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Genesys Knowledge Center Quick Start Guide

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4/7/2025

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Welcome to the Genesys Knowledge Center Quick Start Guide. This guide will help you get Genesys Knowledge Center up and running quickly by installing and working with the sample knowledge base.

Overview

The fastest way to get started with Knowledge Center is to create a sample knowledge base and try it out. After you install Knowledge Center Server, you can find the sample knowledge base in the `<Knowledge Center Server Installation Folder>\server\tools\indexer` folder. At that point, you can create a new knowledge base in Genesys Administrator or Knowledge Center CMS and import documents into it using the tool shipped with the Knowledge Center Server. After these steps, you are ready to work with the basic features of Knowledge Center .

For a more in-depth overview of Knowledge Center, you can read the [Knowledge Center Components](#) topic in the Deployment Guide.

Setting up your Knowledge Center

Start

1. Review the [prerequisites](#) and make sure your Genesys environment meets the requirements.
2. [Define language code](#) ("language/code=en") for the English business attribute value of Language business attribute.
Note: you can skip this step when installing 8.5.303.xx or higher version of the product. The English language will be checked and modified by the provisioning tool during installation.
3. [Configure Knowledge Center Cluster](#).

Important

Please specify the planned host and port for the Knowledge Center Server as the host and default port of the Knowledge Center Cluster. This allows the system to work without the load-balancer.

4. [Configure the Knowledge Center Server applications and install the server nodes](#) (first 4 steps of that procedure).
5. (for 8.5.302.xx and earlier) [Install the Knowledge Center Plugin for Administrator](#).
6. (for 8.5.302.xx and earlier) Create your first knowledge base by following **[+] these steps**

1. Login into Genesys Administrator with the newly created agent
2. Go to **Administration > Knowledge Center**
3. Follow the steps of [Selecting Knowledge Center Cluster Application](#) and select the cluster application created in step 2.
4. Follow the steps of [Creating a Knowledge Base instruction](#) procedure. On step 1, enter the following information:
 - **ID:** knowledgefaq
 - **Name:** Knowledge Center FAQ
 - **Description:** Most common question regarding Genesys Knowledge Center
 - Ensure that **Knowledge base is active** and **Knowledge base is public** are checked
 - Add English language to your Knowledge Base.
7. Install [Knowledge Center CMS](#).
8. Create agent that will be used to work with the knowledge by following **[+] these steps**.
 1. In Genesys Administrator go to **Provisioning > Accounts > Users**
 2. Press the **New** button
 3. On the **General** tab enter *knowledge* as the **user name** and *employee ID* of the **agent**
 4. Press the **Save and Close** button
 5. In Genesys Administrator go to **Provisioning > Accounts > Roles**
 6. Press the **New** button in menu to create new role
 7. On the **General** tab enter *Knowledge Workers* in the **Name** field
 8. Go to the **Assigned Privileges** tab
 9. On the **Role Privileges** tab, check “*Genesys Knowledge*” product and add the following privileges:
 - Allows agent to change data in a knowledge base
 - Allows agent to manage knowledge bases
 - Allows agent to use reporting capabilities
 10. Go to the **Configuration** tab
 11. Add *agent knowledge* to the role
 12. Press the **Save and Close** button
9. (for 8.5.303.xx and after) Create agent that will be used to work with the Knowledge Center CMS by following **[+] these steps**.
 1. In Genesys Administrator go to **Provisioning > Accounts > Users**
 2. Press the **New** button
 3. On the **General** tab enter *cms_administrator* as the **user name** and **employee ID** of the agent
 4. On **Member Of** tab click the **Add** button and select **Administrators Access Group**, then click **OK**

