

GENESYS[®]

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Genesys Knowledge Center User's Guide

Knowledge Center 8.5.3

1/4/2022

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Genesys Knowledge Center Help

Welcome to the *Genesys Knowledge Center Help*. This document provides procedures and instructions for common tasks you need to perform when administering, authoring, and using the knowledge that Genesys Knowledge Center provides. See the summary of chapters below.

Agent Assisted Knowledge	Authoring
Working with Knowledge Center Plugin for	Learn how to use Knowledge Center
Genesys Workspace Desktop Edition	Content Management System (CMS)
Knowledge Center Plugin for Workspace	Using the CMS
Desktop Edition	Using the CMS (8.5.302.xx and earlier)
Reporting Find information to help you understand reporting capabilities added to Pulse Using the Pulse Plugin	

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

^	•	Ask Browse History	
(3)	CONTACT	What Is Genesys Knowledge Center?	
d the	\rightarrow	Ali Knowledge backs Genesys bank groupon Knowledge FAQ enesys Knowledge Center is to convert your k Knowledge FAQ / General	nowledge into answers to the questions your clients or age
	CO-BR(Related categories General	
	OWSE	No relevant 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

	\						
	O CONTI	Ask Browse History					
		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?					
	CO-BRO	abra					
		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	k Browse History	en 🗸
CONT	nnesys	×
ACT	owiedge FAQ V Chat V	
	w can I assign Genesys Knowledge Center Plugins to my agents?	
(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	
8	hat components are included in Genesys Knowledge Center? owledge 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 neral	
BROWSE	in I use Genesys Knowledge Center as a virtual assistant? nesys 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 neral	
/	elated categories	
KNOWLE	No relevant results Compose an answer	
Ř	Do you want to compose an answer for this question?	
	Yes No *Question	
	Type your question	
	Answer	
	Type your answer	
	Categories	
	Administrator for Genesys Kno	
	Genesvs Knowledoe Center CMS	

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	low do l import	t data into my kno	owledge base?
er?"	bort data into my kn / How do I know the information you h on you have on file about me is accurate? accurate and up to date is very important. You have access to your account information through various means, such as ts. If your account information is incomplete, inaccurate or not current, please call or write to us at the telephone number te will promptly update or correct any erroneous information. Please contact us if you have questions or feel that we have				
KNOWLEDGE					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 comment 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.

		\leq			
urrent Session	V ALL	~)			
ate 🔺	Туре	Knowledge base ID	Language	Query	
6 days ago	SEARCH	knowledgefaq	en	What Is Genesys K	nowledge Center?
6 days ag <u>o</u>	SEARCH	knowledgefaq	en	Can I use Genesys	Knowledge Center as a virtual assistant?
5 days ago	Ask Brow	vse History			
6 days ago			Ś		
6 days ago		✓ ALL	Last 24 h	Last 7 days Last 30 d	aya Ali
6 days ag	Date 🔺	Туре	Knowledge base	D Language	Query
5 days a	6 days ago	SEARCH	knowledgefaq	en	What Is Genesys Knowledge Center?
5 days	6 days ago	SEARCH	knowledgefaq	en	Can I use Genesys Knowledge Center as a virtual assistant?
o dayst	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 content ☆ 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 0116-02-17 ● 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	
j m	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

1	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 🗸
CT	Rejected
(Pending Accepted shards do meed to have per knowledge base?
	Rejected shows 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 replica for every knowledge base.
6	Sizing, Genesys Knowledge Center Server
O-BROWS	
SE	

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)

Using the CMS (8.5.302.xx and earlier)

Important

You are looking at the documentation for an older version of the product. This page describes the CMS interface available in 8.5.302.xx and earlier versions (up to 8.5.300.xx).

If you are looking for the most recent user guide for CMS please refer to Using the CMS.

Overview

After logging in, you can use the Genesys Knowledge CMS to:

- Work with Knowledge Base (create, update, and delete knowledge bases)
- Work with Categories (assign categories to the documents in knowledge base)
- Work with Documents (create, update, and delete the contents of your knowledge bases by authoring questions and answers)
- Working with Multilingual Content
- Export Knowledge base to Knowledge Center Server
- Work with Customer Feedback

Important

Relations between Knowledge Center Cluster and Knowledge Center CMS:

- Knowledge Base definitions can be created in CMS and exported in Knowledge Center Cluster
- A new Knowledge Base can be activated only using GAX plugin
- Configurable options (Name, Description, Custom fields, attributes, Languages, Channels, Skills) can be exported from CMS to Knowledge Center Server
- Deleting the Knowledge Base in Knowledge Center Server does not affect the CMS
- Data can be Exported or Synchronized from CMS to Knowledge Center Server
- Deleting an article from the CMS also deletes it from Knowledge Center Server (after Synchronization)
- Making changes in Knowledge Center Server does not affect CMS

• Deleting the Knowledge Base in the CMS does not affect Knowledge Center Server (documents or KB will be not deleted)

Logging Into the CMS

Prerequisites

• A user with CMS privileges has been created in Config Server.

Start

Enter your username and password and press the **Log In** button.





End

Inside of the CMS

Homepage

When you log into the CMS you will end up on the home page:

is being trackly low Knowledge bases				and have a second of a second of
9	₽		۸	C?
Knowledge CME/FIG	Internationalization PAQ	Office Field	Kasaladge F#Q	Legal Documents
·))	-C	0		
General Documents	Administrator FIIQ			

The homepage contains following areas:

- 1. Top menu:
 - a. connection status to the Genesys Knowledge Center Server



Important

Connection to the Genesys Knowledge Center Server is required for the following operations:

- Export and synchronization
- Processing of the user feedback

These operations are unavailable if the connection status is shown as disconnected. All other operations can be used despite connection status.

b. the name of the logged in user with personalized menu



3. The main area contains the list of the knowledge bases you have in your CMS and provides the ability to

create a new knowledge base.

Inside of the knowledge base

When you navigate inside of a particular knowledge base, a few new elements are added:

Autor .	-	-	-	and the second	-	many i
have no solve with the local Link in the sector and the factor is deal			-			
Received an local sector						
Probable reported about the Transing for seconds, secting in France or Pforeit spec of a						
War to establish transfer						
Manuel De actual perduan artecet agines de perduguies plum de pomotiones an						
Windowing terror from tographiest affect the frances strategy						
We had being and characteries of the labor Mitter Presented						211010-0110-000
Non-can information by control from of incoments control of						ACR 10 (0.1) (0.1)
too in again a call ha conset						
toring his the application and delates promotively						819 10 10 10 10 10

- 1. The top menu now contains additional elements to navigate through the different areas of the knowledge base:
- Documents allows seeing the document within the knowledge base
- · Categories shows the category taxonomy associated with knowledge base
- Feedback allows retrieving information about the usage of the knowledge from Genesys Knowledge Center Server

Important

Please ensure that the CMS is connected with Genesys Knowledge Center Server to work with user feedback

- Modifications recently updated documents that are awaiting synchronization
- Main area contains following elements:
 - current location
 - toolbox panel includes (vary depending on the functionality of particular view)
 - · operations that is applicable to the currently selected elements
 - quick filters
 - language selector
 - · quick search functionality
 - Table pagination control
 - number of elements shown on the screen
 - navigation between data pages

Working with Knowledge Bases

Creating a New Knowledge Base

Prerequisites

• Knowledge.CMS.Administrator privileges have been assigned to the user.

Start

1. <u>Move your mouse over the + sign on the main page.</u>

Si Cenerys Knowledge Center	GRE duster: connected	1 kadmin +
Knowledge bases		0
Ð		
		(

2. Click "Create" link



3. The **Create Knowledge Base** window appears.

On the **General** tab:

- Enter the unique knowledge base ID (the ID should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters).
- Enter knowledge base name (maximum length of 50 characters).
- Enter the Document Type (FAQ or Article).
- (Optional) You can change the default icon assigned to the knowledge base.

General	Custom fields	Languages	Channels	Synchronization	Access	
* Knowledge Base ID						
* Knowledge Base Nan	Ne					
Knowledge Base Desc	iption					
-						
* Document type			Knowledge Base I	con		
						6

- 4. To add supported languages to Knowledge Base:
 - Click the Languages tab.
 - Move appropriate languages to the **Selected languages** list.
 - Select **Default language** from the list.

Create Kno	owledge Base					×
General	Custom fields	Languages	Synchronization	Access		
German Italian Spanish Other		4 4 4	English French		*	
Defailt language English						
Cancel					Confirm)



5. Your knowledge base has been created.

😺 Genesys Knowledge Center	GNC cluster: connected	± kadmin+
Knowledge bases		0
Ð		
Knowledge Center FAQ		

End

Deleting a Knowledge Base

Important

Deleting a Knowledge Base will delete all of the content in that Knowledge Base.

Prerequisites

- The knowledge base has been defined in the CMS.
- Knowledge.CMS.Administrator privileges have been assigned to the user.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click **Delete** and confirm the action in the dialog box.



End

Editing a Knowledge Base Definition

Prerequisites

- The knowledge base has been defined in the CMS.
- Knowledge.CMS.Administrator privileges have been assigned to the user.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click **Edit**.
- 3. The **Edit Knowledge Base** window appears.

General	Custom fields	Languages	Channels	Synchronization	Access	
Knowledge Base ID						
knowledgefaq						
* Knowledge Base Name						
Knowledge FAQ						
Knowledge Base Descriptio	an					
* Document type			Knowledge Base Icc	on		
EAO			Genesys			5

4. Press **Confirm** to save your changes.

End

Exporting Knowledge Base Configuration

Export of the knowledge base configuration can be useful for backup purposes and to duplicate configuration (via import) to another knowledge base.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page
- 2. Click the "settings" icon in the right bottom corner



3. From this menu select the **Backup configuration** item



4. Configuration file download will start

End

Defining Knowledge Base Availability

Use of skills provides the option of refining the data that agents see when they interact with Knowledge Center. Agents will only have access to Knowledge Bases that best match their skills when availability is assigned.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Edit.
- 3. The Edit Knowledge Base window appears.
- 4. Click the **Access** tab.
- 5. Select whether you would like knowledge base to be available for all of your agents or for only the agents that have one of the specified skills.

General	Custom fields	Languages	Channels	Synchronization	Access	
Skills	ss to knowledge base					
gka_user			>			-
ça day						
fromGAXskill			-			

6. Press **Confirm** to save your changes.

End

Importing Initial Documents

Prerequisites

- The knowledge base has been defined in the CMS.
- Knowledge.CMS.Document.Author or Knowledge.CMS.Category.Author privileges have been assigned to the user.
- Files being targeted for import are available in the appropriate format. For more information, please see Importing Data into the Knowledge Center Server

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.

Senesys Knowledge Center

Knowledge bases



- 2. Click Import data.
- 3. Choose Language of content
- 4. Browse to the appropriate XML file.



5. Click **Import**; your data is imported into the CMS.

End

Notify Knowledge Center Server about new Knowledge Base

Start
- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Settings icon in the bottom right corner of knowledge base area.
- 3. Select Export configuration from the menu

Knowledge bases



4. The confirmation window appears asking you to confirm that you would like to send the information about knowledge base to the Knowledge Center server.

	GKC cluster: cor	
	×	
Export knowledge base configuration		
Definition of the Knowledge FAQ will be exported to Knowledge Cluster.		
Note! In case if knowledge base with ID knowledgefaq already exists in the cluster - its configuration will be updated.		
Cancel Public	ish)

5. Click the **Publish** button.



End

Understanding Language Principles

Knowledge bases can contain content on different languages and their regional versions. You can define as many languages per knowledge base as required. Languages that will be available to be added to the knowledge base is defined by administrator in your environment, Terminology:

- Default language main language of the knowledge base. Default language cannot be changed as soon as the knowledge base definition has been saved.
- · Base language international version of the language that has regional versions
- Regional language region-specific version of the base language

Example:

- English is the base language in case if there are regional languages defined for it
- English (US) and English (UK) are regional versions of the English language

Editing List of Languages Within Knowledge Base

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Edit.
- 3. The Edit Knowledge Base window appears.
- 4. Click the Language tab.



- 5. Move the languages from the available list (on the left) to the selected list (on the right) to add language to the knowledge base or vice versa to remove it.
- 6. Save your changes or cancel them, using the appropriate buttons.

End

Important

Only regional languages and languages that do not have regional versions are shown in the list of available languages. Base language is automatically added to the knowledge base when at least one regional version of the same language is added, and it is removed when all regional versions are removed.

