

GENESYS[®]

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Genesys Knowledge Center User's Guide

Knowledge Center Plugin for Workspace Desktop Edition

4/8/2025

Knowledge Center Plugin for Workspace Desktop Edition

Integrating Knowledge Center with Workspace Desktop Edition

Overview

The Knowledge Center Plugin for Workspace Desktop Edition enables you to perform a number of tasks. Use the following guide to help you get the most out of your Knowledge Base:

1. Before you begin

- Select a Language
- Select a Knowledge Base
- Select a Channel

2. Getting started

- View recent customer questions
- Search for Answers in a Knowledge Base
- View attachments
- Copy Found Answers to a Reply
- Suggest answers for missing questions in knowledge base
- Provide feedback on an answer

3. Advanced features

- Statistics:
 - Review document data
- Browsing:
 - Browse the Knowledge Base using Categories
 - Browse a customer's search history
- Favorites:
 - Browse Favorites
 - Add and remove Favorites
 - Browse Favorites by category

- Copy content to your interaction
- My Documents:
 - Browse My Documents
 - Pending status
 - Accepted status
 - Rejected status

Important

To work with Knowledge Center plugin the agent must have **Knowledge.Worker** privileges.

Selecting a Language

| | () () | Ask Browse History |
|---|----------|---|
| | NTAC | What is Genesys Knowledge Center? |
| | - | All knowledge bases 🗸 All Channels 🗸 |
| (| | What Is Genesys Knowledge Center? The ultimate goal of Genesys Knowledge Center is to convert your knowledge into answers to the questions your clients or agents have. It delivers a set of components for administering, authoring, and Knowledge FAQ / General |
| | CO-BR | Related categories General |
| / | DWSE | No relevant results |
| | KNO | |

To select a language, click the language menu and choose your language from the list.

Selecting a Knowledge Base

| <u> </u> | • | Ask | Browse | History | |
|---------------|---------------|---|-----------------------------|----------------------------------|---|
| ■ (3) sion | CONTACT | What Is All know | Genesys Kno vledge bases | wledge Center | ? nels 🗸 |
| d the | \rightarrow | Ali know Genesys groupor Knowled | dge FAQ dge FAQ | nowledge enesys Kno eneral | e Center? bwledge Center is to convert your knowledge into answers to the questions your clients or age |
| | CO-BR | Relat General | ed catego | ries | |
| | OWSE | No rele | evant results | | |
| | KNOW | | | | |

By default, the Knowledge Base is set to **All knowledge bases** allowing you to search through all live Knowledge Bases at the same time. Should you wish to search a single Knowledge Base however, clicking on the Knowledge Base menu allows you to choose a specific Knowledge Base from the list.

Selecting a Channel

| | \ | |
|---|----------|--|
| | 0 | Ask Browse History |
| | CONTA | Ask a question |
| | CT | Knowledge FAQ All Channels |
| | | Customer's Recent questions |
| | | search |
| | | What reporting data is available in the Pulse plugin? |
| | | Can I use Genesys Knowledge Center as a virtual assistant? |
| | <u>-</u> | abra |
| | BO | How do I import data into my knowledge base? |
| | WSE | What Is Genesys Knowledge Center? |
| | , | Can I use Genesys Knowledge Center as a virtual assistant? |
| | | How should I ask questions? |
| | | How should I ask questions? |
| | | Can I use Genesys Knowledge Center as a virtual assistant? |
| Γ | | |

By default, Channels are set to **All Channels** allowing you to search through all Channels at the same time. Should you wish to search a single Channel however (for example, documents relating to Chat only), clicking on the Channels menu allows you to choose a specific Channel from the list.

Viewing Recent Customer Questions



Use the following procedure to view any recent customer questions:

- 1. Go to the **Ask** tab.
- 2. If there is no question asked, the system shows a list of the most recent customer questions.
- 3. For detailed knowledge on the customer's usage history please see Browsing Customer Search History

Searching for Answers in a Knowledge Base



Use the following procedure to search for answers in a Knowledge Base.

Prerequisites:

- The incoming interaction has been accepted.
- 1. Click the **Knowledge** tab.
- 2. Click the **Ask** tab.
- 3. Enter the search term and either click the **Search** button or press **Enter**.
- 4. Knowledge Center will provide the appropriate search results.

