Genesys Knowledge Center User's Guide

Knowledge Center Plugin for Workspace Desktop Edition

4/8/2025

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Integrating Knowledge Center with Workspace Desktop Edition

Overview

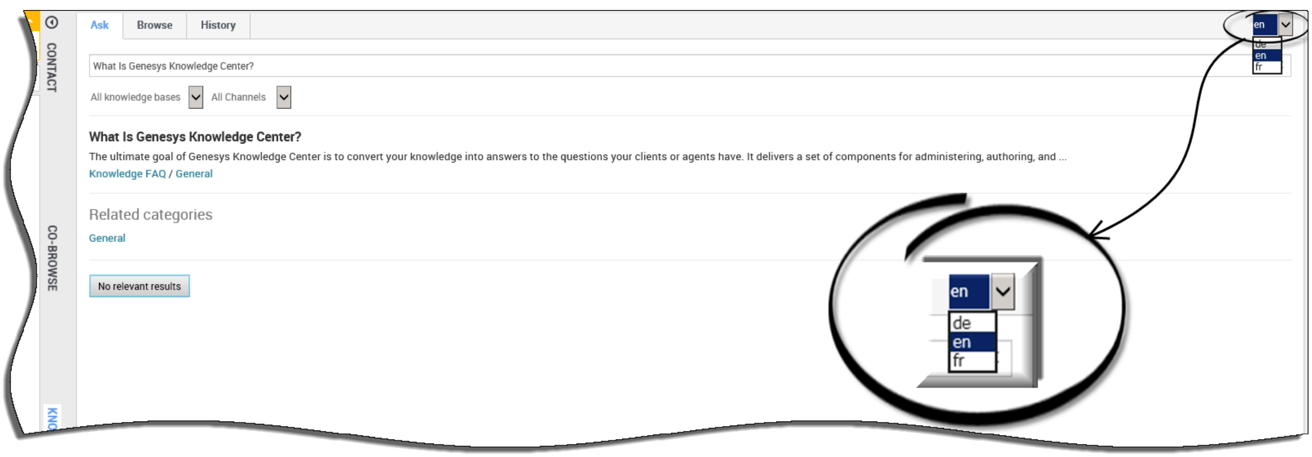
The Knowledge Center Plugin for Workspace Desktop Edition enables you to perform a number of tasks. Use the following guide to help you get the most out of your Knowledge Base:

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

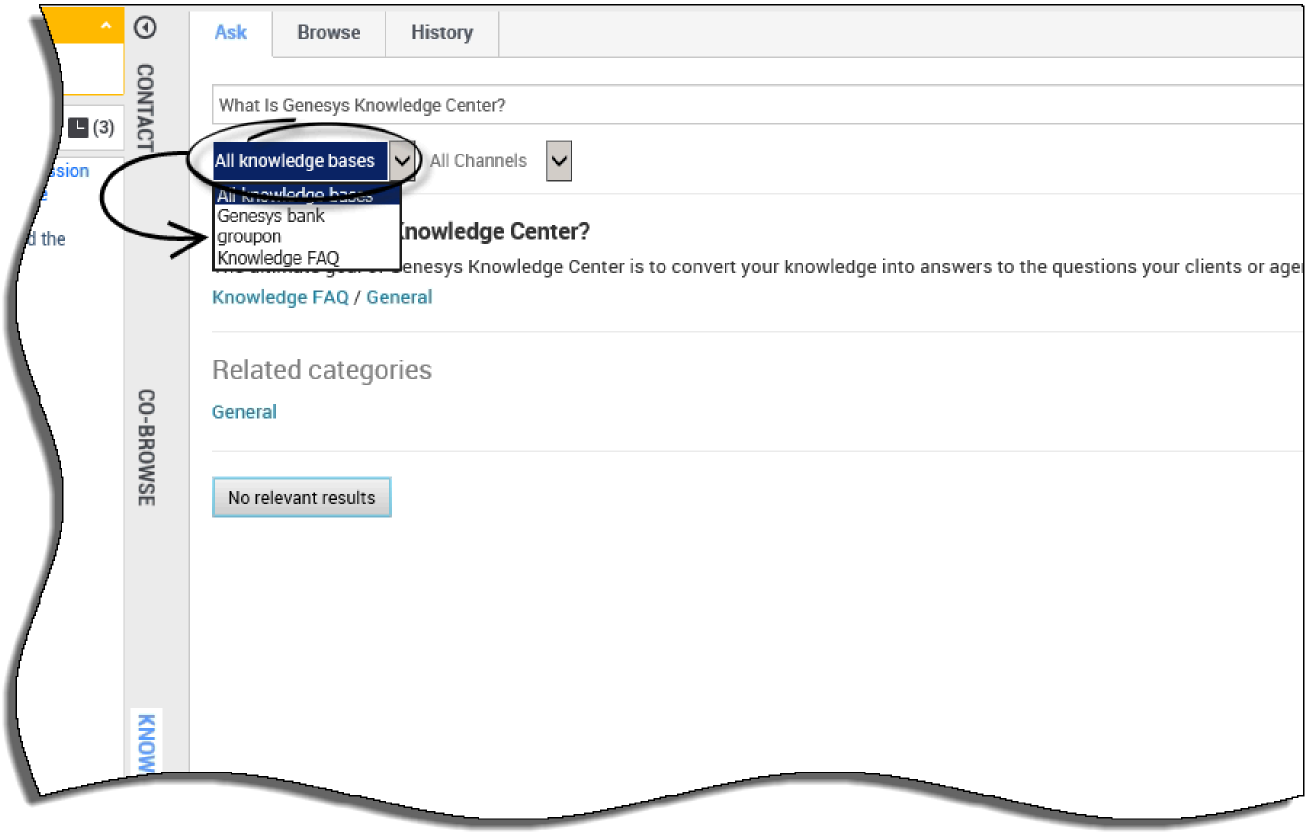
> **Important**
> To work with Knowledge Center plugin the agent must have **Knowledge.Worker** privileges.