Example of default, base and regional languages:

English ✦ default English (United States) French ✦ base French (Canada)

French (France)

General principles of editing

- First version of the category or document must be created in the default language of the knowledge base.
- As soon as a document or a category is created in the default language they can be translated to the other languages or their regional versions.
- Regional version of the document can be created only after the document has been created in the base version of the same language.
- Base version of the document or category is available in the regional version of the same language in case there is no separate regional version of the same document/category.

Approval workflow

Documents and categories shares same approval workflow that consists of 4 states:

- Draft authoring is in progress
- In Review category ready for approval review
- Approved category ready to be published to the server and be used
- Rejected document has been reviewed and rejected for further editing

Visual indication of these steps are the following (from top to buttom: rejected, draft, in review, approved):

8
0
•
0

Let's look at an example fllow:

1. You have created new category/document - it will have "Draft" status.

O Draft	\rightarrow	~	×	

- 2. You can edit and save it multiple times before it reaches final version while still in "Draft" status
- 3. You reached the final version and are ready to send it for review; press "Submit the category for review" button and the category/document is now in the "In Review" status
- you can provide a comment for the reviewer to underline changes made and reason for approval.

Write a comment						
No		Yes				
Important Comments are visible in the Center Server and are not v	document histc sible for agents	ory only. Cor and custom	iments are iers using t	not exported he knowledge	into the Genesy	's Knowledge

• While reviewing the category/document in "In Review" status you can approve (using "Approve document" button) or reject (using "Reject document" button) the changes and provide your comment(s):



a. Comment(s) provided by author while sending document for review can be seen on the "Versions" tab of the edit category/document form:

idit category	0 0	a light killer -	
Sever Verlag			
empry Real Internal (2014) Enter Mai • Annual (2014) Enter (2014) (2014) (2014) • Annual (2014) (2			Collegeng metrices

- b. You can change content of the category/document and save it and thi document will become a "Draft" document requiring approval flow to be restarted
- Approved category/document is now in approved status and can be published to the Knowledge Center Server for use by agent and customers.





 Rejected category/document is in "Rejected" status and needs to be corrected and sent for approval once more.



Let's summarize this into the state diagram:



Changing the document status can be applied individually (as described above) or as the bulk operation:

1	aftermiter Starte Officiel		traject a debut -
н -	Company Norme I	themas .	maths 1
	Feedant	0	27811-0221320
	Excliquenties follows	•	27411-022-028
	Receivalge Laster Grow	•	2781142384047
	beau .	•	274-11-0218-0217

- · select categories/documents from the list
- in the toolbar operation applicable to the selected items will be shown
- click the desired state transition (Put on review, Approve or Reject)
 - selected operation will be applied to the document in the appropriate state only (for example if you select "Put on review" it will be applied to the Draft and Rejected documents in the selection list)

Working with Categories

Creating a New Category

Prerequisites

- The knowledge base has been defined in the CMS.
- Knowledge.CMS.Category.Author privileges have been assigned to the user.
- No category has been selected.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Categories.

•		
•	Category Name	
	Configuration	
	General	
	Genesys Knowledge Center Server	
	Administrator eXtension for Genesys Knowledge Center	
	Feedback	
	Genesys Knowledge Center CMS	
	Sizina	

3. Press the **Create** button.

- 4. The Create Category window appears.
- 5. Enter your category name.

Create Category				× English + defa	ult 👻
General					
Category Name *					
Close	O Pat	->	 ×	Save	Save & Close

6. Save your changes or cancel them, using the appropriate buttons.

End

Viewing or Modifying a Category

Prerequisites

- The knowledge base has been defined in the CMS.
- The category has already been created.
- Knowledge.CMS.Category.Author privileges have been assigned to the user.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Categories.
- 3. Choose your category from the list and click the **Edit** button or double-click the appropriate row.
- 4. The Edit Category window appears.

Edit categor	у		L	D	 English + default 	Ŷ
General	Versions					
Category Name *						
General						

- 5. View or browse through the category changes history (using the Versions tab) or make changes in the category name.
- 6. Save your changes or cancel them, using the appropriate buttons.
- 7. Every time you make a change, a new version of the category will be created and the new version of the formerly approved category will be given a state of **Draft**.

Deleting Categories

Prerequisites

- The knowledge base has been defined in the CMS.
- The category has already been created.
- Knowledge.CMS.Category.Author privileges have been assigned to the user.
- A connection to Genesys Knowledge Center is available.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Categories.
- 3. Select one or more categories from the list.

Delet			English	+ default
•	Category Name	Status	Modified	•
	Configuration	0	2016-10-20	12:47:18
	General	•	2016-10-11	16:05:21
8	Genesys Knowledge Center Server	0	2016-10-11	16:05:21
8	Administrator eXtension for Genesys Knowledge Center	0	2016-10-11	16:05:21
	Feedback	•	2016-10-11	16:05:21
	Senesys Knowledge Center CMS	•	2016-10-11	16:05:20
	Sizing	•	2016-10-11	16:05:20
	History	•	2016-10-11	16:05:19
	Genesys Knowledge Center Pulse Plugin	0	2016-10-11	16:05:19
	Languages	0	2016-10-11	16:05:19

- 4. Click the **Delete** button.
- 5. Confirm your action in the pop-up.

Working with Documents

Creating a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

Important

The maximum size of attachments is 20MB.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click **Documents**; a list of documents appears.

Creat	e Categories 🖌	All Statuses 👻	English +	default + C			X Onein
- 1	Question	Atlachments	Status	Channels	Valid from	Valid to 0	Modified 0
	Can I use Genergy Knowledge Center as a virtual assistant?		•	any			2016-11-02 13:48:46
	Can I configure my knowledge article approval workflow and lifecycle?		•				2016-10-13 13:27:20
	How can I assign Genesys Knowledge Center Plugins to my agents?		•				2016-10-13 13:27:2
	How can I set access control for my administrators and managers?		•				2016-10-13 12:27:11
	How can I archive older knowledge base articles?		•				2016-10-13 13:27:10
	Does Genesys Knowledge Center know how much time a person spends reading each article	(•				2016-10-13 13:27:1
	How can I add search capability to a custom agent desktop?		•				2016-10-13 12:27:16
	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center O		•				2016-10-13 12:27:16
	Can I prevent customers from seeing certain knowledge base articles?		•				2016-10-13 13:27:15
	Is agent feedback treated differently from customer feedback?		0				2016-10-13 13:27:19

3. Click the **Create** button; the **Create Document** window appears.

Create do	cument						0	# English + default	٠
FAQ	Categories	Custom attributes	Attachments	Other					
Question									
Itemative Quest	tions								
Add alter	native question								
Answer									
XGG	G G 🛧 🗠 Forma	 	B B B B	I 5 I.	E E 4. 4 99	B fourte 2	:		
holy									
hody									
hody									
boolty									

- 4. Fill in the FAQ tab by adding Question and Answer (required) or Article tab by adding Title, Summary and Description (required). Add alternative wordings of the question or title (by pressing the + sign in the Alternative questions field). Links and images are permitted in the Answer and Description fields to aid in answer clarity.
- 5. Fill in the **Categories** tab by selecting the appropriate categories from the list on the left and moving them to the right.

create doo	sument) # English + default	
FAQ	Categories	Custom attributes	Attachments	Other			
Administrator KD Archining (Inot Approved) Co Feedback Generative Generative Generative Generative Generative Common Viels Eng Heldery Heldery Heldery Heldery Heldery Scimp	ension for Genesys Knowledge ofganation pt Center DAS pt Center Pulse Plugin pt Center Faulue Plugin pt Center Server pt Center Knokopace Plugin agement	: Canter					

6. Fill in the desired **Custom attributes** values.

cate aver	ument						9	 English + defaul 	
FAQ	Categories	Custom attributes	Attachments	Other					
witch, boolean					Date, date				
Choose among th	he following								*
list, list of values					Numeria, numeri				
Choose among th	he following								*
tring string									

7. Add **Attachments** by pressing the **Add** button and then the **Upload** button. To remove attachments, press the **Remove** button.

FAQ	Categories	Custom attributes	Attachments	Other				
_								
Close					O But		See See 1	Orea
Contre					O then	7 7 6		

Important Maximum file size: 20 MB.

8. Fill in the **Other** tab as needed, including channel options which allows you to specify if a document is only for a specific channel type (for example, email only or chat only, or a combination of channels). The channel option is important for the agent experience. If the email attribute is added to content, then only agents that are engaging over email conversations will see that content. The experience would be similar for Chat. By default content is accessible for all agents using any channel. If content is public, it will be viewable to the public, regardless of the channel.

			Valid to			
aga						
Add Tag						
E Define document's (channels list					
aiet						
appoharing						
aumork						
busevent						
calback						
cobrowsing						
email						
fax						
inchat						

Important

If the content is publicly facing, it will always be visible to customers regardless of the channel attribute.

- 9. On the Other tab you could add different tags for the documents.
- 10. "Valid from" option specify the date from which document could be published to server
- 11. "Valid to" specify the date after which document will be unavailable on server after publication
- 12. (Optional) Click the **Languages** menu in the top right to create this document in multiple languages. For more information on Creating and editing documents in other languages, see Working with Multilingual Content.
- 13. Save your changes or cancel them, using the appropriate buttons.

End

Viewing or Modifying a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- The Document has already been created.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Documents; a list of documents appears.

Creat	te Categories 🖌	All Statuses 👻	English +	default +			×	
- 1	Question I	Attachments	Status	Channels (Valid from	Valid to = 1	Modified	٠
	Can I use Genesys Knowledge Center as a virtual assistant?	0	0	any			2016-11-0	2 13:48:46
	Can I configure my knowledge article approval workflow and illecycle?		•				2016-10-1	3 13:27:20
	How can Lassign Genesys Knowledge Center Plugins to my agents?		•				2016-10-1	3 13:27:26
	How can I set access control for my administrators and managers?		•				2016-10-1	3 13:27:14
	How can I archive older knowledge base articles?		•				2016-10-1	3 13:27:16
	Does Genesys Knowledge Center know how much time a person spends reading each article		•				2016-10-1	3 13:27:17
	How can I add search capability to a custom agent desktop?		•				2016-10-1	3 12:27:16
	Can I do Search Engine Optimization for articles created in the Generys Knowledge Center CF		•				2016-10-1	3 13:27:14
	Can i prevent customers from seeing certain knowledge base articles?		•				2016-10-1	3 13:27:15
	is agent feedback treated differently from customer feedback?		•				2016-10-1	3 13:27:16

- 3. Choose a Document from the list and double-click the appropriate row.
- 4. View or make changes in the editor.

* Ouestion How can't out access control for my administrations and managers? Menative Questions * Answer * Answe	t access central for ing administrators and nanagers ¹ exercises terrative question Terrative question Terrative question Terrative question = x* = 1 = 2 = 0 = 1 = 5 = 1, p = 1 = 0 = 0 = 0 = 0 = 0 = 0 = 0 = 0 = 0	* Outside How can't out access control for my administrations and managers* Managers Marketive Questions * Answer Sub OKC Server and the OKC CASS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the OKC Deployment Guide for more information of these philoges and how to ase them.	FAQ	Categories	Custom attributes	Attachments	Other	Versions			
How can I of access control for my administrations and managers?	t access control for my administrators and nanogent's exercises terrative question	How can I of access control for my administrations and managers?	Question								
Ansaer Soft GKC Server and the GKC CM3 have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GKC Deployment Guide for more inform these privileges and how to use them.	eetiens ternative question	Ansare Image: Service and the GRC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GRC Deployment Guide for more information of these privileges and how to use them.	How can I set acce	ss control for my administrat	tors and managers?						
Multi attenuative question Ansame X Or One	terruthe question Image: Interruthe question	Advanced by question Answer X On the Case of the Case Case have their case sets of advisionative privileges to allow agent to become administrators of these products. Refer to the CASE Deployment Guide for more information of these privileges and how to case them.	Uternative Question	ns							
Answer X O O O O O O O O O O O O O O O O O O O	Image:	Answer X Image: Comparison of the Company of the	- Antaherra	the question							
Answer X O B B I + O Format Image: Comparison of the company of the comp	Server and the GKC CMS have their can sets of administrative privileges to allow agent to become administrators of these products. Refer to the GKC Deployment Guide for more information on leges and how to use them.	Answer X Image: Comparison of the Company of t									
× ∞	a ⊕ ⊕ ← ∞ Format → ● → ∞ ⊆ ⊞ ⊕ Ω B J S J □ II ⊕ ⊕ III ⊕	Image: Solution of the GRC CASS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GRC Deployment Guide for more information of these privileges and how to see them.	Answer								
Both OKC Server and the GKC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Parler to the GKC Deployment Guide for more inform these privileges and how to use them.	Server and the GKC CM3 have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GKC Deployment Guide for more information on legen and how to use Rem.	Both OKC Server and the OKC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the OKC Deployment Guide for more information of these privileges and how to use them.	XOBB	G to Pornal	· · · · · · · ·	$\equiv \equiv \Omega = 0$	I 6 I, 2 1	······································	uce 24		
these privileges and how to use them.	leges and how to use them.	these privileges and how to use them.									
	e		Both GKC Serve	er and the GKC CMS have	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GKC Depicument	nt Guide for more information	e on
	e		Both GKC Serve these privileges	er and the GRC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GRC Deployme	nt Guide for more information	n on
	e		Both GKC Serve these privileges	er and the GRC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GKC Deployme	nt Guide for more information	n on
			Both GKC Serve these privileges	er and the GKC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GKC Deployme	nt Guide for more information	n on
	· · · · · · · · · · · · · · · · · · ·		Both GKC Serve these privileges	er and the GKC Cluts have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GRC Deployme	nt Guide for more information	n on
			Both GKC Serve these privileges	er and the GKC ChilS have and how to use them.	their own sats of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GKC Deployme	nt Quide for more information	
			Both GKC Serve these privileges	er and the GKC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GRC Deployme	nt Guide for more informatio	n on
		Plan benefit at the second sec	Buth GKC Serve these privileges	er and the GKC CMS have	their own sets of administra	tive privileges to allow a	agant to become administr	ators of these products.	Refer to the GKC Deployme	et Guide for more informatio	• ••

- 5. Save your changes or cancel them, using the appropriate buttons.
- 6. Every time you make a change, a new version of the document will be created and the new version of the formerly approved document will be given a state of **Draft**.