Viewing Attachments

| | <u>\$</u> - | |
|-------|-------------|--|
| | 0 | Ask Browse History |
| L (2) | CONTAC | How do I import data into my knowledge base? |
| vion | - | ← How do I import data into my knowledge base? |
| | | ● 2016-02-25 ④ 11 ★ 4.00 Channels: any |
| | | There are a number of ways to do this. If you have decided to use the Genesys Knowledge Center CMS there is an import action available for every knowledge knowledge directly into the Knowledge Center Server, you can use the Indexer tool that is shipped with the product (see the Indexer topic in the Deployment G |
| | | Lorem ipsum dolor sit amet.pdf |
| | CO-BR | □ Copy content ☆ Add to favorites |
| L | OWSE | Was this helpful? - Yes / No |

Use the following procedure to view any attachments that might have been added to the documents:

- 1. Click the question heading to expand the answer.
- 2. Click the appropriate attachment to open it in a new window.
- 3. To close the attachment, simply close the new window.

Copying Answers



Use the following procedure to copy answers into your interactions:

Prerequisites

- The incoming interaction has been accepted.
- 1. Click the **Knowledge** tab.

- 2. Click the **Ask** tab.
- 3. Enter the search term and either click the **Search** button or press **Enter**.
- 4. Click the question heading to expand the answer
- 5. Click the **Copy content** button.

Suggesting an answer

| 0 | ksk Browse History | en 🗸 |
|---------------|---|------|
| CONT | Genesys | × |
| ACT | inowledge FAQ V Chat V | |
| | low can I assign Genesys Knowledge Center Plugins to my agents? | |
| | o provide access to Genesys Knowledge Center functionality selectively to your agents, ensure that they have the Knowledge Worker role. Knowledge Center also supports other sets of privileges. For ex Ioles | |
| 6- <u>-</u> - | Vhat components are included in Genesys Knowledge Center? inowledge Center is made up of several elements, all of which work together to convert knowledge into answers. It includes the following components: - Knowledge Center Server – the heart of Genesys K ieneral | |
| BROWSE | Can I use Genesys Knowledge Center as a virtual assistant? ienesys Knowledge Center will be information source for virtual assistants. But it is not a virtual assistant itself. It can help an existing or 3rd Party virtual assistant find the best answer to a q ieneral | |
| / | Related categories Pereral Roles Roles | |
| No C | No relevant results | |
| | Compose an unsee | |
| L | Yes No *Question | |
| | Type your question | |
| | * Answer | |
| | Type your answer | |
| | Categories | |
| | Administrator for Genesys Kno | |
| | County da talor Feedback C General General C | |
| | Confirm Cancel | |

Use the following procedure to suggest an answer to the Knowledge Base:

Prerequisites

• The incoming interaction has been accepted.

Important

Only an agent that is granted authoring rights (with **Knowledge.AUTHOR** privilege) will have access to this functionality

- 1. Go to the Knowledge Center tab.
- 2. Open the **Ask** tab.
- 3. Enter the search term and either click the **Search** button or press **Enter**.
- 4. Click **No relevant results** button.
- 5. Click **Yes** when asked "Do you want to compose the answer for the question?".
- 6. Compose the answer, set the appropriate categories, and submit the answer by clicking **Confirm**.
- 7. You can copy the new answer as a reply to the customer by clicking **Yes** when asked, "Do you want to send this answer to the customer?".
- 8. Once submitted, your suggested answer can be found under **My Documents** in the **Browse** tab at the top. From there you can view their current review status.

Providing Feedback

| | 0 | Ask | Browse | History | |
|------|-----------|--|---|--|--|
| (2) | CONTACT | How H | łow do l impor | t data into my kno | wledge base? |
| er?" | (| Home How of Keepin and in record Was th | / Search: Ho do I know ti ing your accou response to s s or other doo his helpful? – | How do I impo he information int information a specific requests cumentation. We Yes / No | ort data into my kn / How do I know the information you h n you have on file about me is accurate? Inccurate and up to date is very important. You have access to your account information through various means, such as s. If your account information is incomplete, inaccurate or not current, please call or write to us at the telephone number e will promptly update or correct any erroneous information. Please contact us if you have questions or feel that we have |
| | KNOWLEDGE | | Per | ter?" | Ask Browse History How How do I import data into my knowledge base? Home / Search: How How do I import data into my kn / How do I know the information you h How do I know the information you have on file about me is accurate? Keeping your account information accurate and up to date is very important. You have access to your account inform and in response to specific requests. If your account information is incomplete, inaccurate or not current, please call records or other documentation. We will promptly update or correct any erroneous information. Please contact us if y ☆☆☆☆ Please, leave a comment Submit No mment. If Copy content ☆ Add to favorites |