Selecting a Language



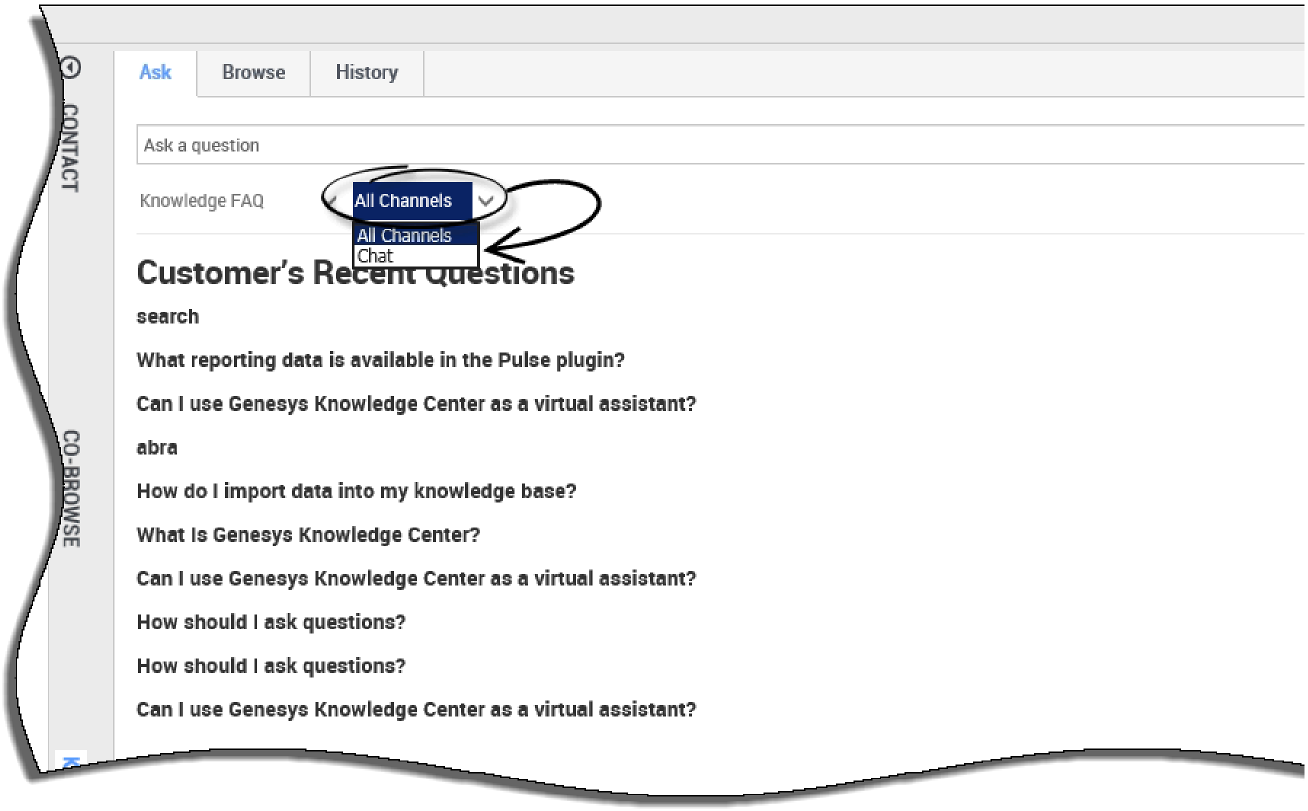
To select a language, click the language menu and choose your language from the list.

Selecting a Knowledge Base



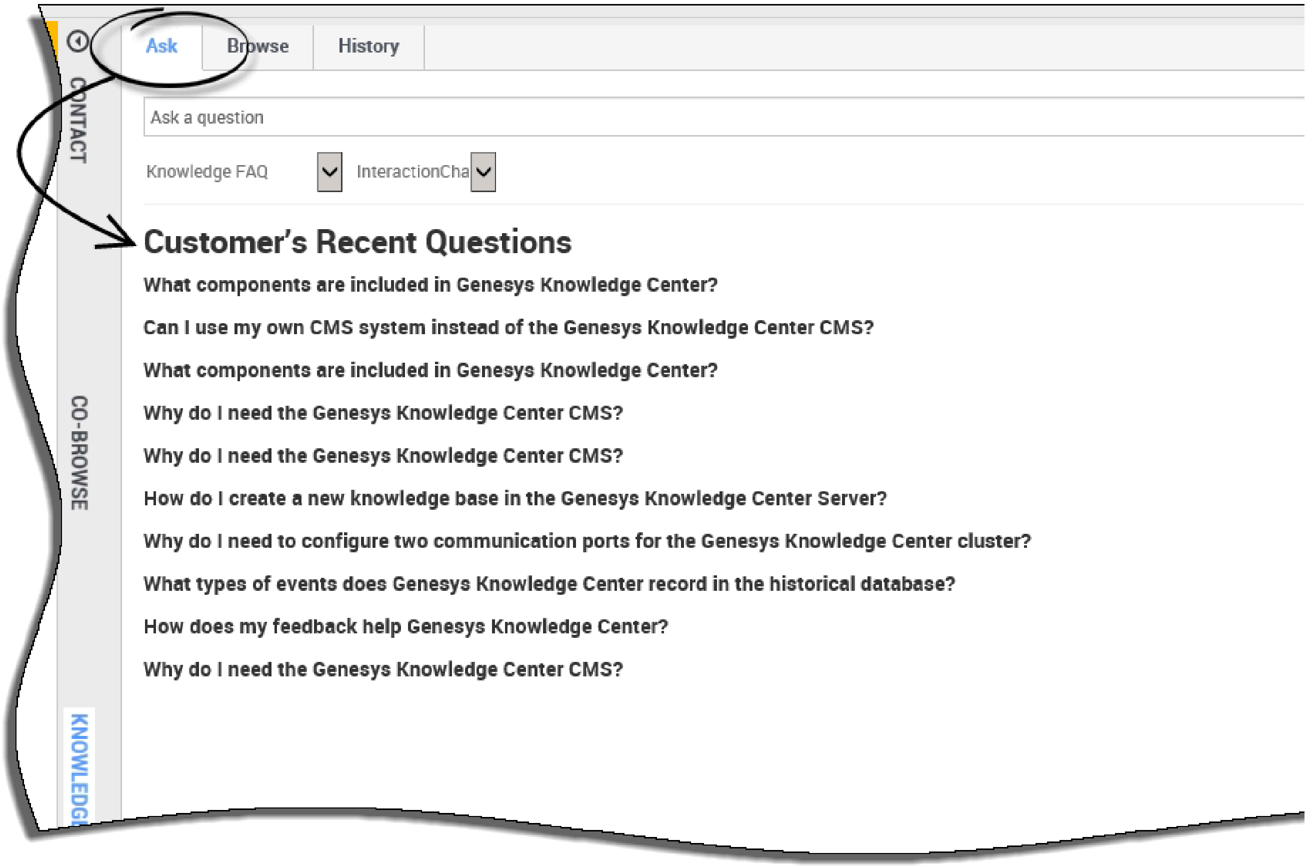
By default, the Knowledge Base is set to **All knowledge bases** allowing you to search through all live Knowledge Bases at the same time. Should you wish to search a single Knowledge Base however, clicking on the Knowledge Base menu allows you to choose a specific Knowledge Base from the list.

Selecting a Channel



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.