	Categories	Custom attributes	Attachments	Other	Versions		
Duestion How can't set acco Answer Both GKC Server more informatio New version	ess control for my administral r and the GKC CMS have their n on these privileges and how	tors and managers? own sets of administrative pri to use them.	vileges to allow agent to	become administrators of the	rse products. Refer to the	DKC Deployment Duide for	Document versions o default, 2 seconds ago default, 35 minutes ago o default, 35 minutes ago o default, 35 minutes ago o default, 35 minutes ago o default, 20 days ago
Eutopories Conexys Knowl Roles Continue attributes	edge Center Server						
Channels any	-						
O Draft, Saved b	y defiault at 2016-11-02 14:24	116					

Copying content from one document version to another

You can copy content of one document version to the version of document in another language

	۵	✓ English + default	Ŷ

Start

- 1. Open source version of document
- 2. Press Copy document button
- 3. Switch to destination document version or version of document in new language
- 4. Press Paste document button
- 5. Edit and Save document

End

Important

After copy all content except of Attachments will be dublicated to new document. Attachments should be added manually.

Deleting a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The Document has already been created.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

Important

You can only delete a document from the Knowledge Base if the Genesys Knowledge Center Server contains a Knowledge Base document with the same name.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.

- 2. Click **Documents**.
- 3. Select one or more Documents from the list.
- 4. Click the **Delete** button.
- 5. Confirm your action in the pop-up.



View document rating

To view overall rating of document use "Feedback" tab inside document edit window. Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Documents.
- 3. Choose your document from the list and click the Edit button or double-click the appropriate row.
- 4. Switch to Feedback tab

			-		Testball	
ARRING SIDE						
transporting 1 out of 1 day	1, 11-18940					
1 days		125				
4 store		-				
1 days		50%				
1 stars		-				
1.04		105				

End

Working with Multilingual Content

To review Knowledge Base content in different languages, simply select the appropriate language from the list located in the toolbar and the language selection displays a list of documents or categories in the selected language. If a document has no version in regional language, version in base language will be displayed. If a document was not defined in the selected base language, version from default language will be displayed and it is then grayed out.

Creating a new language version of a document

Prerequisites:

• If you are not currently in the document where you wish to add a new language, select the document from the list of documents and click **Edit**.

Start

1. From the Language list on the right, you can view a list of available languages. Languages with a check mark denote documents which are currently available. Languages with an X denote documents which are not yet created.

FAQ	Categories	Custom attributes	Atlachments	Other	Versions		 English + default 	
Constant Inc.							English (United States)	
Non can i witt som	the completions have a complete management	t desites?					Prench + base	
How can I also sean	on capaciting to a coston ager	t desktop.					 French (Lanaca) 	
Alternative Question	hs						· resurptions	
Add alternal	tive question							
Answer								
Answer X & B B Knowledge Cent	🛱 🐟+) Format	e 🔹 🤉 🖾	T AP1. You can use th	$I = 5 \mid \mathbf{I}_{\mathbf{x}}$] $I = I$ is API to add search ca	t -0: -0t 99)[⊞ t	desitup.		
Answer X C B B	G ★ →] Format or Server exposes all of its 5	। 🔹 🔹 न् 🛙	TAPL You can use the	I 6 I, I II II	t di dit 99) 🗎 t publities to your custors	ourse 🗙 desitop		
Answer X C C C C	G ▲ →] Formet or Server exposes all of its b	vectorality through a RE1	T API. You can use th	I S I] II II	t (tt 99) [🔒 t publities to your custom	ource X		
Answer X C C C C	(i) ← →) Format Forwar exposes all of its f	vectorality through a RE1	T APL You can use th	$I = S \mid I_n$] [$I = I$ is API to add search ca	t ct. dt 99] [🗎 t publities to your custom	desitop		
Answer X C C C C C C C C C C C C C C C C C C C	ⓐ ♠ ⇒][format in Server exposes all of its 5	•) (= • • • •) (🖸	T APL You can use th	$I = S T_e \rangle $ (20 10) is API to add search (2)	abbilities for your custom	desitop.		
Answer X C C C C C C C C C C C C C C C C C C C	ⓐ (♠ →) Format or Server exposes all of its 5	•) = •• =) =	T APL You can use th	$I = S + T_c \Big [zz = z]$ is API to add search ca	abbilities for your custom	desktop		
Answer X C G G	(a) (← →) Format or Server exposes all of its t	• ि • • व ि	I III III Ω B	I S I, I II II	publities to your custom	desitip.		
Answer X C G G G Knowledge Certi	■ ★ → Front or Server exposes all of its 5	•) • • • = •	T APL You can use th	I 6 7, [# #	[4k 99] [∰ 8	desitup.		

- 2. Click the specific language with an X to create the new document in that language.
- 3. Update appropriate fields.
- 4. Save changes.
- 5. Once approved, the language displays a check mark.



E	n	d
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Publishing Knowledge base to Knowledge Center Server

Publishing selected documents

Important

Only approved documents and categories will be published to the Knowledge Center Server. If the current version of a document is not approved, the latest approved version will be published.

Documents can be published from base language if no regional languages have been configured. If regional languages are configured for base language, documents should be published directly from regional languages. If there is no regional version for a document, the version from base language will be published instead.

Prerequisites

- The knowledge base has been defined in the CMS.
- The categories have already been created and approved.
- Your Documents have been created and approved.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Approver privileges have been assigned to the user.
- Knowledge.Author privileges have been assigned to the user.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Documents.
- Using the check boxes, select the document(s) you wish to publish or leave all documents unchecked to publish them all.
- 4. Click the **Publish** button.
- 5. All approved documents from the CMS are exported into Genesys Knowledge Center Server.

	Campons / Anna	*	College (Counter	stated +			Canada da c
- N	Question (Attachments	Status	Channels	Valid from	Valid to 1	Modified #
я	How can I add search capability to a custom agent desktop?		0				2016-11-02 16:00:21
я	Does Genesys Knowledge Center know how much time a person spends reading each article		0				2016-11-02 16:00:21
8	How can I set access control for my administrators and managers?		0	any			2016-11-02 16:00:21
я	Can I prevent oustomers from seeing certain knowledge base articles?		0				2016-11-02 16:00:21
я	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center Cl		0				2016-11-02 16:00:21
8	is agent feedback treated differently from customer feedback?		0				2016-11-02 16:00:21
я	Can I configure my knowledge article approval workflow and lifecycle?		0				2016-11-02 13:49:01
я	How can I archive older knowledge base articles?		0				2016-11-02 12:49:01
я	How can I assign Genesys Knowledge Center Plugins to my agents?		0				2016-11-02 13:49:01
я	Can I use Denesys Knowledge Center as a virtual assistant?		0	any			2016-11-02 13:49:01

Important

To publish attachments with documents the following option in Knowledge base settings should be configured:

- 1. go to Edit Knowledge base
- 2. switch to Synchronization tab
- 3. select "Attachments synchronization type" and choose the appropriate option:
 - Do not export attachment
 - Export only attachments URLs (attachments will be available for download in Knowledge Server, but not used in search optimization)
 - Export attachments with content (attachments will be available for download in Knowledge Server and will be used in search optimization if possible)

Constant Constant	Curtan attracted	Cardindau	Channes .		Synchronia	100	40.000	
Automatic synchronization	- 07							
Attachments specification	disc type		Drieduling					
Expert attachments with	Provine 4		Hearty					
Do not expert attaches Report only attachesed Report attachesed	erita In CARLA IN Contant		Repeat every	1	hear(s) all	•	autors)	

For the correct upload of attachments, in the Application Cluster option **externalURL** in section **cms.general** should point correctly to CMS. For example:

http://<cms host>:<cms port>/gks-cms

Setting up automatic synchronization

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Edit.
- 3. The Edit Knowledge Base window appears.
- 4. Click the **Synchronization** tab.
- 5. Click the Automatic synchronization box to turn it On.
- 6. Choose the following options:
 - attachment synchronization type
 - list of languages to be synchronized
 - set scheduling:
 - One time to synchronize once
 - Daily to synchronize every N hours
 - Weekly to synchronize on the defined days of week
 - Monthly to synchronize on defined days of month

n off							
ation type		Scheduling					
Export attachments with content 👻			Hourly ~				
nguages			hour(s) at	minute(es)			
	1						
	in Off	n off tion type th content ~	n Off tion type Scheduling Hourty Repeat every 1	n off sion type Scheduling th content V Hourly Repeat every 1 hour(s) at 0			

7. Press **Confirm** to save your changes.

End

Synchronizing recent changes

Prerequisites

- A connection to the Knowledge Base must be available
- Knowledge.CMS.Approver privileges have been assigned to the user.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click **Modifications** from the side menu to see a list of documents that have been modified since the last synchronization.
- 3. Click the **Synchronize** button.

Question	Language	Type i	Approved	Modified
How can I add search capability to a custom agent desktop?	English	APPROVED		2016-11-02 16:0
Does Genesys Knowledge Center know how much time a person spends reading each article?	English	APPROVED		2016-11-02 16:0
How can I set access control for my administrators and managers?	English	APPROVED		2016-11-02 16:0
Can I prevent customers from seeing certain knowledge base articles?	English	APPROVED		2016-11-02 16:0
Is agent feedback treated differently from customer feedback?	English	APPROVED		2016-11-02 16:0
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	English	APPROVED		2016-11-02 16:0
Can I use Genesys Knowledge Center as a virtual assistant?	English	APPROVED		2016-11-02 12:4
Can I configure my knowledge article approval workflow and lifecycle?	English	APPROVED		2016-11-02 13:4
How can I archive older knowledge base articles?	English	APPROVED		2016-11-02 13:4
How can Lassign Genesys Knowledge Center Plugins to my agents?	English	APPROVED		2016-11-02 12:4

4. From the confirmation dialog box, select the languages you wish to synchronize and click **Synchronize**.

	ge 2000 0 ,	
inguages for sy	nchronization	
English (United	1 States), French (Canada)	/
Cancel		Synchronize

When the synchronization process completes, the list of modifications is then updated.

Working with Customer Feedback

Processing a "No answer" Item

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.
- Knowledge.Author privileges have been assigned to the user.

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Feedback.
- 3. Choose the **No answer** tab.