If the answer provided has been helpful, this is your chance to improve the knowledge base by providing feedback. Answering the question "Was this helpful" allows the system to better serve your future interactions by training the knowledge base to know which answers are the most suitable. Leaving a star-rating helps with overall reporting.

Use the following procedure to provide feedback on a document in the Knowledge Base from the **Ask** tab:

- 1. Answer Yes or No to the question, "Was this helpful?"
- 2. Give the current answer a star rating of your choice.
- 3. Type your feedback in the field provided and click **Submit**.

Use the following procedure to provide feedback on a document in the Knowledge Base from the

Browse tab:

- 1. Give the current answer a star rating of your choice.
- 2. Type your feedback in the field provided and click **Submit**.

Browsing the Knowledge Base using Categories (8.5.302.x and earlier)



Use the following procedure to browse the Knowledge Base using Categories:

- 1. From the **Browse** tab, click a category from the list.
- 2. Clicking a category opens all documents relating to that category.

Important

For information on copying answers, please see Copying Answers.

Browsing the Knowledge Base using Categories (8.5.303.x and higher)

| Senesys • Workspace | | | |
|--|----------|--|-------|
| 🛞 🚺 11 😁 00:00:10 🗠 💾 🊰 🖉 🔀 🖨 | C | <u>*</u> - | |
| Case Information | 0 | Ask Browse History | |
| Origin: Outbound email | <u>S</u> | | |
| ✓ 11 | OWLE | All documents V All knowledge bases V Email V | |
| From: mcr@gks-dep-stbl.emea.int.genesyslab.com | DGE | | _ |
| To test@g.com; Add Cc ▾ | | Demo: GBank | |
| Subject: | | ▲ 👔 Knowledge Center FAQ | - 1 |
| | | ✓ General (7) | - N - |
| English (United S 👻 👳 | | Configuration (5) | - N |
| | | Archiving (1) | - N |
| | 8 | Feedback (6) | - 1 |
| | NTA | | - 1 |
| | 9 | | |
| | | Administrator for Genesys Knowledge Center (4) | |
| | | ⊿ ■ Server | |
| | | Genesys Knowledge Center CMS (14) | |
| | | Genesys Knowledge Center Server (33) | _ |
| Dispositions Note | | Integration (3) | |
| | 22 | | |
| | ESP | | |
| | SNO | | |

Use the following procedure to browse the Knowledge Base using Categories:

- 1. From the Browse tab, click a category name from the tree of categories. Clicking the category name opens all documents relating to that category. The number near the category name indicates the number of documents in that category.
- 2. To view any child categories click the light triangle by the folder icon, next to the category name to expand it (clicking on the dark triangle closes the child categories).

Important

For information on copying answers, please see Copying Answers.

| | | < | | | |
|----------------|------------|-------------------|----------------|--------------------|--|
| urrent Session | ✓ ALL | ~) | | | |
| Date 🔺 | Туре | Knowledge base ID | Language | Query | |
| 6 days ago | SEARCH | knowledgefaq | en | What Is Genesys | Knowledge Center? |
| 6 days ago | SEARCH | knowledgefaq | en | Can I use Genesy | s Knowledge Center as a virtual assistant? |
| 6 days ago | Ask Brow | vse History |) | | |
| 6 days ago | 411.112-1 | | 5 — | | |
| 6 days ago | | ✓ ALL | Last 24 h | Last 7 days Last 3 | J deye All |
| 6 days ag | Date - | Туре | Knowledge base | ID Language | Query |
| 6 days a | 6 days ago | SEARCH | knowledgefaq | en | What Is Genesys Knowledge Center? |
| 6 days | 6 days ago | SEARCH | knowledgefaq | en | Can I use Genesys Knowledge Center as a virtual assistant? |
| 6 days | 6 days ago | SEARCH | knowledgefaq | en | Can I use Genesys Knowledge Center as a virtual assistant? |
| Detaile | 6 days ago | SEARCH | knowledgefaq | en | How should I ask questions? |
| | 6 days ago | OPEN | knowledgefaq | en | |
| - | 6 days ago | SEARCH | knowledgefaq | en | How should I ask questions? |
| Ę | 6 days ago | SEARCH | knowledgefaq | en | Can I use Genesys Knowledge Center as a virtual assistant? |
| Fi | 6 days ago | SEARCH | knowledgefaq | en | What Is Genesys Knowledge Center? |
| | 6 days ago | OPEN | knowledgefaq | en | |
| | | | | | |