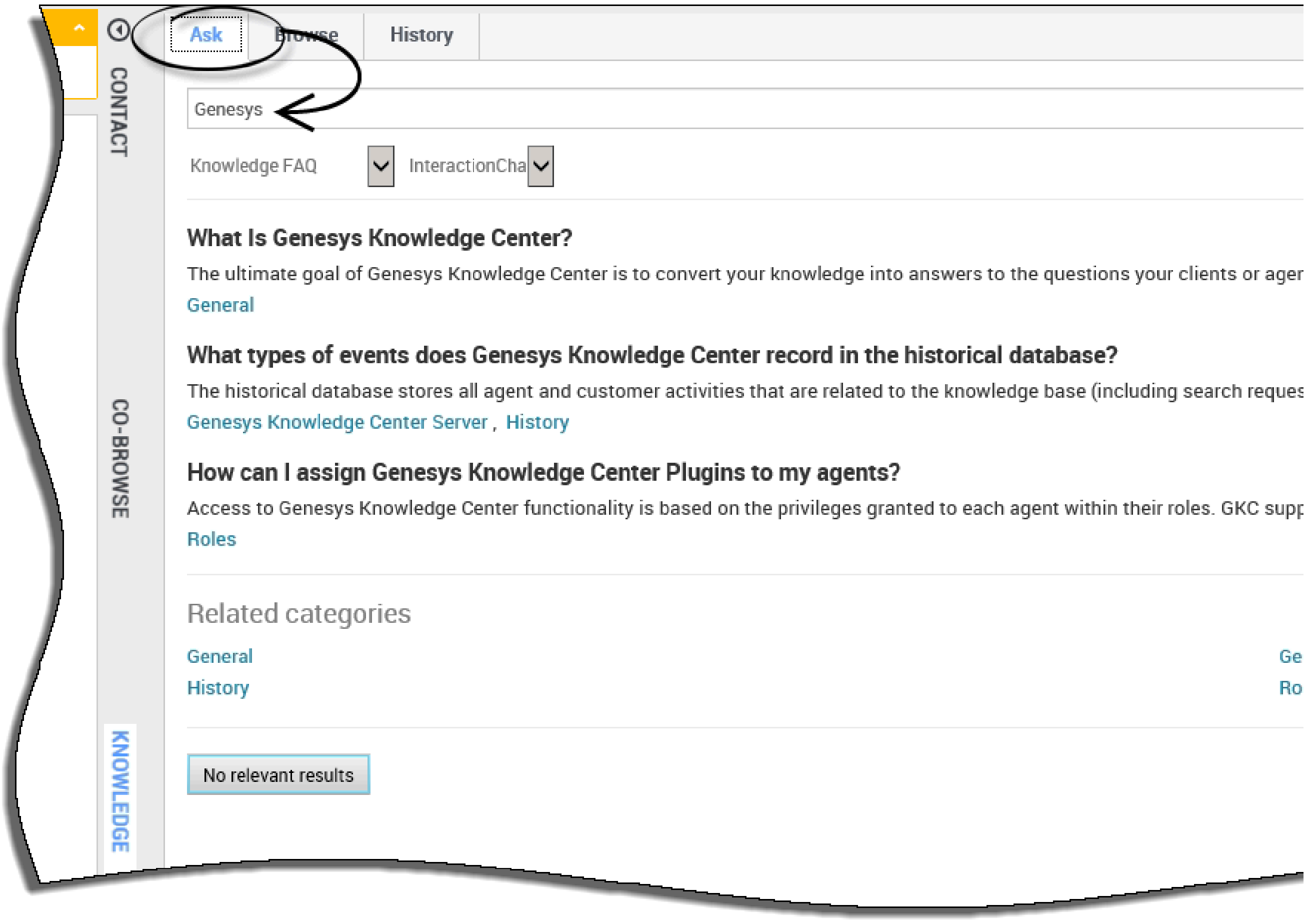
Viewing Recent Customer Questions



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



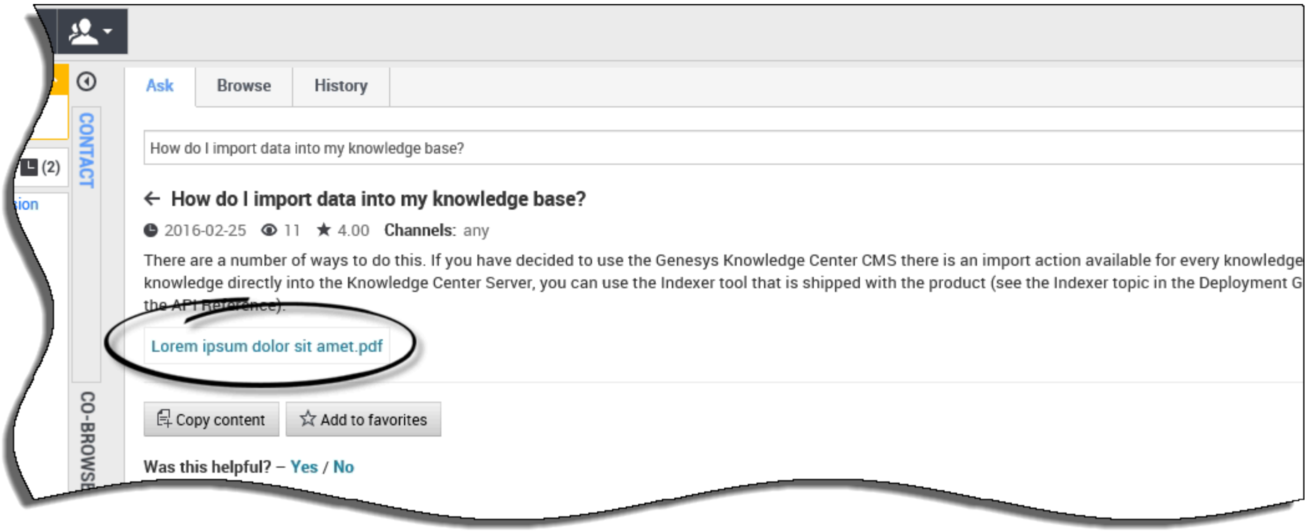
Use the following procedure to search for answers in a Knowledge Base.

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.

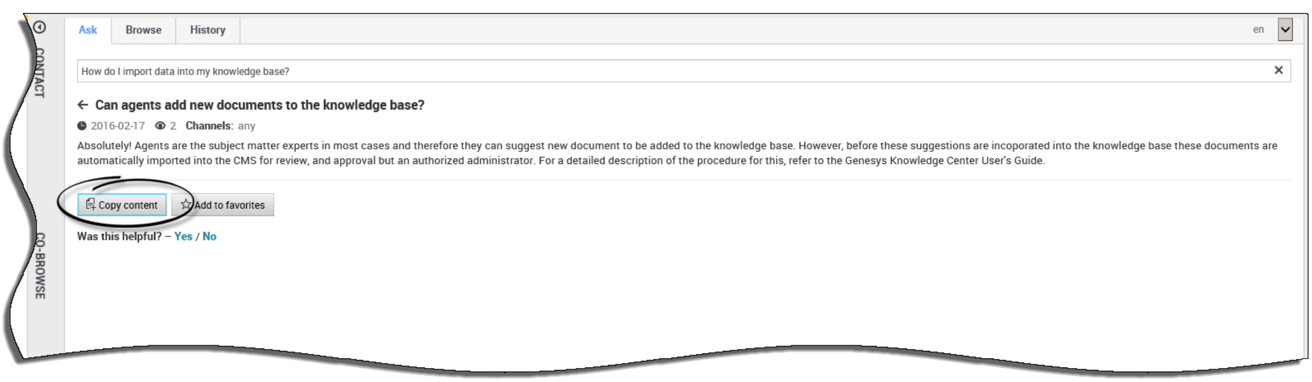
Viewing Attachments



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:

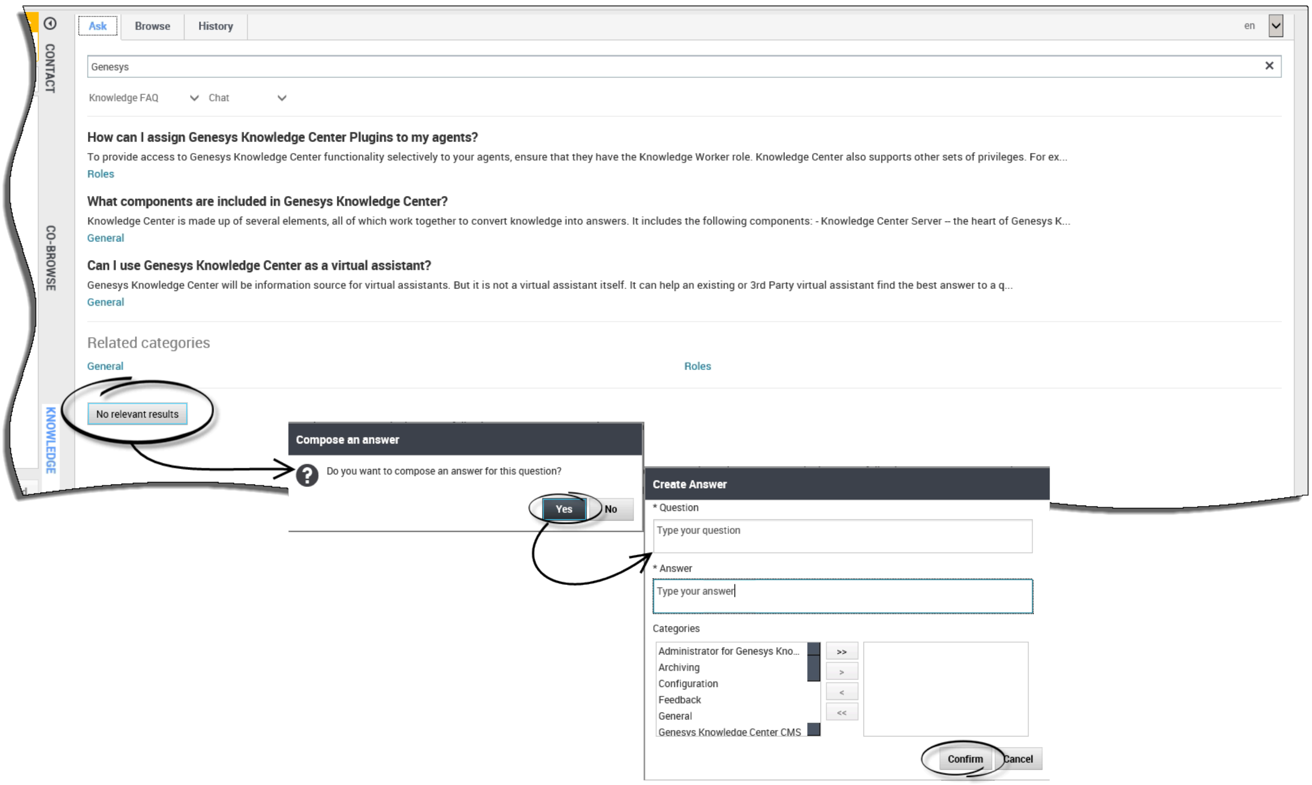
Prerequisites

- 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



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

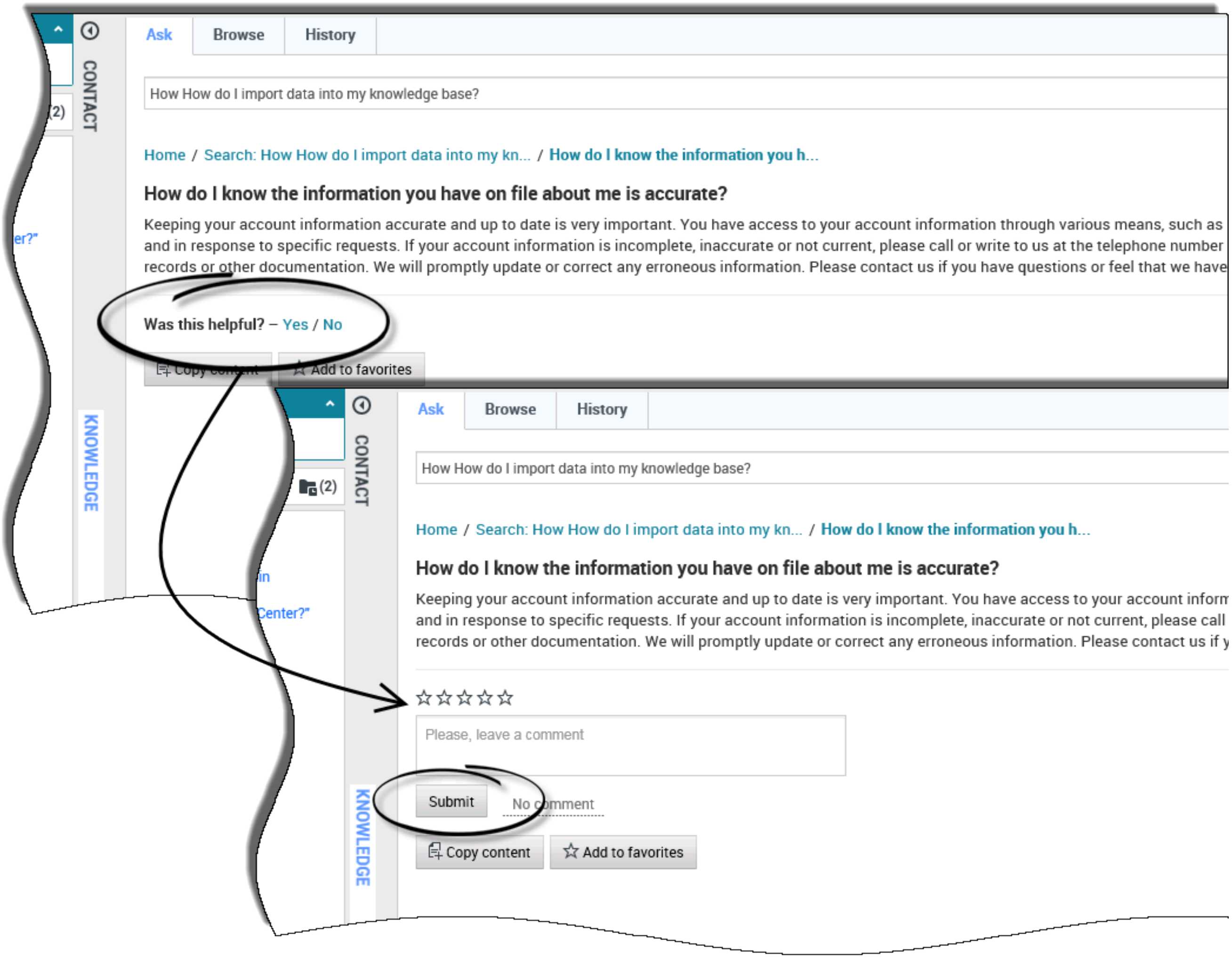
Prerequisites

- 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



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:

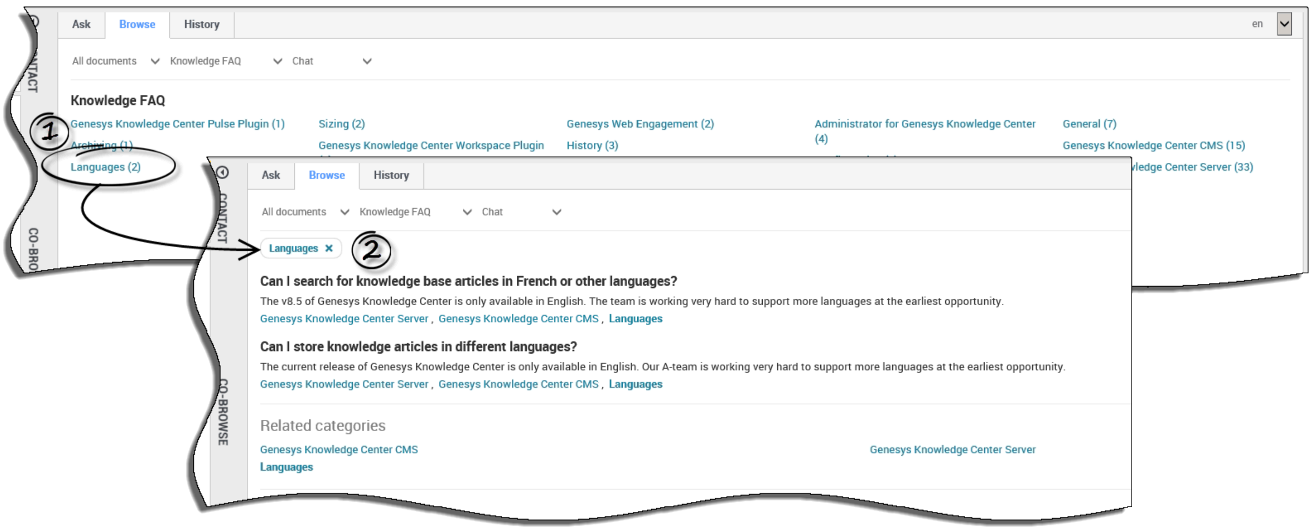
1. Answer **Yes** or **No** to the question, "Was this helpful?"
2. Give the current answer a star rating of your choice.
3. Type your feedback in the field provided and click **Submit**.

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)

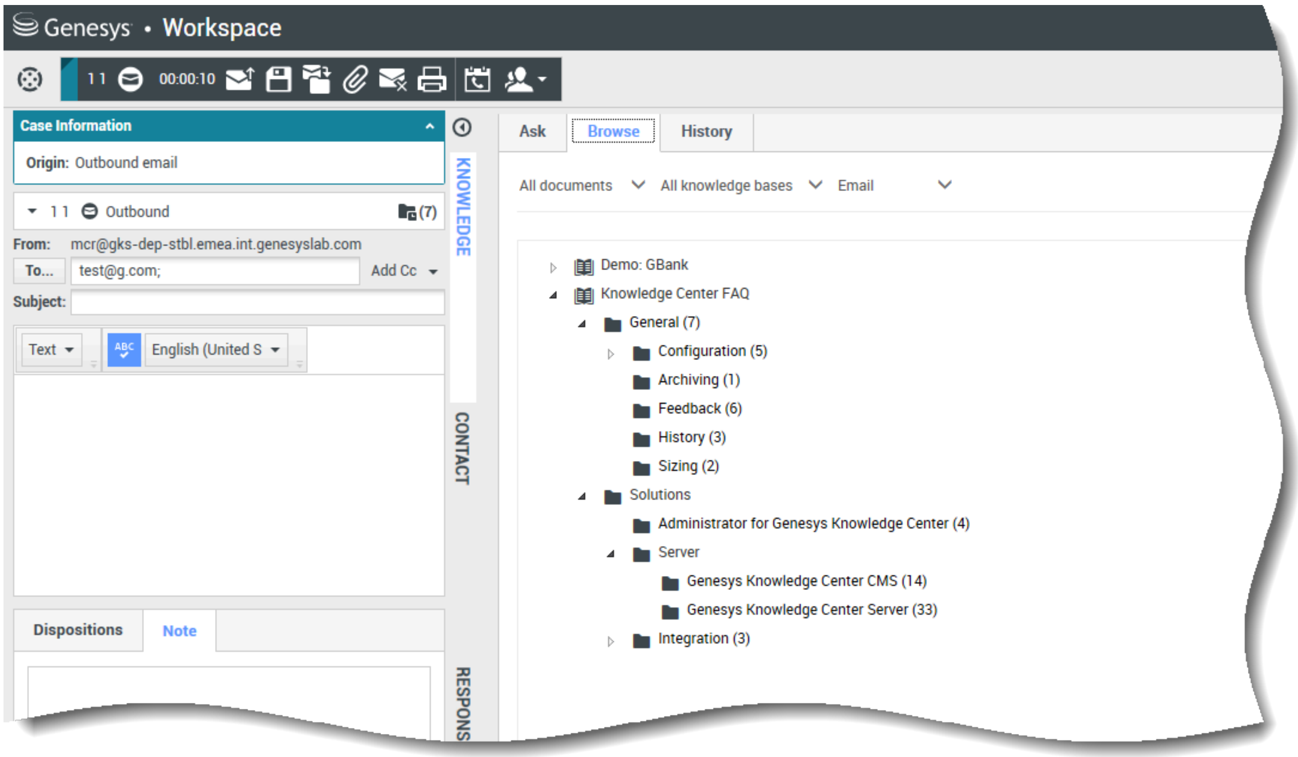


Use the following procedure to browse the Knowledge Base using Categories:

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)



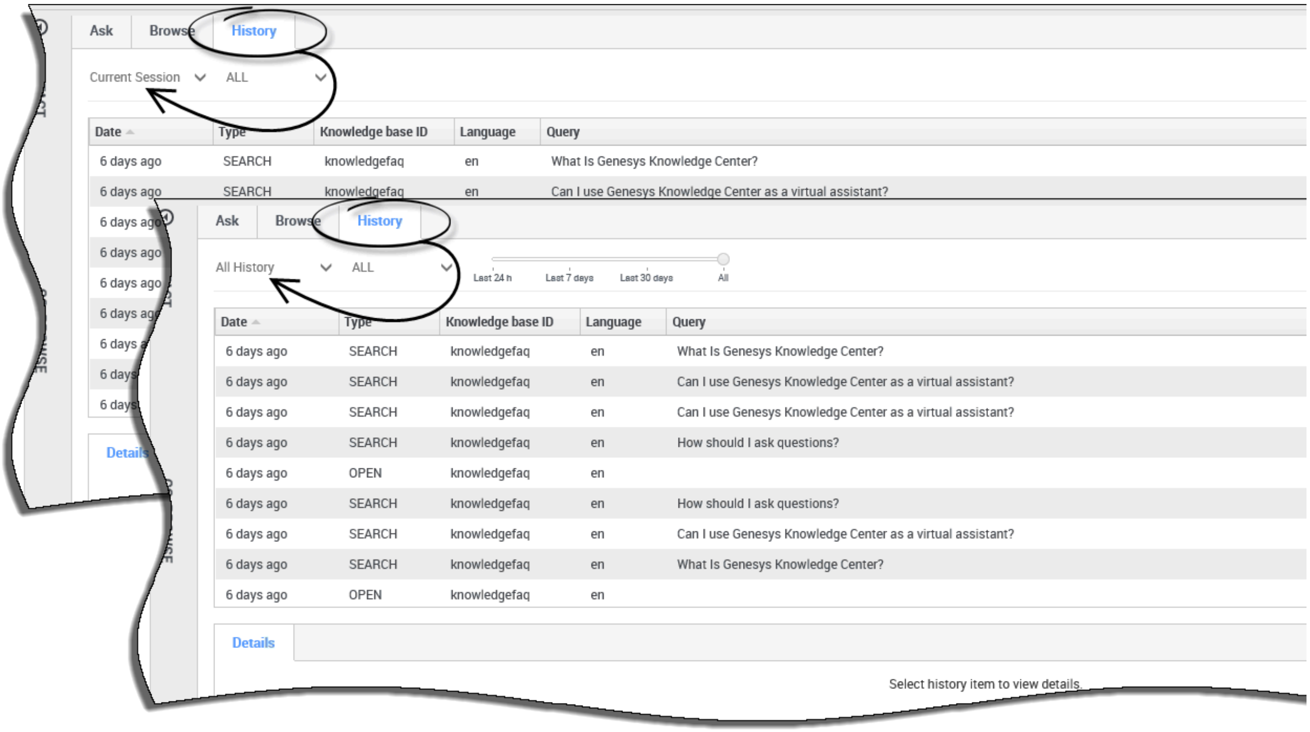
Use the following procedure to browse the Knowledge Base using Categories:

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.