			English (United States) + From Trom date	to To date	Filter
*	Originator	Agent ID	Query	Language	Created
	2	gks_none	How should I ask questions?	English (Un	2016-11-02 16:56:38
	2	gks_none	Can I configure my knowledge article approval workflow and lifecycle?	English (Un	2016-11-02 16:52:47
	2	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center cluster?	English (Un	2016-11-02 16:52 28
	2	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center cluster?	English (Un	2016-11-02 16:52:20
	2	gks_none	What is the difference between the Knowledge Cluster and the Knowledge Server?	English (Un	2016-11-02 16:52:02
	2	gks_none	Why do I need the Genesys Knowledge Center CMS?	English (Un	2016-11-02 16:51:53
	2	gks_none	How can I assign Denesys Knowledge Center Plugins to my agents?	English (Un	2016-11-02 16:51:34
	1		90 th	English (Un	2016-11-02-01:21:47
	1		•	English (Un	2016-11-01 20:06:46
	1		Drigstigsig	English (Un	2016-11-01 20:06:41

- 4. Choose one or more items from the list.
- 5. Process each item:
 - Search for similar existing questions using the **Search** button.

ja Genes	sys Knowledge	e Center Doc	uments Categories Feedback Modifications	
Home /	knowledgefaq	/ Feedback		
No ans	wer	Votes	Drafts	
Creat	te document	Dele Q S	earch	English (Unite
•	Originator	Agent ID	Query	
Ø	<u>¶</u>	gks_none	How should I ask questions?	1
	<u>g</u>	gks_none	Can I configure my knowledge article approval workflow and lifecycle?	
	<u>g</u>	gks_none	Why do I need to configure two communication ports for the Genesys K	nowledge Center cluster
	<u>@</u>	gks_none	Why do I need to configure two communication ports for the Genesys K	nowledge Center clust
	<u>¶</u>	gks_none	What is the difference between the Knowledge Cluster and the Knowled	ge Server?
		the pope	Why do I need the Genos	

• Click the Create document button and create a new document based on the No answer item.

reate do	cument						۵	ж English + default	٠
FAQ	Categories	Custom attributes	Atlachments	Other					
vestion									
low should I as	A questions ?								
emative Quest	tions								
Addutter	native question								
nsiwer									
X S G	G G + > Front			6 2 1 1 1	a a 22 B	tourte 30			
Close					0.000		~	See See	A Cheve
					- unit	4 4	~		

• Delete unnecessary items using the **Delete** button.

End

Processing Votes

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Feedback.
- 3. Choose the **Votes** tab.

			All +	English (United States) + From From dute	10 To date	Filter	
Originator	Document Question	Туре	Rating	Query	Language	Created	
1	What components are included in Genesys Knowledge C		*****		English (Un	2016-11-02 17:10:24	
1	Why do I need the Genesys Knowledge Center CMS?	91		Why do I need the Genesys Knowledge Center CMS	English (Un	2016-11-02 17:10:04	
1	Why do I need the Genesys Knowledge Center CMS?	*	****	Why do I need the Genesys Knowledge Center CMS	English (Un	2016-11-02 17:09:47	
1	How should I ask questions?	*	*****	What are alternative questions	English (Un	2016-11-02 17:09:30	
1	Can I restrict access to the knowledge base to my agent:	-	★★★☆☆	Can agents add new documents to the knowledge base	English (Un	2016-11-02 17:09:18	
1	How should I ask questions?		*****	How should Lask questions	English (Un	2016-11-02 17:09:04	
1	How many clusters are required in my environment?		*****		English (Un	2016-11-02 17:08:41	
1	How do I configure two Knowledge Servers into a cluster			How do I configure two Knowledge Servers into a cluster	English (Un	2016-11-01 19:58:44	
1	How do I configure two Knowledge Servers into a cluster	-		cluster	English (Un	2016-11-01 19:54:47	
1	How do I configure two Knowledge Servers into a cluster			cluster	English (Un	2016-11-01 19:49:19	

- 4. Choose one or more items from the list.
- 5. Process each item:
 - Add a search query as an alternative question for the upvoted document using the **Add as alternative** button. Or **Edit** existing document. Or **Create** new document basing on search query.

FAQ	Categories	Custom attributes	Attachments	Other			
Suestion							
How should I ask	questions?						
ternative Questi	ons						
Add altern	ative question						
loswer							
~	م الم ما الم	de tele					
A 13 MB 1				1 9 A 1 1 1	······································		
							-
							e

• Delete appropriate items using the **Delete** button.

Processing Drafts

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

Start

- 1. Move your mouse over the appropriate knowledge base icon on the main page.
- 2. Click Feedback.
- 3. Choose the **Drafts** tab.

No ans	wer Votes Drafts		
.	Question	English (U Answer	hited States) - From Fro
	How should I ask questions? NEW QUESTION	NEW ANSWER FOR QUESTION	English (Un

- 4. If any drafts are awaiting review, they are present under this tab.
- 5. Process each item: Create new document or Reject draft

End

Using the CMS

Overview

Genesys Knowledge Center CMS is an easy and intuitive application that allows your knowledge authors to collaborate to create valuable digital assets used within your company. The CMS provides a user interface that your editorial team and managers use to create, manage, and deliver content to your employees, customers, and IT systems.

The user interface is secure, role-based and customizable, allowing your development team to cater the editorial experience to the exact needs of end users. The CMS also provides you access to the various types the information collected while knowledge being used, such as:

- · Likes and dislikes for the results searched
- Document content quality ratings
- Questions there is no relevant knowledge for
- Most used, recent questions, and so on

All of this feedback is valuable to the author for content quality improvement.

Basics

Before we start to deep-dive into the CMS functionality, let's go through the key principles of content organization within the CMS.

Knowledge base

A knowledge base is the organized collections of your digital assets. It is the top level of the organization within the CMS that allows you to keep documents related to different areas aside from each other. Also, it allows you to define the key principles of the organization within its boundaries. For example:

- Languages supported by the knowledge base
- Types of the documents
- Access rights
- Publication schedules
- Category taxonomy

Category

Taxonomy element helping you to define the topics hierarchy within your knowledge base and group documents to those topics.

Document

An atomic element of the knowledge. The document captures a bit of corporate information as well as the history of its evolution. The document might have multiple language versions within languages allowed in the knowledge base.

Language

The CMS allows you to keep different translations of the same document together by creating language versions of the document. On top of support of distinct different languages (for example, English, French, German), the CMS also allows regional languages that help you to adopt documents to particular regions using the same language, but different dialects (for example, French - Canadian and French - France),

Who is the CMS intended for?

There are several types of roles the CMS is intended for:

- Knowledge Administrator technical personnel responsible for maintaining your knowledge solution
- Knowledge Author your editorial team that creates and maintains valuable knowledge within your organization
- Knowledge Managers supervisors of the editorial team who validates the authored knowledge and approves it for company-wide usage

How to create and use your first document?

To start with your knowledge you need:

- As the Knowledge Administrator:
- 1. Create a new knowledge base,
- 2. Make it active and public
- 3. Define the synchronization schedule that allows automatic knowledge publication
- As the Knowledge Author:
- 1. Create a new category/topic
- 2. Create a new document

- 3. Submit both newly created category and document for review
- As the Knowledge Manager:
- 1. Approve submitted category
- 2. Approve submitted document

Having this step completed, newly created document will be published automatically (according to the defined schedule) and be available for your customers, agents, and automated systems:

- Agents can use Knowledge Center Plugin for Workspace Desktop Edition Help to browse or search through the knowledge and apply it to customer's interactions.
- Customer can interact with the knowledge in Genesys Widgets and Sample UI.
- Automated systems, such as routers, conversation bots, can use knowledge to serve the customer without the involvement of the agent (for example, Chat Deflection within Genesys Widgets).

Overview of the CMS User Interface

This chapter describes general principles of the CMS UI organization as well as such general functions as login/logout, getting help, navigating between different views, and so on.

Login into the CMS

When you enter the CMS URL in your browser, the first page you will see is the login screen:



Enter your login and password in the dedicated boxes and hit the **Log In** button.

Note: To login to the CMS you need to have at least one of the knowledge privileges assigned (author, approver and/or administrator).

Inside the CMS

Dashboard

Once you've logged in to the CMS the Knowledge Dashboard displays the summary of the knowledge authored in the CMS.

Welcome to Genesys Knowl	edge Center CMS		
By knowledge base		Recently modified	
		How much can a business contribute to a $10^{\rm o}$ (simplified employee persion) each year'	Dame 138anii, Francis, 3 Years ago ile dela
		How is a debit card different from a credit card?	Jame Ulank, French, Flower age by dela
		What is the current ordered for Santa of America allock?	Jame Olard, Perch, J Neura age by Mrk
		What are the advantages of working with a Menil Lorch Fragming Advance?	Jame Glark French J hours age to teld
		Can Link my credit card to my Bank of America checking or savings account?	Jame Ullarit, Panels J Neurs age by Itela
	274	When I enter my Deline ID, I see a title instead of my Shelkey image. Why?	Jame (Bark, Franch, J hours age by data
	Istal Document	What is a simple internal loan?	Jame Ullank, French, J hours age-by-defa
	Number	Carl my spouse access my account while I am deployed?	Jame Ullard, Frend), J hours age by dela
		The much state a late depart box cost?	Jame Utherit, Franch, Planett age by Mitte
		Recently rejected	٠
		Where do I find a fast of media contacto?	Demo Offacel, Digital, J Neuro age dy defe
		Where do i find information about community minimetiment activities?	Dance Offanis, Digitals, J. Neuro age-lip-dela
Bylanguage		Recently approved	-
N		These to do a research project on Bank of America and seed access to information about your financi	Denne: Olkardi, English, 2 Neuro age by dela
m		now car i mare sure i dont perspend with the credit card? Car i transfer i onto cara na Back of transfer caracterizational?	Denne Milack, Lingdolt, J Nouri age dy della
		(a) I contribute to a 4010, 4000 or other engineer contracted data card also contribute to an 844	Dense Stand, Copier, 2 which age to this

Page Elements

Let's review some of the major navigation elements available on the page.

Tip

Click any of the images below to enlarge them

The top-most line is the main menu line providing you access to the functional areas of the product:

Senesys Knowledge Center CMS Knowledge bases ◄

This main menu includes the following elements:







Clicking on the elements of the Knowledge base menu or Administration menu will lead you to the working area of the product (for example, document authoring):

g Generys Knowledge Center OMS	Crowledge bes					θ.	0 - pi.	te pictore i
Center FAQ	Documen	rts						
E Deserverts	-	🖌 🖉 👩 Andres - Approx -					Publish	0
Categories	0	Santin .	Type	All Datums — ~	ø	o	Multiple	
R. Data		Carl I use Senergy Knowledge Center as a virtual assistant?	FNQ.	-0	~	~	3 hours age	
C No arcowr		How can I set access control for my administrators and managent?	FAQ.		~	~	Theory age	
0		How can I and/ve older knowledge basis articles?	FNQ.	-0	~	~	3 hours age	
O Motifications		How can I add search capability to a outtom agent dealing?	FAQ		~	~	Theory age	
		Can I dis Search Engine Optimization for articles created in the Genergy Kitoshindge Center 2007	FNQ.	-0	~	~	3 hours ago	
		Can I have my DMS store-content in a database or other data store?	FNQ.		~	~	1 hours age	
		is apent feedback resided differently from oursomer feedback?	FNQ.	-0	~	÷	3 hours age	
		Can I prevent Knowledge Center from answering certain questions?	FNQ.		~	~	1 hours app	
		Why do I need the Workspace plugin?	FNQ.	-0	~	~	3 hours age	
		Why aven't any results returned horn-my query?	FAQ	-0	~	~	1 hours age	
		How does my feedback help Senergy Khowielge Center?	riug.	-0	~	~	3 hours age	
		Do the Knowledge Denter DMS and the Knowledge Denter Server use the same data?	rag		~	~	1 hours age	
		How long is information moved in the historical database?	mq	-0	~	~	3 hours age	
		What reporting data is available in the Pulse plugint	FNQ		~	~	1 hours age	
		Why do I need the Cenergys Knowledge Center CMI7	mq	•	~	0	3 hours age	
English -								
Base -	1,160112	15 * prop			-	1	of 4 x	1.10

On the left side, there is a sidebar menu that helps you navigate within the authoring area. While an in-depth review of each element is covered in the authoring manual, let's go though the general principles:

The top line of the sidebar is dedicated to the visual indication of the area that you are in:

- If you see a graduation hat icon and the knowledge base name, you are in the authoring area
- If you see the gears icon, you are in the administration area

At the very bottom of the sidebar, there is an element that allows you to expand or collapse the sidebar. Collapsing the sidebar leaves more space for the main area:

Create	🔸 🗡 🗄 Bevlew Approve 🗸					Publish	
•	Question 0	Туре	All Statuses 🗸 🗸	0	0	Modified	
	How to create new knowledge base?	FAQ	•	~	0	6 hours ago	
	What is a knowledge base?	FAQ	•	~	~	6 hours ago	
	Why do I need the Genery's Knowledge Center CM57	FAQ	•	~	v	6 hours ago	
	Does Genesys Knowledge Center know how much time a person spends reading each article?	FAQ	-0	~	~	14 hours ago	
	Can I configure my knowledge article approval workflow and lifecycle?	FAQ	-0	~	~	14 hours ago	
	Can I use Genesys Knowledge Center as a virtual assistant?	FAQ	-0	~	~	14 hours ago	
	How can Larchive older knowledge base articles?	FAQ	-0	~	~	14 hours ago	
	How can I set access control for my administrators and managers?	FAQ	-0	~	~	14 hours ago	
	How can I assign Genesys Knowledge Center Plugins to my agents?	FAQ	-0	~	~	14 hours ago	
	Should I let Benesys Knowledge Center Server know how many answers a user viewed?	FAQ	-0	~	~	14 hours ago	
	Can I have my CMS store content in a database or other data store?	FAQ	-0	~	~	14 hours ago	
	Can I do Search Engine Optimization for articles created in the Generys Knowledge Center CMS?	FAQ	-0	~	v	14 hours ago	
	How can I add search capability to a custom agent desktop?	FAQ	-0	~	~	14 hours ago	

The main area is the one where all the work happens. There are two main types of the main area views:

- Table view (as shown above) displays multiple elements (documents, categories, knowledge bases, and so on) with some summary information.
- Element view displays a particular element.