Browsing Customer Search History

Use the following procedure to review the customer search history:

Prerequisites:

- The incoming interaction has been accepted.
- 1. Go to the **Knowledge Center** tab.
- 2. Open the **History** tab.
- 3. Browse either the customer's search history from the current session or the customer's entire search history (by choosing either **Current Session** or **All History** in the drop-down).
- 4. Filter the history events by type:

ALL - shows all events (you can define a date range here, if needed)
 SEARCH - shows the customer's search queries
 NO ANSWER - shows queries when the customer indicated that there was no answer found
 OPEN - shows documents that customer opened to view
 FEEDBACK - shows the customer's likes & dislikes

Important

When you select any line in the history table, the **Details** view is refreshed to show all

information on the selected event.

Browsing Favorites



The ability to save documents as **Favorites** makes it easy for you to quickly access information that you use frequently. Once you add a Favorite, you can perform a number of actions from the **Favorites** option, found under the **Browse** tab such as:

- remove documents from favorites
- browse favorite documents by category
- copy document content to your interaction
- see how many times the document has been viewed
- see the date of the last modification to the document

Adding and removing Favorites

| | Ask Browse History | |
|------|--|-----------------------------|
| | Genesys | |
| 9 | ← How can I assign Genesys Knowledge Center Plugins to my agents? | |
| | 2016-02-17 5 Channels: any To provide access to Genesys Knowledge Center functionality selectively to your agents, ensure that they have the Knowledge Worker role. | |
| | Desktop Edition can also be configured to provide access to the plugin | |
| | Copy contet ☆ Add to favorites | |
| CO-B | Was this helpful? - Yes / No Ask Browse History | |
| C. | ← How can Lassign Genesys Knowledge Center Plugins to my agents? | |
| | 2 2016-02-17 ● 6 Channels: any | |
| | To provide access to Genesys Knowledge Center functionality selectively to your agents, ensure that they he Desktop Edition can also be configured to provide access to the plugin | ave the Knowledge Worker ro |
| | G Copy conten | |
| | | |
| | Please, leave a comment | |
| | -BR P | |
| | | |

Adding and removing favorites is easy! With the click of a button, you have complete control over what documents are important to you.

To add content to your favorites, click **Add to favorites** within any document and it is automatically added to your **Favorites** found under the **Browse** tab for you to access at any time.

To remove a document from your favorites, click the **Browse** tab to navigate to your **Favorites** then click the question heading to expand the answer. From there you simply click **Remove from favorites** and the document is removed from your **Favorites**.

Browsing Favorites by category

| | Ask Browse History | |
|---------------------------------------|---|---|
| | Favorites V All knowledge bases V | |
| 9 | Can I use Genesys Knowledge Center as | a virtual assistant? |
| | Knowledge FAQ / General | urce for virtual assistants. Dut it is not a virtual assistant itsen, it can help an existing of 510 Party virtual assistant find the |
| | What components are included in Genesy | vs Knowledge Center? |
| - N | Knowledge Center is made up of several elements | s all of which work together to convert knowledge into answers. It includes the following components: - Knowledge Center 9 |
| | Knowledge FAQ / General | Ask Browse History |
| ß | How can I assign Genesis Knowledg | |
| i i i i i i i i i i i i i i i i i i i | To provide access to Genesys Kinwledge | Favorites V All knowledge bases V |
| ROWSE | Knowledge FAQ / Roles | General × 2 |
| | | Can I use Genesys Knowledge Center as a virtual assistant? |
| | | Genesys Knowledge Center will be information source for virtual assistants. But it is not a virtual assistant itself. It can be |
| | | Knowledge FAQ / General |
| | 1 | |
| | | What components are included in Genesys Knowledge Center? |
| | | Knowledge Center is made up of several elements, all of which work together to convert knowledge into answers. It incluc |
| | СО-ВРО | Knowledge FAQ / General |
| | | |

If your administrator has defined categories, you can use these to quickly jump to the right answer at the right time. Clicking on any of the categories helps narrow your search by only showing those documents that apply.