5. Press the **Save and Close** button
 6. In **Genesys Administrator** go to **Provisioning > Accounts > Roles**
 7. Click the **New** button in the menu to create a new role
 8. On the **General** tab enter *Knowledge CMS Administrators* in the **Name** field
 9. Go to the **Assigned Privileges** tab
 10. On the **Role Privileges** tab, check **Genesys Knowledge Center CMS** product and add the following privileges:
 - Administrator (allow user to carry out Administrator tasks)
 11. Go to the **Configuration** tab
 12. Add agent *cms_administrator* to the **role**
 13. Press the **Save and Close** button
10. Start your Knowledge Center CMS instance:
- To start your servers from Genesys Administrator follow **[+] these steps**
 - 1. Navigate to **Provisioning > Environment > Applications**.
 - 2. Select the **Genesys Knowledge Center CMS** application.
 - 3. Click **Start applications** in the Runtime panel.
 - To start your servers using the provided start script (server.bat on Windows and server.sh on Linux) follow **[+] these steps**
 - 1. Navigate to **<Knowledge Center CMS Installation Folder>** and launch a console window.
 - 2. For Windows, type: `server.bat`
 - 3. For Linux, type: `server.sh`
11. (for 8.5.303.xx and after) Create your first knowledge base in Knowledge Center CMS by following **[+] these steps**
1. Login into Knowledge Center CMS with the *cms_administrator* agent
 2. Follow the steps of [Creating a Knowledge Base in CMS](#) instruction procedure. Apply the next configuration:
 - ID: `knowledgefaq`
 - Name: Knowledge Center FAQ
 - Description: Most common question regarding Genesys Knowledge Center
 - Ensure that Active and Public switchers active for Knowledge base
 - Select Content source: Third-party using appropriate switcher
 - Add English language to your Knowledge Base
12. Start your knowledge Center Server instance:
- To start your servers from Genesys Administrator follow **[+] these steps**
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 1. Navigate to **Provisioning > Environment > Applications**.
 2. Select the **Genesys Knowledge Center Server** application.
 3. Click **Start applications** in the Runtime panel.
- To start your servers using the provided start script (server.bat on Windows and server.sh on Linux) follow **[+] these steps**
 - .
 1. Navigate to **<Knowledge Center Server Installation Folder>\server** and launch a console window.
 2. For Windows, type: `server.bat`
 3. For Linux, type: `server.sh`
- 13. Import first knowledge into your knowledge base by following **[+] these steps**
 - .
 1. In Windows Explorer, navigate to **<Knowledge Center Server Installation Path>\server\tools\indexer folder**
 2. In **importFAQ.bat** change [host] and [port] to the actual host and port that Knowledge Center Server runs on.
 3. Run **importFAQ.bat**

Important

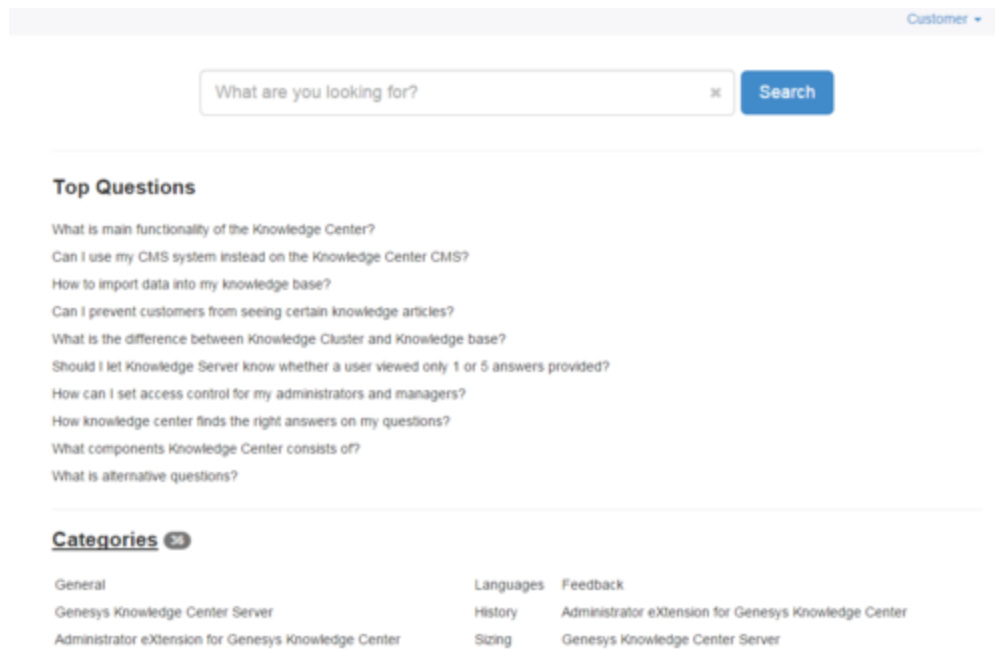
The example below imports **knowledgeFAQ.xml** that is shipped with Knowledge Center Server into the knowledge base named **knowledgefaq** on behalf of the agent named **knowledge**. The most recent version of the frequently asked questions is downloadable from [here](#).

End

Using the Sample UI

Congratulations! You are ready to use Genesys Knowledge Center. For sandbox testing, try using the Sample UI web application, whose components are available at:

- `http://host:port/gks-server`—The Knowledge Center Server
- `http://host:port/gks-sample-ui`—The Sample UI sandbox



Sample UI Main Questions

For more information on using the Sample UI, consult the [Deployment Guide](#).