Within table view you have:

- The knowledge base name (if the sidebar is collapsed)
- Sub-area name (for example, Documents, Categories, Knowledge Bases)
- Toolbar with action buttons
- Table view itself
- Table view navigation:
 - Number of elements per table page:

	100		Sea
	50		l ac
	15		
1 <u>-</u> 15 of 52	15	~	р

• Navigation between pages:

~	¢	Page	1	of 4	>	>>	
---	---	------	---	------	---	----	--

Knowledge Dashboard

Overview

Knowledge Dashboard provides you with valuable information on your content. It allows you to see the total number of documents, their distribution within the knowledge bases, and languages. It also shows the most recent changes in the documents.



Click any of the images on this page to enlarge



Knowledge analytics

The left column of the dashboard contains analytical diagrams showing the distribution of the knowledge content by knowledge bases and languages.

By knowledge base

This interactive sunburst diagram allows you to see:

• A total number of unique documents in knowledge bases



 The inner cycle of the diagram shows distribution of those documents between the different knowledge bases. A sector is assigned to every knowledge base, representing a percentage of the documents that belong to each knowledge base. If you hover your cursor over a sector, you see the name of the knowledge base and the number of documents in it:



• The outer cycle of the diagram shows the average percentage of the translated documents within the knowledge base. A percentage is shown relative to the number of documents within a particular
knowledge base (not in the relation of the total number of the documents within all knowledge bases). For example, say you have 100 unique documents in English and the knowledge base also has French and German languages available, with 50 and 70 documents translated. The Inner cycle will show 100 as the number of documents in the knowledge base. Outer cycle will show 60% as the average translation percentage (50 + 70 / 2).



By language

Below **By knowledge base** you will find **By language** distribution. This diagram shows the number of documents you have in every language and its regional sub-languages (if they are defined for a language). **Note:** Total number of documents is higher compared to "By knowledge base" as every language version of the same document is counted toward its language.

For example, in the example above you, have 100 English, 50 French, and 70 German documents. Whereas on "By knowledge base" the total number of documents will be 100 as it shows only unique documents.



Recent changes

The right column of the dashboard contains the recent changes in the knowledge content:

• recently modified - last 10 edited documents

Recently modified	
Has my order been shipped?	WebShop Online Heip, Doplish, 28 seconds age by pic, one
Can I cancel my order?	WebShop Gnilne Heijs, English, 54 seconds ago by plic_cme
How can I set access control for my administrators and managers?	Knowledge Center FAQ, English, 1 minute ago by gitz, one
Can I use Genesys Knowledge Center as a virtual assistant?	Knowledge Center FAQ, English, 1 minute ago by picc, one
Can I configure my knowledge article approval workflow and lifecycle?	Knowledge Center FAQ, English, 1 minute ago by pic_ome
How can I archive older knowledge base articles?	Knowledge Center FAQ, English, 1 minute ago by picc, one
Does Genesys Knowledge Center know how much time a person spends reading each article?	Knowledge Genter FAQ, English, 2 minutes ago by picc, one
What is a banking center?	Demo: Ollanik, English, 2 minutes ago by pic_ome
Where do I find information about community reinvestment activities?	Deme: OBank, English, 2 minutes ago by gisc., one
Where do I find a list of media contacts?	Demo: OBanik, English, 2 minutes ago by pisc, one

• recently rejected - last 5 rejected documents

Recently rejected	-
Can I configure my knowledge article approval workflow and lifecycle?	Knowledge Center FAQ, English, 1 minute ago by gkz, oma
How can I archive older knowledge base articles?	Knowledge Center FAQ, English, 1 minute ago-by-pic_,cma
Where do I find information about community reinvestment activities?	Deme: GBank, English, 2 minutes ago-by gkc_ome
Where do I find a list of media contacts?	Demo: OBank, English, 2 minutes ago by girc, one

• recently approved - last 5 approved documents

Recently approved	-0
How can I set access control for my administrators and managers?	Knowledge Center FAQ, English, 1 minute ago-by gits, one
Can I use Generys Knowledge Center as a virtual assistant?	Knowledge Center FAQ, English, 1 minute ago by girc, oma
What is a banking center?	Demo: Othank, English, 2 minutes ago by girc, oma
How can I assign Genesys Knowledge Center Plugins to my agents?	Knowledge Center FAQ, English, 1 day ago by default
Should I let Genesys Knowledge Center Server know how many answers a user viewed?	Knowledge Center FAQ, English, 1 day ago by default

• recently submitted for review - last 5 documents submitted for manager's review

Recently submitted for review	-0
Can I cancel my order?	WebShop Cisline Heip, English, 30 seconds ago by pic_cms
Has my order been shipped?	WebShop Online Help, English, 2 minutes ago by pic, one
Does Genesys Knowledge Center know how much time a person spends reading each article?	Knowledge Center FAQ, English, 4 minutes ago by gkc, one
What type of information do you collect from me?	Demo: Obank, English, 4 minutes ago by pkc.cms
Co you sell spare parts?	WebShop Online Help, English, 22 hours ago by gluc, one

Every document shown in recent changes has:

- 1. Document title that you can click to open the document
- 2. Knowledge base that it belongs to
- 3. Language of the document
- 4. When it was changed
- 5. Login of the agent that changed the document

Does Genesys Knowledge Center know how much time a person spends reading each article?

Knowledge Center FAQ, English, 4 minutes ago by gkc_cms 2 3 4 5

Managing Knowledge Bases

Overview

The administration area allows you to set up knowledge bases according to your company needs. To open the administrator area click the gear icon in the main menu and then select **Knowledge Bases** from the drop down menu.

* -	e
Administration	
Knowledge bases	
Templates	
Kestore Purge	all

Important

To access the functionality you need to be assigned CMS Administrator privilege -Knowledge.CMS.Administrator (for more details, please see Access Permissions).

Creating a new knowledge base

To create a knowledge base in the administration area:

1. press the **Create** button:

്റ് Genesys Knowledge Cen	er CMS Know	ledge ba	es +				¢	- 0 - gkc_i	,cms gko
Administration	Knov	wled	je bases						
Knowledge bases	Crea	te	i i			Backup	Restore	Purge all 👻	0
Templates		0	Display Name	0	Active	Public	External	Modified	0
			WebShop Online Help		3			2 seconds ago	
			Demo: GBank		0	~		3 hours ago	
			Knowledge Center FAQ		0	~		3 hours ago	

- 2. A new knowledge base form is opened. Fill in the mandatory fields:
 - enter Name
 - enter **Display Name**
 - select at least one document type in **Document types**
 - select at least one language in Languages
 - select the **Default language**

Genesys Knowledge Center CMS	Knowledge bases +	🌣 🗸 🛛 🗸 gkc_crr	s gkc_cms 👻
A			
Administration	New Knowledge base		
😂 Knowledge bases	<	Save & Close	-
Templates			
	- ^ wante		
	ungung vanim		
	Percention		
	* Document types		
	Choose among the following		•
	* Languages		
	Choose among the following		•
	* Default language		
	Choose among the following		-
	Content Burlet. LMS		
	Private		
	Accessible for any agent		
	C Default document channels: any		
	Voting allowed		
	5-star ratio allowed		
	Properties		*

3. Click Save & Close.



There are several properties that cannot be changed after you have created a knowledge base. Please pay special attention when you select your values for them:

- Name defines unique name of the knowledge base
- Document types type of the documents that can be created in the knowledge base

- Default language language that documents need to be created first in
- Content source defines whether the content of the CMS will be created in Genesys Knowledge Center CMS (value: CMS) or in third-party CMS system (value: Third-party)

Using external content

Knowledge Center allows you to source content from an external system and still be exposed in the same way to the company's agents and customers.

Content source: CMS	Content source: CMS (default) - Content will be authored in Knowledge Center CMS
Content source: Third-party	Content source: Third-party - Content will be sourced from external CMS system

Important

Content source can only be defined when the knowledge base is being created. You cannot change the source for the existing knowledge base.

Defining access permissions

The following properties allow you to define the proper access to your knowledge base:

Active/Inactive



|--|

Private/Public

Private	Private (default) - Knowledge base will be visible for agents only 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.
Public	Public - Knowledge base visible for any user

Skill-based access

You can make your private knowledge bases available to only a subset of your agents by selecting Skill-based access to the 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 grant an agent access to the knowledge base:

Accessible for any agent	Accessible for any agent (default) - knowledge base will be accessible to any agent without any restrictions
	Accessible for agent with skill(s) - allows you to specify list of skill-defining restrictions accessing the knowledge base.
Accessible for agent with skill(s) Skills technicalsupport Add Skill	When this option is activated additional properties are shown. Skills - allows you to define the list of skills for restriction. In a 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 the ability to access the knowledge base. To add a skill:
finance sales	1. Select a skill from the list or start typing the skill name to limit the number of skills shown.
website	2. Press Enter or click the list element to add it to selection.
	To remove a skill:
	1. Move your mouse over the selected skill.

2. Click the X icon after the skill name.
* Skills
finance × Add Skill

Behavior options

To edit the behavior options you need to expand **Properties** at the bottom of the knowledge base form:

Behavior	
Name	Value
✓	
Number of shards	1 /
Number of replicas	1 🖉
✓ a faq	
Out of domain	0.5 🖋
Number of answers	3 🖋
Number of answers in preconfidence selection	10 🖌
Trending period in days	30 🖋
Marked as created during period	1 /
Marked as recently modified during period	1 /
Marked as created during period Marked as recently modified during period	1 /

An option can be edited by clicking on the value. While editing, a hint is shown describing the option and valid values:

Description: Number of shards	×	Value
Minimum value: 1	^	
Default value: 1		ī
		1 🌶

Importing knowledge base configuration

Cloning the knowledge base configuration

To re-use the configuration of an existing knowledge base to create a new one you must:

- 1. Open the list of knowledge bases.
- 2. Open the knowledge base you wish to clone.
- 3. Click the drop-down menu next to the **Save & Close** button.
- 4. Select the **Backup configuration** menu:



5. The browser downloads a text file with the knowledge base configuration (name: knowledgenbaseld + ".scheme").

knowledgefaq.scheme

- 6. Go back to the **Knowledge Bases** page.
- 7. In the **Create** drop-down menu select the **Import** ... option:

Knowled	ge bas	es	
Create	- /	Î	
Create)	ame	
Import	>	ank	
	Knowledg	e Center FA	Q

8. Select **Browse**, choose the recently downloaded file in the opened dialog window and then, click **Import**:

	×
Import knowledge base configuration	
	. 1
Browse Mowieogerad, scheme	
Cancel	>
	-

9. For CMS 8.5.304 and later: The new Knowledge Base form is opened and pre-filled with the values from the loaded knowledge base configuration.



Note: In CMS versions earlier than 8.5.304 , you were required to modify the knowledge base ID and properties in the exported file before importing it to the system.

Templates

Important

The described functionality below is available in Genesys Knowledge Center CMS 8.5.304 and after.

Overview

Templates can be accessed by selecting the **Templates** menu from the **Administration** menu:



Document templates allow you to define:

- The desired breakdown (into section) of document content
- Any instructions to authors on the intended use of any of the sections
- Visibility for every section by limiting access to its content to the desired group of users (customer, agent or sub-groups of agents)

To be able to view and manage templates you need to have Knowledge.CMS.Administrator privilege (for more details, see Access Permissions).

Viewing existing templates

When you navigate to templates by selecting **Templates** from the **Administration** menu, CMS will show you the list of templates that are currently available in your system:

g Genesys Knowledge De	nter CMS	Read	dyr bases +	
Administration		Tem;	lates	
Consider bases		Creat		
tt Templates			10m	A0
(Standard Article	ARTICLE
\subseteq	7		Standard FAQ	FAQ

From this view you can:

- create new template:
 - from empty template
 - using previously exported template
- modify existing template
- delete existing template
- disable template (to prevent new documents to be created using this templates)
- filter out the list of the templates by:
 - template name
 - document type
 - enable/disable status
- sort the template list by:
 - template name
 - modification date

Creating a new template

- 1. Click Create
- 2. Enter values for the mandatory fields (marked by a red star), as well as any other pertinent fields.