Browsing Customer Search History



Use the following procedure to review the customer search history:

Prerequisites:

- The incoming interaction has been accepted.

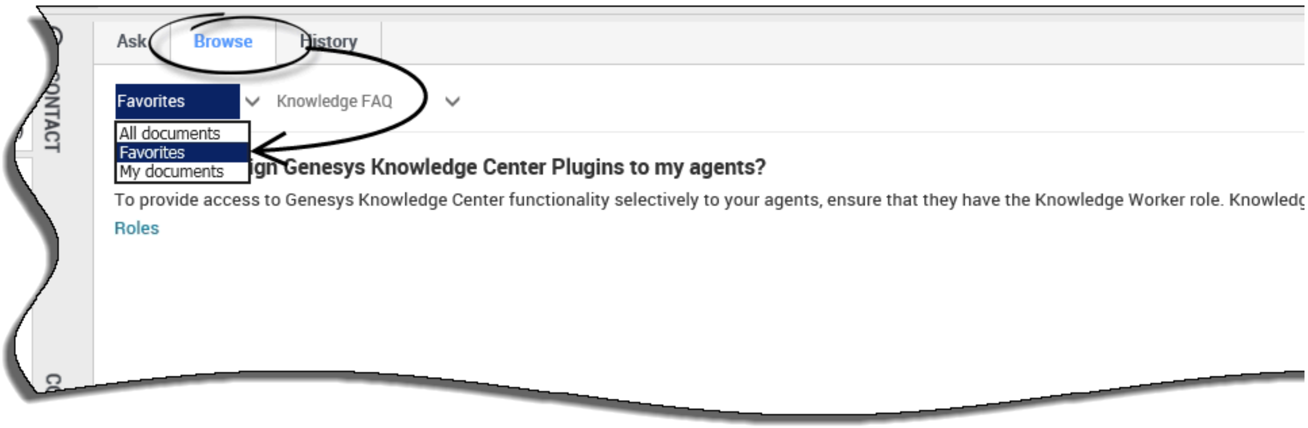
1. Go to the **Knowledge Center** tab.
2. Open the **History** tab.
3. Browse either the customer's search history from the current session or the customer's entire search history (by choosing either **Current Session** or **All History** in the drop-down).
4. Filter the history events by type:

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.