Reviewing document data

|) | Ask Browse History |
|-----------|---|
| SONTACT | Can I use Genesys Knowledge Center as a virtual assistant? 2016-02-17 |
| | 尾 Copy content ★ Remove from favorites |
| CO-BROWSE | Please, leave a comment |

If you are curious to know **1**-how current the document is, **2**-how many views a document has had, or **3**-how many times a document has been added to **Favorites** then simply look to the icons below the question heading for that useful information.

Browsing My Documents

| Ask Browse Hiktory |
|---|
| My documents V Knowledge FAQ V |
| An obcarrents Favorites My documents how many shards do I need to have per knowledge base? |
| It depends on the size of the data planned to be stored in knowledge base. The general recommendation is to divide planned size of your data in one language version (in Sizing |
| how many replicas to I need per knowledge base? |
| Replica is the way for us to have extra copies of the knowledge within the cluster. By default we are creating one replica for every knowledge base. Extra replicas can help Sizing , Genesys Knowledge Center Server |
| |
| |

The **My documents** option under the **Browse** tab gives you the ability to browse all the documents you authored in the Knowledge Base and verify their current status. From **My Documents** you can can view all the documents you made suggestions to which are sorted by their creation date, and view where they are in the review cycle such as:

- Pending
- Accepted
- Rejected

The default view in **My Documents** is **Pending** however clicking on the status menu allows you to choose from the list of statuses.

Important

Only an agent that is granted authoring rights (with **Knowledge.AUTHOR** privilege) will have access to this functionality

Pending status



When you click **My Documents**, you're immediate view is of all your documents that are waiting for approval from your Knowledge Base Administrator. This is the default view.

From this view you can:

- browse documents by category (if your Administrator has defined Categories)
- copy document content for use in your interaction

Accepted status

| | 9 | Ast Browse History |
|---|------|--|
| | | My documents 🗸 Knowledge FAQ |
| / | CT | Accepted V |
| | | Accepted checking Center Clusters do I need to set up in my environment? |
| | | Rejected explored and the second seco |
| | | Sizing , Genesys Knowledge Center Server |
| | | How many knowledge bases do I need? 🗸 |
| | | It depends on your specific needs and organization structure. Knowledge base is the way to collecting together documents of the same typ Sizing , Genesys Knowledge Center Server |
| | D-BR | Do I need to index attachments? ~ |
| | Ŵ | In most cases indexing attachments (especially for FAQ) is the bad idea. Adding too much content as the attachments will degradate the q |
| 1 | SE | Genesys Knowledge Center Server |
| | | |
| ľ | | |

From the status menu, choose **Accepted** to see all the documents you've authored in the Knowledge Base that are approved by your Knowledge Base Administrator.

When viewing the **Accepted** status, you can also:

- browse documents by category (if your Administrator has defined Categories)
- add documents to your Favorites tab
- remove documents from your Favorites tab
- copy document content for use in your interaction
- view and hide your original document submission

Rejected status

| P | Ask Browse History |
|-----|--|
| | My documents 🗸 Knowledge FAQ 🗸 |
| C1 | Rejected V |
| (| Accepted shards do need to have per knowledge base? |
| | Rejected size of the data planned to be stored in knowledge base. The general recommendation is to divide planned size of your data in one langua |
| | Sizing |
| | how many replicas to I need per knowledge base? |
| | Replica is the way for us to have extra copies of the knowledge within the cluster. By default we are creating one replica for every knowledge base. Extra rep |
| 6 | Sizing, Genesys Knowledge Center Server |
| ĕ | |
| BRO | |
| S | |
| | |
| | |

From the status menu, choose **Rejected** to see all the documents you've authored in the Knowledge Base that are not approved by your Knowledge Base Administrator.

When viewing the Rejected status, you can also:

• browse documents by category (if your Administrator has defined Categories)