Article v	with Agent Intraction	
+		om -
- 10		
iteration.	unia	
• Name		
Article with	eth Agent Hitsgeban	
Description	-	
Common	e Artise desument providing public sontene santise publicave santise. For the agents	
Desmant	t type	
4.509		-
C) Ind		
Sections		
	German 💽 Wandersay	
10	Provide publicity coldies content in this section	
	4 Page -	
	tota Detect	
	People separal execution for the appet or the internal systems used	
10		
	& Aperacity -	
Add section	٠	

3. Click **Save & Close** or select one of the other options from the **Save & Close** drop-down menu.

Save & Close	-
Save & Close	
Save	
Discard & Close	
Discard	
	_

Standard templates

When you start CMS for the first time you will see two templates already created for you:

- Standard Article
- Standard FAQ

Both these templates are created by default and configured to have one public section. You can redefine these templates according to your needs.

Important

The template can be changed or deleted if there are no documents in your knowledge bases that are using it.

Тір

You can disable the template to prevent it from being used by authors to create new documents.

Templates explained

Field	Description
	Allows you to define a unique technical name for templates. This name is used when you export or import any templates or documents using it.
	Id restrictions:
Id	 It is not allowed to have two templates with same id.
	 Only [a-z][A-Z][0-9] characters allowed to be used in the id.
	• Id cannot be modified one document is created.
Name	Defines the name that authors can chose from when they are creating new documents.
Description	Provides a short explanation on how the template is used. It is shown to the authors when they create a new document.
	Allows you to select one of the basic document types that are extended with the templates. Supported types are:
Document type	• Article
	• FAQ
Enable	Allows you to enable or disable templates used by the authors. If templates are disabled all existing documents that are using templates will continue to function as is however authors will pat he able to
	create any new documents using this template.
Sections	Define the content parts of which the final document content is compiled. The order of these sections is essential. Knowledge Center uses a defined order to combine content together before showing it to an agent or a customer.
	Important Every template must have at least one section.

Field	Description
	For every section you are able to provide:
	 name - visible for authors only when editing the document in CMS
	 instruction - visible for authors only when editing the document in CMS
	 mandatory flag that will instruct CMS that document cannot be sent for approval until content for this section is provided.
	visibility rule
	Important At least one section in document must be mandatory.
	A section can be:
	• Public - visible to any user
	 Agents only - visible to any agent, but hidden when customer views the document
	 Skilled agent - visible to certain set of the agent that has one of the defined skills

While editing templates, you can:

• Add a section by clicking the **Add section** link:

Document section 1 C Mandatory Instruction Public Public	abled			
Document section 1 C Mandatory Instruction Public				
Document section 1 C Mandatory Instruction Public				
Instruction	Document section 1		Mandatory	
📽 Public	Instruction			
📽 Public				
	Public	•		
	n			
	tion			

• Delete a section by clicking: 🕙.

Document section 1	Optional	
Instruction		
Public v		
Document section 2	Optional	
Instruction		
♣ Skilled agent		
Document Section 3	Optional	
Instruction		
Public 🗸		
Document Section 4	Optional	
Instruction		
Public ~		

 change the order of the section by dragging and dropping them into the desired order. Hover your cursor over the

icon in front of any section then click, hold, and drag to the proper location, and then release your cursor.

Document sectio	n 1		Optional	
Instruction				
Public		v		
Document sectio	n 2		Optional	
Instruction				
Skilled agent		 Add Skill 		
Document Sectio	n 3		Optional	
Instruction				
Public		•		
Document Sectio	n 4		Optional	
Instruction				

Deleting templates

You can delete templates by selecting the template from the list and then clicking on delete button:



Important

You cannot delete a template that is used in a document within your knowledge bases. When trying to delete such a template, the CMS displays the following error message:



Rather than deleting such templates, you can disable them. This prevents the template from being used when creating new documents.

Tip

Disabling a template does not disable, hide, or remove any content from the Knowledge Base and the content can still be updated. Disabling a template only prevents the creation of new content with that template.

Important

Ensure that at least one template is created and enabled for every document type. Disabling all templates for certain document types disables the ability to add these documents to your knowledge bases.

Modifying templates

To modify a template, select the template and then click the **edit** button:

Templates		
Create - / E		
	0	м
Sindard FAQ		FAQ
Standard Article		ARTICLE
New Template		ARTICLE
-		

Alternatively, you can double-click on the template to enter edit view.

There are certain restrictions on the editing templates:

- The template **Id** and **Document type** can be defined before the template is created but cannot be changed afterward.
- **Sections** can be added and removed while there is no documents using this template. As soon as you have created at least one document using the template, you cannot add or delete sections within the document. You can however still change the order of the existing sections and change their attributes (such as **Name**, **Instruction**, **Mandatory** flag and visibility).

Templates that have restrictions on the modification will have special notice (1) shown when entering the edit mode:

A Fe	For this template, sections can no longer be added or removed as the template is already in use	
article	ieeditable	
Name		
Stand	- elard Article	
Descript	tion	
Stand	dard Article	
Docum	ment type	
Article	le la	
0 8	Enabled	
lections		
	Article content	
	Compile/author the most relevant information to match the topic or question and to guide the reader to the desired resolution or	outcome.

Using templates

When you add a document to the knowledge base you are able to select a template to use for that document.

1. From the *Documents* view click the **Create** button:



 From the Create document window, choose the Document type and Document template. Once these fields are chosen, the template information is shown on the right of the window (Template name and description, list of the sections with their names, instructions, visibilities):

Type of the new document	Selected template details
Article	Standard Article Standard Article Sections M Article content (mandatory) Compile/author the most relevant information to match the topic or question and to guide the reader to the desired resolution or outcome.
Cancel	04

3. Click **Ok** to create the document.

Importing templates

Cloning Template

To re-use an existing template to create a new one you must:

- 1. Open the list of templates.
- 2. Open the template you wish to clone.
- 3. Click the drop-down menu next to the **Save & Close** button.
- 4. Select **Backup configuration**:



5. The browser downloads a text file with the template configuration (name: templateId + ".template").



6. Go back to the **Templates** page.

Knowledge bases Create Import All	Administration	Templates	
Criste	* Knowledge bases	Coude -	
ImportARTICLE	Templates	Create	All All
57 August 198		import	ARTICLE
Standard PAQ PAQ		Standard FAQ	FAQ

8. Select **Browse**, choose the recently downloaded file in the open dialog window and then, click **Import**:

Import document template	×
Browse sample.template	
Cancel	

9. The new template form is opened and pre-filled with the values from the loaded knowledge base configuration.



Working with Content

Overview

You can use the authoring area to perform the following functions on the content stored in the CMS:

- Create or edit documents
- Create or edit categories
- Review feedback
- Check synchronization status

Important

To access this functionality you must have one of these CMS Authoring privileges:

- Knowledge.CMS.Category.Author
- Knowledge.CMS.Document.Author

For more information, see Access Permissions.

The authoring area



Selecting a language



Working with documents

Displaying documents

Select a knowledge base to display a list of its contents. If you select the default language, you can create documents and categories:

Genesys Knowledge Center	terCMS Knowledge bases -		¢	Ø → gkc_cms gkc_c
Documents	Create - P E T Review Approve -			Publish Q
Categories		🗢 🔶 Type	All Statuses 🗸 🚱 🤤	Modified T
Drafts	Can I use Genesys Knowledge Center as a virtual assistant?	FAQ	-0 -	3 hours ago
No answer	How can I set access control for my administrators and managers?	FAQ	-0 -	3 hours ago
Votes	How can I archive older knowledge base articles?	FAQ	-0	3 hours ago
Modifications	How can I add search capability to a custom agent desktop?	FAQ	-0	3 hours ago
	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	FAQ	-0 ~ ~	3 hours ago
	,	FAQ		3 hours and
alish				

If you select any other language, you can translate an existing document or category into the selected language:

ဗီ Genesys Knowledge Cer	nter CMS	Know	vledge bas	165 ▼					¢.	0 - g	kc_cms gkc_cms +
Center FAQ		Doci	umer	its							
Documents		Tra	nslate	P 🖥 Review Approve -						Publish	0
Categories			0	Question	•	Туре	All Statuses V	0	Ð	Modified	*
R. Drafts				Can I use Genesys Knowledge Center as a virtual assistant?		FAQ	-0		0	3 hours ago	
No answer				How can I set access control for my administrators and managers?		FAQ	-0		0	3 hours ago	
Votes				How can I archive older knowledge base articles?		FAQ	-0		0	3 hours ago	
MANIFARMS			_	ulastron?							
Base >		1-1	15 of 52	15 Y per nane				Page	1	of 4	
				La bu bala							

Creating a document

Create -	Click Create . Note: You can only create documents in the default language. Use other languages to translate existing documents.
× Select type of the new document Article Cancel Cancel	If your knowledge base allows documents of different types, you will be asked to select the document type. You can bypass this step by selecting the desired document type from the Create button's drop-down menu:

	Create Create Article Create FAQ Import
How to create new document?	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
Save & Close Save Discard & Close Discard	Click Save & Close or select one of the other options in the Save & Close button's drop-down menu.

Translating a document

	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
Save & Close Save Save Discard & Close Discard	Click Save & Close or select one of the other options in the Save & Close button's drop-down menu.

Document errors

When you save a document, the Knowledge Center CMS validates the values you have entered into its fields. It highlights any fields that contain errors by:

- Marking their borders in red
- Adding an error message below them

* Question	-	
	-	
Question field must be filled in	<u> </u>	

Document types

The Knowledge Center CMS supports two types of document:

- **Frequently asked questions (FAQ)**—A list of questions and answers, all of which can be commonly asked in a specific context and which pertain to a particular topic. This format is often used on mailing lists and in other online forums, where common questions tend to be asked repeatedly.
- Article—An independent piece of writing that provides information or evidence, or that serves as an official record.

Both types of document share the same structure, except for these fields:

	FAQ	Article
Document name	Question	Title
Short Summary (plain text)		Summary
Document content (formatted text)	Answer	Description
Alternative names	Alternative Questions	Alternative Titles

Viewing a document

To view the contents of a document, double-click the document in the list view or select the document and click $\ensuremath{\textit{View}}$:

Documents

Tran	slate	Review Approve -					Publish 📿
Ξ	0	Question ÷	Туре	All Statuses V	0	Ð	Modified \Leftrightarrow
		What is tags for?	FAQ	•	~	0	3 seconds ago
		How do I configure two Knowledge Servers into a cluster?	FAQ	∞		0	6 hours ago
		Can I use my own CMS system instead of the Genesys Knowledge Center CM	FAQ	-0-		0	6 hours ago

The document will look something like this:

What Is Genesys Knowledge Center?	o Approved
← / 亩 History	Publish
	reated 3 hours ago, last modified about 3 hours ago by default , 0 views
What Is Genesys Knowledge Center?	
Genesys Knowledge Center allows you to make the best use of your enterprise k reporting and basic analytics via Pulse and agent desktop integration to Worksr	esys products to provide configuration via Genesys Administrator,
Categories	
General	
Additional Channels any	

Document history

While you are viewing a document content, you can click the **History** button:

What Is Genesys Knowledge Center?	1
← /	
What Is Genesys Knowledge Center?	
Genesys Knowledge Center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of your enterprise knowledge center allows you to make the best use of you to make the best use of you to make the best use allows you to make the best u	owled
Categories	
General	1
Additional	L
Channels any	l
]

This displays all of the versions of the document:



Select a version to see its contents. A history drop-down menu shows which version you are looking at:

Historical version is shown. Draft, modified by default about 19 days ago What Is Genesys Knowledge Center?	Created 19 days ago, last modified about 17 days ago by default , 8 views
Historical version is shown. Draft, modified by default about 19 days ago What Is Genesys Knowledge Center?	
What Is Genesys Knowledge Center?	
Genesys Knowledge Center allows you to make the best use of your enterprise know to var reporting and basic analytics via Pulse and agent desktop integration to Workspace D	rious Genesys products to provide configuration via Genesys Administrator,
Categories (in English)	
General	
Custom attributes	
Agent	
Internal	

Each line in the history drop-down shows the following information about the version:



- Approval status (1)
- How many days ago the version was created (2)
- Publication status. (3) The published version is indicated by an agent icon on the right.

Comparing document versions

While editing a document you can compare the current version with any other version by clicking **Compare**:

Compare	English	~	19 days ago	~
---------	---------	---	-------------	---

Select the desired language and version from the drop-down lists that appear.