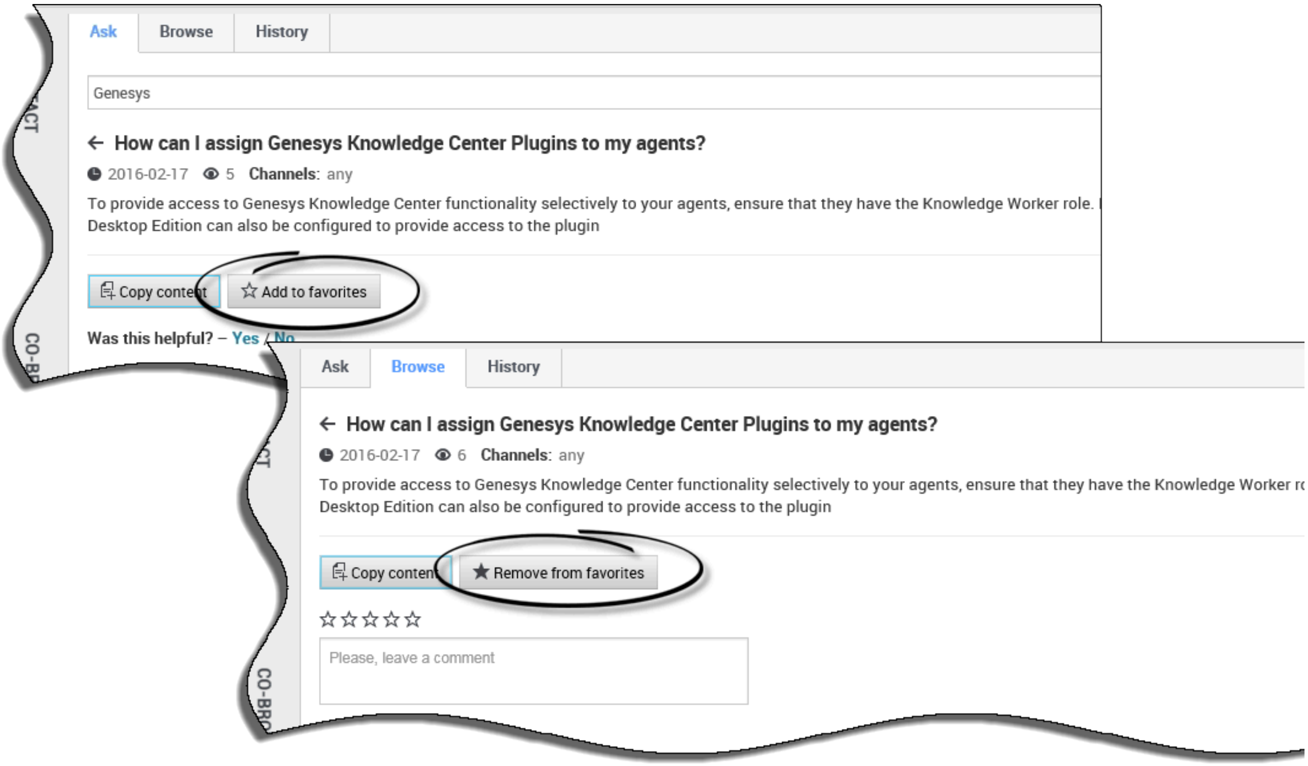
Browsing Favorites



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

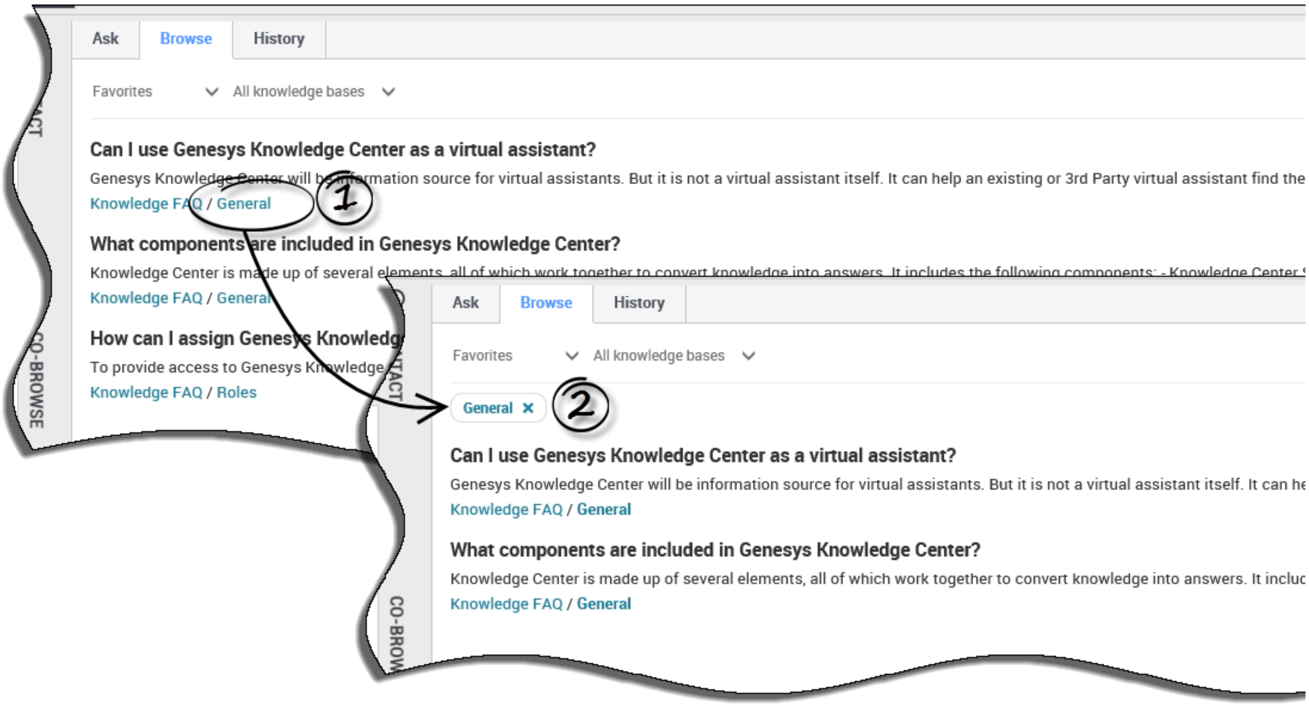


Adding and removing favorites is easy! With the click of a button, you have complete control over what documents are important to you.

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.

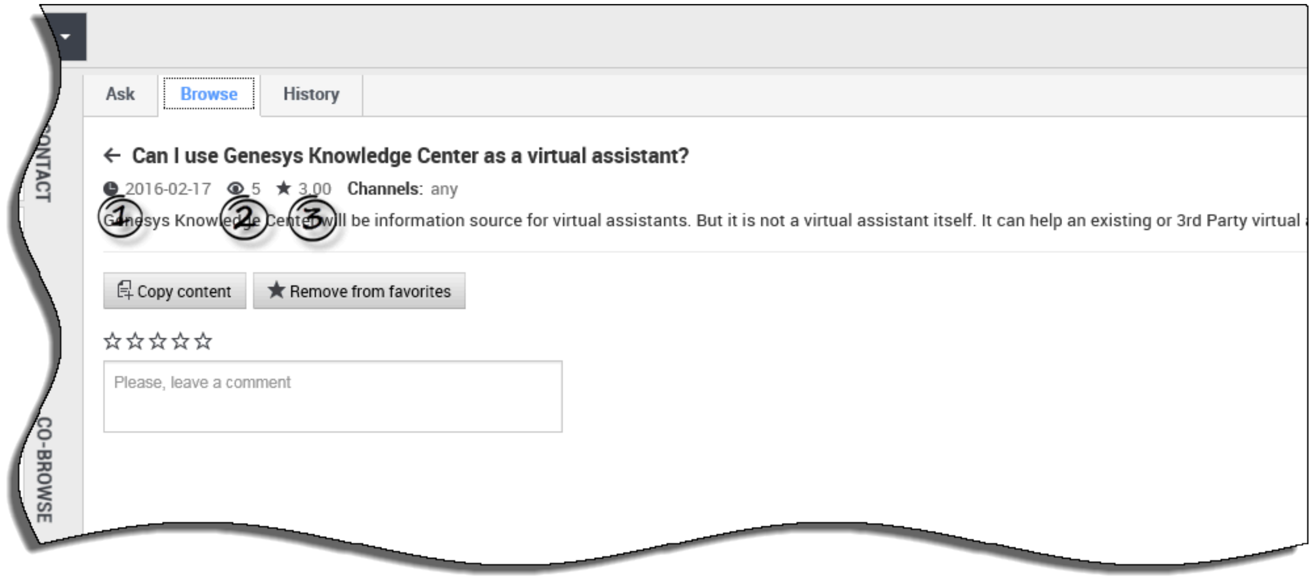
To remove a document from your favorites, click the **Browse** tab to navigate to your **Favorites** then click the question heading to expand the answer. From there you simply click **Remove from favorites** and the document is removed from your **Favorites**.

Browsing Favorites by category



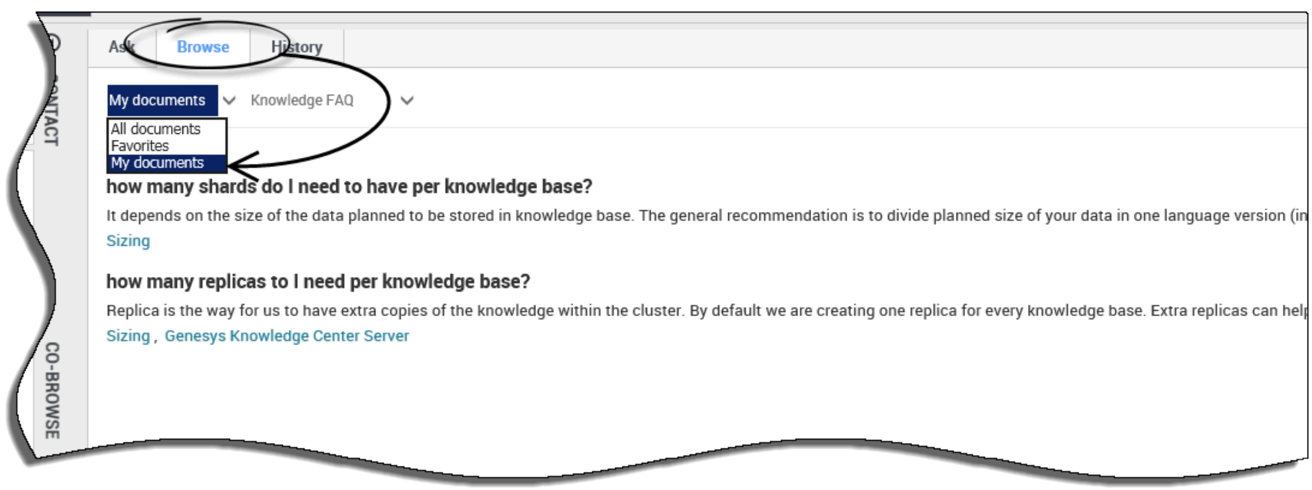
If your administrator has defined categories, you can use these to quickly jump to the right answer at the right time. Clicking on any of the categories helps narrow your search by only showing those documents that apply.

