISIONING > Environment > Applications.
 2. Select the Knowledge Center CMS
 3. Click Start applications in the Runtime panel.

End

The Genesys Knowledge Center CMS is shown in Started status in Genesys Administrator.

Linux:

Important

You can start the Genesys Knowledge Center CMS on Windows from:

- the server.sh script
- Genesys Administrator

Start

- You can use the provided server.sh script.
 1. Navigate to the Genesys Knowledge Center CMS installation directory in the Unix command console.
 2. Go to server directory
 3. Type and execute server.sh, without any parameters.
- You can start the server from Genesys Administrator
 1. Navigate to **PROVISIONING > Environment > Applications**.
 2. Select the Knowledge Center CMS.
 3. Click **Start applications** in the **Runtime** panel.

End

The Genesys Knowledge Center CMS is shown in Started status in Genesys Administrator.

After the CMS start

After successful CMS start you can use following URLs in your browser:

- `http://<cms host>:<CMS default port>/gks-cms` - to access the CMS user interface

Stop the CMS

Windows:

Important

You can stop the Genesys Knowledge Center CMS on Windows from:

- Windows Services
- Genesys Administrator
- A console window

Start

- You can stop the server from Windows Services.
 1. Open Windows Services
 2. Select and stop the Knowledge Center CMS service.
- You can stop the server from Genesys Administrator.
 1. Navigate to **PROVISIONING > Environment > Applications**.
 2. Select the Knowledge Center CMS.
 3. Click **Stop applications** in the **Runtime** panel.
- If you previously started Genesys Knowledge Center CMS in a console window, you can stop the server by closing the window or navigate to Genesys Knowledge Center CMS installation directory in Windows console (cmd.exe), open server directory and execute comand: `server.bat stop`

End

The Genesys Knowledge Center CMS is shown in Stopped status in Genesys Administrator.

Linux:

Important

You can stop the Genesys Knowledge Center CMS on Linux from:

- Genesys Administrator
- A console window

Start

- You can stop the server from Genesys Administrator.
 1. Navigate to **PROVISIONING > Environment > Applications**.
 2. Select the Knowledge Center CMS.
 3. Click **Stop applications** in the **Runtime** panel.
- Or you can stop the server from the console window where it was started.

1. Press Ctrl+C while the window is active.
 2. Type Y and press Enter.
- Or you could use provided script server.sh:
 1. Navigate to the Genesys Knowledge Center CMS installation directory in the Unix command console.
 2. Go to server directory
 3. Type and execute server.sh with parameter "stop" (for example: server.sh stop)

End

The Genesys Knowledge Center CMS is shown in Stopped status in Genesys Administrator.