This mode is helpful when you want to:

• Compare the current version with a previous version

- Copy content from a previous version
- Localize a document from one language to another

Compare mode displays the older version and the current version side by side:

What Is Genesys Knowledge Center?

Click the Copy button (1) near a field to copy its value from the older version to the current one.

Working with Categories

Displaying categories

Click **Categories** in the sidebar to open the category tree for the selected knowledge base:

°00 6	enesys Knowledge Ce	enter CMS	Knowled	ge bases 🕶	
1	Knowledge Center FAQ		Categ	ories	
	Decuments		Create	Review Approve - % III	
Ľ	Categories			Name	
R .	Drafts			~ General	7
2	No answer			Archiving	L
	votes			~ Configuration	
Ð	Modifications			Languages	
				Roles	
				Feedback	
			-		7

Creating a category

Create -	Click Create . Note: If you select a category from the category list before clicking Create , the new category will be created as a child of the category you selected.
Categories Mame Categories Description Working with Categories Parent category / No parent assigned	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
Save & Close Save Save Discard & Close Discard	Click Save & Close or select one of the other options in the Save & Close button's drop-down menu.

Category errors

When you save a category, the Knowledge Center CMS validates the values you have entered into its fields. It highlights any fields that contain errors by:

- Marking their borders in red
- Adding an error message below them



Viewing a category

To view the properties of a category, double-click the category in a list view or select the category and click **View**:

ဗိ Genesys Knowledge Center CM	S Knowledge ba	ises 🕶
Center FAQ	Categori	es
Categories		Name
Drafts		∽ General
 No answer Votes 		Archiving
Modifications		~ Configuration
		Languages
		Roles

The category will look something like this:

Genesys Knowledge Center Server	Approved
← /	
	ი, last modified about 19 days ago by default
Name	
Genesys Knowledge Center Server	
Parent category	
Server	
Documents in this category	
Are there limitations on what and how many sources the CMS can index	
Can I offer a chat session when negative feedback is provided by the use.	
Can I prevent customers from seeing certain knowledge base articles?	
Can I prevent Knowledge Center from answering certain questions?	
Can I restrict access to the knowledge base to my agents only?	
Can I search for knowledge base articles in French or other languages?	
Can I store knowledge articles in different languages?	

In addition to its properties, you can see a list of the documents that belong to the category. Click a document's name to open it.

Category history

While you are viewing a category, you can click the **History** button:

Genesys Knowledge Center Server	
← /	1
Name	
Genesys Knowledge Center Server	l \
Parent category	
Server	
Documents in this category	}
Are there limitations on what and how many sources the CMS can index information	tion fr
Can I offer a chat session when negative feedback is provided by the user?	/
Can I prevent customers from seeing certain knowledge base articles?	/
Can I prevent Knowledge Center from answering certain questions?	{
Can I restrict access to the knowledge base to my agents only?	Į
Can I search for knowledge base articles in French or other languages?	\backslash
knowledge articles in	<u>}</u>

This displays all of the versions of the category:



Select a version to see its contents. A history drop-down menu shows which version you are looking at:



Each line in the history drop-down shows the following information about the version:



- Approval status (1)
- How many days ago the version was created (2)

Comparing category versions

While editing a category you can compare the current version with any other version by clicking **Compare**:

Compare	English	~	19 days ago	~
---------	---------	---	-------------	---

Select the desired language and version from the drop-down lists that appear.

This mode is helpful when you want to:

- Compare the current version with a previous version
- Copy content from a previous version
- · Localize a category from one language to another

Compare mode displays the older version and the current version side by side:
Archiving			-	Approved
← 🗉 📋	Compare English	- ○ - 19 days ago ~	S	ave & Close 🗸 👻
Name		(1) >> * Name	2	
Archiving		Arch	iving	
Description		>> Descrip	ation	
Parent category				
🙁 General				

Click the Copy button (1) near a field to copy its value from the older version to the current one.

Approval workflow

Documents and categories share the same approval workflow, which consists of 4 states:

•	Draft —authoring is in progress.
-0-	In Review —the category is ready for approval review.
0	Approved —the category is ready to be published to the server so it can be used by Knowledge Center.
8—	Rejected —the category has been reviewed and rejected—it requires further editing before it can be resubmitted for review

Let's look at an example of this workflow:



Would you like to initiate review? * Write a comment * No Yes	Once you have reached the final version and are ready to send your document or category for review, click the Review button. The category or document is now in In Review status. You can also submit comments to the reviewer to explain the changes that you made and why they should be approved. Note: The comments you enter here are only visible in the document history. They are not exported into the Genesys Knowledge Center Server and are not visible to agents and customers using the knowledge.
In review	When you review a category or document that has a status of In Review , you can approve the changes—using the Approve button—or reject them—using the Reject button. You can also provide your comments, which can be seen in the History view for the category or document. Note: If you change the contents of the category or document and then save it, it will receive a status of Draft , which means the approval workflow will be restarted.
	Once the category or document has been approved by the reviewers, it has a status of Approved . It can now be published to the Knowledge Center Server for use by agents and customers. Note: If you change the contents of the category or document and then save it, it will receive a status of Draft , which means the approval workflow will be restarted. Agents and customers can still use the latest approved version of the category or document while the newer version is being evaluated.
8 Rejected	Rejected categories or documents have a status of Rejected . They must to be corrected and then resent for review and approval.

This state diagram gives an overview of the entire process:



You can change the status of individual documents or categories, as described above, or as a bulk operation:

- Select the desired categories or documents from the list.
- Click the desired status (**Review**, **Approve**, or **Reject**) in the toolbar.
- The operation you have chosen will only be applied to any of the selected documents that are in the appropriate state. For example, if you select **Review**, it will only be applied to the documents that are have a status of **Draft** or **Rejected**.

Working with Customer Feedback

Processing a "No answer" Item

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.
- Knowledge.Author privileges have been assigned to the user.

Start

- 1. Select a knowledge base to display a list of its contents.
- 2. Choose the **No answer** tab.

Knowledge Center FAQ	Queri	ies withou	ut answer	
Dashboard	ā	Search	Create documen	
Documents		From date	To date	Query
Categories		2019-01-24 15	5:25:12	sears
No answer		2019-01-23 18	3:06:59	merge
Drafts		2019-01-23 17	7:37:07	genesys
Modifications		2019-01-23 17	:35:44	merge
		2019-01-23 17	:35:36	Genesys
-		2019-01-23-1-	-	

- 3. Choose one or more items from the list.
- 4. Process each item:

Genesys Knowl	edge Center CN	Ner CMS Knowledge bases + Dictionaries + Queries without answer					
Cashboard		Ô	Search	Create docum	sent		
Documents		⊟	From date	To date	Query		
Categories			2019-01-24 1	5:25:12	sears		
No answer No answer			2019-01-23 1	8:06:59	merge		
Drafts		V	2019-01-23 1	7:37:07	genesys		
Modifications			2019-01-23 1	7:35:44	merge		
			2019-01-23 1	7:35:36	Genesys		
			2019-01-23 1	7:35:30	genesys		
-	-		2019-01-23 1	7:19:22	merge	1	

Search for similar existing questions using the **Search** button.

Knowledge Center FAQ	Docume	ents	
Dashboard	Create	🔹 🖍 🗵 📋 Review Approve 🖌	
Documents	. 0	generation 🖌 🕴	
Categories		Can I do Search Engine Optimization for articles creater to Generays Knowledge C	FAQ
No answer		Why do I need the Generation Knowledge Center CMS?	FAQ
Drafts		What Is Genesys Knowledge Center?	FAQ
) Modifications		What is the Sample UI?	FAQ
		How does Genesys Knowledge Center find the right answers to my questions?	FAQ
		Can I use Genesys Knowledge Center as a virtual assistant?	FAQ
		What is the difference between the Knowledge Cluster and the Knowledge Server?	FAQ
		Why is the correct answer shown as the second item in the list of answers?	FAQ

• Click the **Create document** button and create a new document based on the **No answer** item.

(2) 0	Knowledge Center FAQ Destboard	genesys er tour
0 4 0	Documents Categories No answer	No collegaries antigment
2 R 0	Votes Drafts	*Gention geospi
		$ \begin{array}{c} \begin{array}{c} \begin{array}{c} \begin{array}{c} \end{array}{ \hline \ } \end{array} \\ \begin{array}{c} \begin{array}{c} \end{array} \\ \begin{array}{c} \begin{array}{c} \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \begin{array}{c} \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c} \end{array} \\ \end{array} $

• Delete unnecessary items using the **Delete** button.

End

Processing Votes

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- Knowledge.CMS.Document.Author privileges have been assigned to the user.

Start

- 1. Select a knowledge base to display a list of its contents.
- 2. Choose the **Votes** tab.

Center FAQ	Votes	S			
Dashboard		From date To date	Document Question	All types \sim	Rating
Categories		2019-02-10 11:42:03	How does my feedback	9 1	
Votes		2019-01-11 15:32:27	Can I do Search Engine	:4	
Drafts		2019-01-11 15:32:14	Can I do Search Engine	, é	
Modifications		2019-01-11 15:31:17	Why aren't any results re	16	

- 3. Choose one or more items from the list.
- 4. Process each item:

Center FAQ	Votes				
Dashboard	e 5				
Documents	View From date To date	Document Question	All types $-\sim$	Rating	Query
Categories	2019-02-10 11:42:03	How does my feedback	* '		help
No answer	2019-01-11 15:32:27	Can I do Search Engine	.4		search data
Votes	2019-01-11 15:32:14	Can I do Search Engine	.4		search data
Madfeeting.	2019-01-11 15:31:17	Why aren't any results re	.4		search data
mouncations					

Center FAQ	Is agent feedback treated differently from customer feedback?
Cashboard	Create document
Documents	
Categories	Note Raing
P No answer	Customer comment Very good search results
😼 Votes	Is agent reconcise rated anterently from customer feedback?
Drafts	▲ less than a minute of reading / 60 words
Modifications	Both agent and customer feedback allow Knowledge Center to improve the quality of its responses. However, in most cases, agent feedback is consi which agents can help create and improve knowledge via the Workspace plugin and the Knowledge Center CMS. Refer to the Knowledge Center Use
	Categories (in English)
	~ General
	Feedback
	✓ Solutions
	 Server Generum Konsularites Center Server
	Unitarya Antoninage Center Server
	Additional
	Channels any

Add a search query as an alternative question for the upvoted document using the Add as
alternative button. Or Edit existing document. Or Create new document basing on search query.



g Denersys Knowledge Center D	MB Kreenholp haves = Deformales = 0 = deformales = 0 = deformales = 0	
Center FAQ	Is agent feedback treated differently from customer feedback?o Published	
Deshibitant Decuments	4 B E Company Bytes + Fand +	
Categories	Both agent and customer heefback allow Knowledge Center to improve the quality of its responses. However, in most cases, agent feedback is considered to be more reliable.	
Votes	mere an ann mary way in which agents can help create ant reprove momentar na me Workgace page and the Robuilding Carter CMS. Relet to the Robuilding Carter User's Guide for more elemation.	
🕅 Drafts		
U Manazoni		
	×	
	Alternative Questions is agent Freedback treated differently from cualizance Reedback? Add alternative question	
	hpi	
	Add Tag	
Cogesh -		
	Pygerties	- 1

• Delete appropriate items using the **Delete** button.

End

Processing Drafts

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.

• Knowledge.CMS.Document.Author privileges have been assigned to the user.

Start

- 1. Select a knowledge base to display a list of its contents.
- 2. Choose the **Drafts** tab.



- 3. If any drafts are awaiting review, they are present under this tab.
- 4. Process each item: Create a new document or Delete a draft.

Center FAQ	How do I understand risks and rewards and investment planning?	e Draft
Deshboard	+	Save & Close -
Documents Categories	Contrilian View dis I understand risks and research and investment abandoud	
No answer Votes Drafts	Answer A	
Modifications	X 0 0 0 I 0 I 0	it touros <u>D</u> <u>24</u>

End

Publishing

Overview

The publishing process ensures that data authored and approved in the CMS is available for your agents and customers. During the publishing process, all approved documents and approved categories are transferred from the Knowledge Center CMS to the Knowledge Center Server. As soon as these documents are transferred to Knowledge Center Server they are immediately available for searching by your agents and customers.

There are several ways to publish your documents. You can:

- Publish from the document list
- Publish from the document view
- Publish from the modification menu
- Configure scheduled publishing (synchronization)

What version of the document is published?

There are several key rules of document versioning for publishing:

- Only the approved version of the document is published
- If the document has several approved versions, the most recent approved version is selected for publishing
- If the latest approved version of the document has the **Expiration date** defined and that date has passed, the document is not published

Publishing documents

In some cases, you might need to publish only certain select document(s). In this case, you can publish a document from the same location it is being authored.