Reviewing document data



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



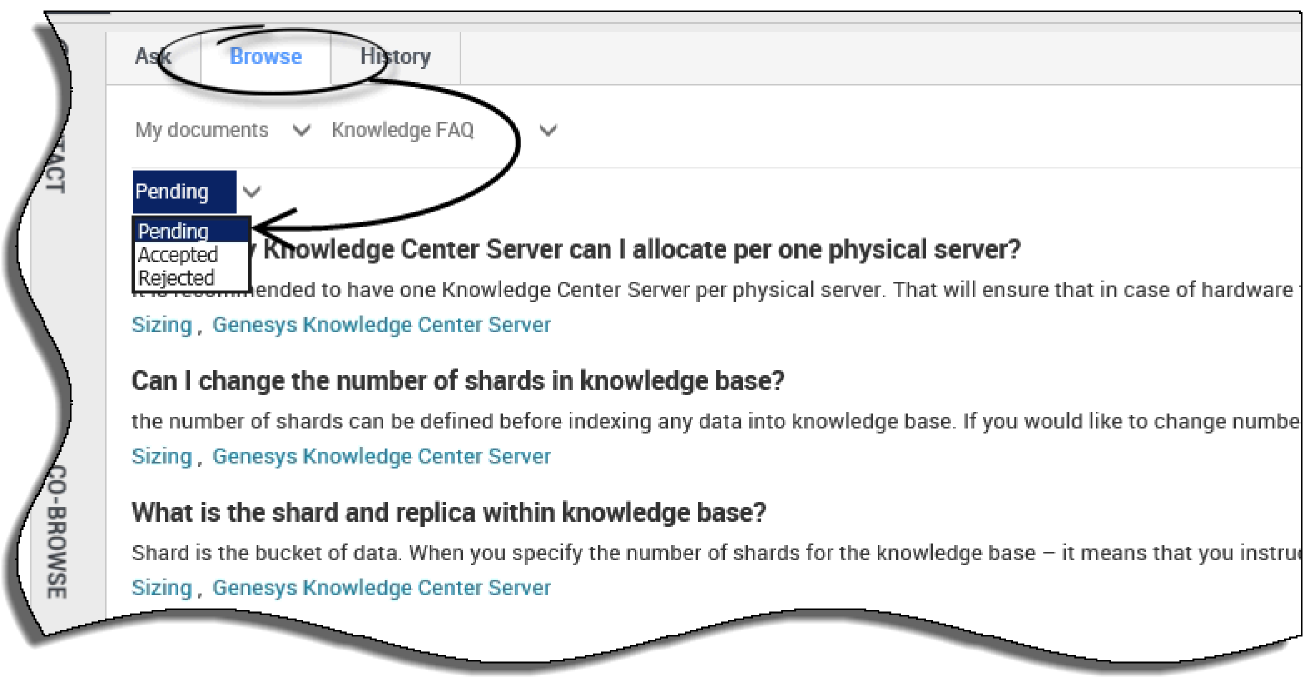
The **My documents** option under the **Browse** tab gives you the ability to browse all the documents you authored in the Knowledge Base and verify their current status. From **My Documents** you can can view all the documents you made suggestions to which are sorted by their creation date, and view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

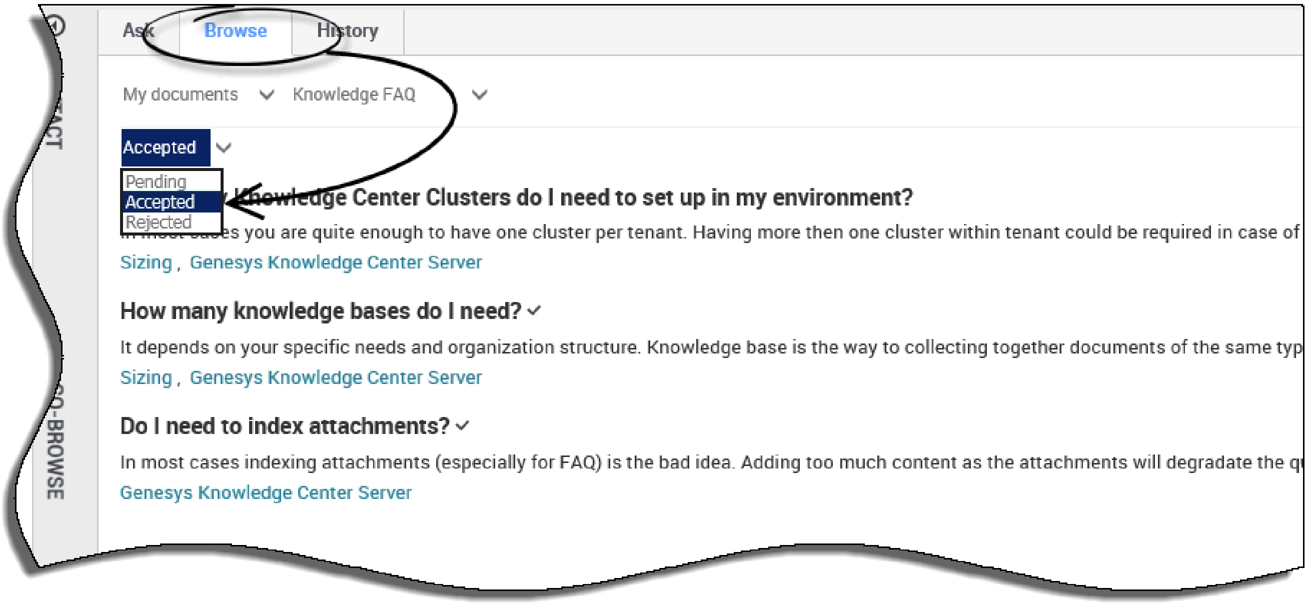


When you click **My Documents**, you're immediate view is of all your documents that are waiting for approval from your Knowledge Base Administrator. This is the default view.

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

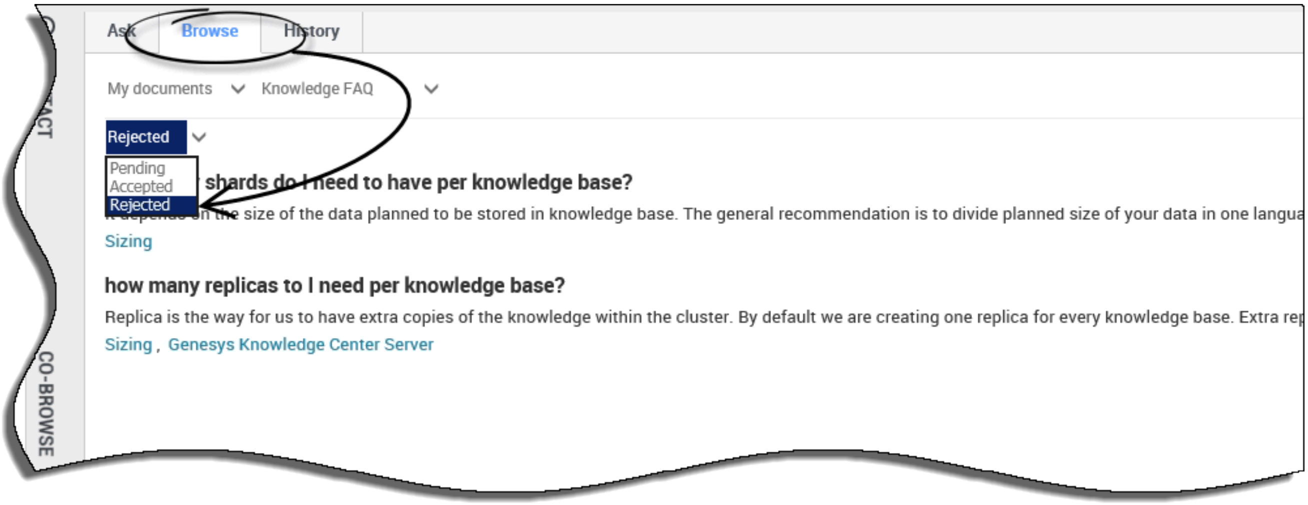


From the status menu, choose **Accepted** to see all the documents you've authored in the Knowledge Base that are approved by your Knowledge Base Administrator.

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



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)