Publishing from document list

- 1. From the left-hand sidebar menu, click **Documents**.
- 2. Select the documents to publish, then click **Publish**.

Knowledge Cent	ter CMS Knowledg	yr basen =				0	0 - pt	t.ome g
owledge nter FAQ	Docum	nents						
cuments	Onate	🔹 🖌 🗄 🗶 Tanlar Approx -					Publish	C
tegories		0 Question	Тури	All Statuses 🔍 🗸	0	o	Modified	
ns -	8	Can I use Genesys Knowledge Center as a virtual assistant?	FAQ	-0	~	~	3 hours ago	
anower	8	How can I set access control for my administrators and managers?	FAQ	-0	~	~	3 hours ago	
		How can I archive older knowledge base articles?	FAQ	-0	~	~	3 hours ago	
Incations		How can I add search-capability to a custom agent desktop?	FAQ	-0	~	~	3 hours ago	
		Can I do Search Engine Optimization for articles created in the Generate Knowledge Center CMS?	FAQ	-0	~	~	3 hours ago	
		Can'l have my CMS store content in a database or other data store?	FAQ	0	~	~	3 hours ago	
		is agent feedback treated differently from customer feedback?	FAQ	-0	~	~	3 hours ago	
		Can I prevent Knowledge Center from answering certain-questions?	FAQ	0	~	~	3 hours ago	
		Why do I need the Workspace plugis?	FAQ	-0	~	~	3 hours ago	
		Why aren't any results returned from my query?	FAQ	-0	~	~	3 hours ago	
		How does my feedback help Genesys Knowledge Center?	FAQ	-0	~	~	3 hours ago	
		Do the Knowledge Center DMS and the Knowledge Center Server use the same data?	FAQ		~	~	3 hours ago	

3. Confirm the operation in the dialog window by clicking **Publish** once more.

Selected documents will be published to English language		×
Cancel	Publish	

At the bottom of the screen, you will first see a notification that your document(s) are being published :

1 notifications	Hide All
Publishing data	×

Finally, you will see the notification confirming the document(s) are published:



Publishing from document view

- 1. From the left-hand sidebar menu, click **Documents**.
- 2. Double-click the document you wish to view.
- 3. From the document view form, click **Publish**.

-		
Center FAQ	Can I use Genesys Knowledge Center as a virtual assistant?	Ø Approved
Documents	+ / B Hintery	Publish
Categories		Created 3 hours ago, last modified about 3 hours ago by default , 0 views
Drafts Drafts No answer Ter Votes	Can I use Sensarys Knowledge Center as a virtual assistant? iii Sensarys Knowledge Center will be information source for initial assistants. But it is not a virtual assistant itself. It can help an existing or 3rd Party virtual assistant field the best answer to a question. Categories	
O Modifications	General	
	Additional Charsels any	

Publishing modified documents

Accessible from the left-hand sidebar menu, the **Modifications** view allows you to see the changes (approved and deleted documents) that are awaiting the next cycle of scheduled publishing (synchronization). Here you can enforce synchronization by clicking the **Synchronize** button.

Important

When you click the **Synchronize** button you instruct the Knowledge Center CMS to immediately execute the synchronization process of all changes in the **Modifications** view to the Knowledge Center Server. This means that all approved documents are published to the Server and all deleted documents are removed from the Server.

	Denter CMS	Encode 1	dga bases +		0	- 0- pt.	ome gint,
Knowledge Center FAQ		Modif	fications				
Documenta		в				Synchronize	0
Categories		R	The	Language	Type	Mudified	
Drafts		R	Can I use Senergis Knowledge Center as a virtual assistant?	English	APPROVED	40 seconds ago	
No answer		8	Now can I set access control for my administrators and managers?	English	APPROVED	3 hours ago	
YONS		R	How can I archive older knowledge base articles?	English	APPROVED	3 hours ago	
Modifications		8	Now can I add search capability to a custom agent desktop?	English	APPROVED	3 hours ago	
		R	Can I die Search Engine Optimization for articles created in the Generys Knowledge Center CMID?	English	APPROVED	3 hours ago	
		8	Can I have my CMS store content in a database or other data store?	English	APPROVED	3 hours ago	
		8	Is agent feedback treated differently from customer feedback?	English	APPROVED	3 hours ago	
		B	Can I prevent Knowledge Center from answering certain questions?	English	APPROVED	3 hours ago	
		8	Why do I need the Workspace plugin?	English	APPROVED	3 hours ago	
		×	Why aren't any results returned from my query?	English	APPROVED	3 hours ago	
		8	How does my fwedback help Generys Khowledge Center?	English	APPROVED	3 hours ago	
		×	Do the Knowledge Center CMS and the Knowledge Center Server use the same data?	English	APPROVED	3 hours ago	
		B	How long is information stored in the Natorical database?	English	APPROVED	3 hours ago	
		8	What reporting data is available in the Pulse plugin?	English	APPROVED	3 hours ago	
		R	Does Generys Knowledge Center know how much time a person spends reading each article?	English	APPROVED	3 hours ago	

To complete the process, you are asked to select which language(s) are to be used for the synchronization.

		×
	Knowledge base synchronization	
	Languages for synchronization	
	All languages	
	German	
V	English	

Scheduled publishing (synchronization)

Synchronization is a convenient and reliable way of making documents available for use. It is strongly encouraged to set up a synchronization schedule according to your needs. This will ensure all the approved content is available in a timely manner.

Important

Synchronization can be configured for **Content source: CMS** knowledge bases only.

To edit synchronization options you need to expand **Properties** at the bottom of the Knowledge Base form.

Enabling Synchronization

To enable synchronization:

- 1. Expand **Properties** in the bottom of the Knowledge Base page.
- 2. From the **Synchronization** section:

Automatic synchronization disabled	Automatic synchronization disabled (default) - disable synchronization
Automatic synchronization enabled	Automatic synchronization enabled - enable synchronization

Synchronization Schedule

The following synchronization schedules are supported:

Scheduling		
Hourly	Repeat every 1 hour(s) at 0 minute(es)	
Jaily - select time		
Scheduling		
Daily	✓ Start at 9 00 AM	
Veekly - select weekdays and time		
Scheduling	Dava of work	
Weekly	Sunday	· · · · · · · · · · · · · · · · · · ·
	Start at 9 : 00 AM	
fonthly - select day of the month and time		
/lonthly - select day of the month and time scheduling		
Aonthly - select day of the month and time scheduling Monthly	→ Day of month 1	
Nonthly - select day of the month and time Scheduling Monthly	→ Day of month 1 Start at 9 : 00 AM	
Nonthly - select day of the month and time Scheduling Monthly	Day of month 1 Start at 9 00 AM	
Anothly - select day of the month and time Scheduling Monthly Dnce a year - select month, day of the month and time	Day of month 1 Start at 9 00 AM	
Monthly - select day of the month and time scheduling Monthly Drace a year - select month, day of the month and time scheduling	 ✓ Day of month Start at 9 200 AM 	
Monthly - select day of the month and time scheduling Monthly Drace a year - select month, day of the month and time scheduling Once a year	 ✓ Day of month Start at 9 ₹ 00 AM ✓ Month January 	
Vonthly - select day of the month and time scheduling Monthly Droce a year - select month, day of the month and time scheduling Once a year	 Day of month Start at 9 00 AM Month January Day 1 	

Synchronized Content

Attachment synchronization

Synchronization

....

Attachments synchronization	
Disabled	~
Disabled	
Only URL	
URL and content	

- Disabled attachments are not by synchronized to the Knowledge Center Server
- **Only URL** link to attachment and attachment name is synchronized to Knowledge Center Server. Attachment content remains in Knowledge Center CMS.
- **URL and content** link, name, and attachment content is synchronized to the Knowledge Center Server; content is used by Server for search only. To download file, Knowledge Center CMS is used.



For successful attachment download from Knowledge Document option **externalURL** in section **cms.general** in **Application Cluster** should be correctly configured and point to Knowledge Center CMS URL (such as, http://<cms host>:<CMS default port>/gks-cms)

Synchronized Languages

Languages for synchronization: all	(Default) Synchronization enabled for all languages within the knowledge base
Languages for synchronization: selected	Languages that need to be synchronized (needs to be selected from the list of supported languages by knowledge base):

Using the Pulse Plugin

Overview

Genesys Knowledge Center Plugin for Pulse plugin allows you to add knowledge-centric statistics to your existing dashboards.

Plugin provides 2 widgets:

- Dashboard: containing a set of pre-configured statistics that are embedded into the main pulse dashboards along with other measures of your environment.
- Expanded: Kibana-based widget that allows dynamic data discovery when you expand the widget.

To add widgets to your pulse dashboard please follow the steps described in the Deployment Guide.

Dashboard widget

The Dashboard Widget provides a small component with major knowledge KPI that is embedded into the pulse dashboard along with other environment metrics and statistics. The Widget shows the information for a particular knowledge base within a specified period of time from now. KPIs shown on the widget are:

- Search number of search requests executed
- Feedback % of the search request that users provided feedback on (both relevancy and 5 star-rating feedback)
- No answer- % of the search queries that end up with indication that no answer had been found
- Average Confidence average confidence of the first documents returned on the search requests
- Sentiment % of 'like' feedback

enesys Knowledge	
KnowledgeFAQ	
Search	1327
Feedback	8.21%
No Answer	11.98%
Average Confidence	0.56
Sentiment	83.72%

Pulse Plugin Displaying KPIs

Expanded widgets

When you expand the Knowledge Center dashboard Widget to the full tab mode you will see either the Analytics Expanded Widget or the Performance Expanded Widget, enabling data discovery and analysis within your cluster. The Widgets are based on Kibana and deliver all of Kibana's power for data analysis.

Analytics Widget

The goal of the Analytics Widget, intended for use by supervisors and content managers, is to help you visualize how data is used in the enterprise by focusing on the most frequently used content and questions that fail to yield an answer. This widget can also be used to analyze data within a particular knowledge base, language, or location.

aly Trend =	Real Property and the second second																
	Events Over Time																
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6.25% (DORD)	2												Δ				
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Analytics Widget Dashboard

Let's see what each part of the dashboard means:

• The timeline, which includes a histogram, enabling you to monitor the daily trend of knowledge requests that you can then sort by type over a selected period of time. Note: If you select a period of time that is less than one day, the trend will not be displayed. If you would like to look at a specific trend you can select it on the histogram and the widget will adjust to display the specific activity that occurred over the selected time frame.

Daily Trend	Events Ove	er Time									
• 6% (ALL)	Vew > I 9, 2s	em Out I									
• 6.25%	-								٨		
(SEARCH)	10								A		
 8.33% (DPEN) 	16.00	90.00 00.18	08.00 09.10	16.00	40.00 60.10	08:00 08:10	16.00 05.13	00.00 00.20	98.90 98.22	14,00 00.20	00:00

Analytics Widget Timeline

• The confidence panel displays knowledge event trends for the last hour of a selected time period while the histogram shows the mean confidences for the answers that came back to users first.

Hourly Trend	Mean Confi	dence									
 6% (ALL) 6.25% (SEARCH) 8.33% (DPEN) 	View > Q, 21m 100 075 050 025 050 050 0617	e-Dut 00-00 00-10	04.00 04.13	16.00 (8-10	80.00 19-19	08-00 09-19	1440 1913	0000 0820	68.50 09.20	14.00 04.00	00-00 09-21

Analytics Widget Confidence Panel

• The world map in the geography panel is covered with heat maps that demonstrate requests based on location. Note: You can click heat points to zoom into particular regions more closely.

Warning

Please see Install Genesys Knowledge Center Plugin for Pulse for important details on the World Map Widget and a change in Map Quest's Terms of Service that might affect this feature.



Analytics Widget Geography Panel

• The analytics panel depicts a distribution of events that can be sorted by type, knowledge base, language, origin (an agent vs a customer), sentiment (percentage of positive and negative likes), country, rating and sources of requests. Note: You can click a category to zoom into a particular segment of events.

The following types of events are shown on the **Events** pie:

- · search number/percent of search request to the total request count
- · open number/percent of opened documents to the total request count
- feedback number/percent of the user feedback provided (both relevancy feedback and 5-star ratings) to the total request count
- nonanswered number/percent of the explicit or implicit queries that end up with no results or with irrelevant results to the total request count
- use number/percent of time that knowledge was used to serve customer interaction to the total request count



Analytics Panel

- Use this counter panel to visualize the most significant requests for:
 - search quantity of search requests
 - open quantity of knowledge articles opened by users
 - no answer quantity of queries the system captured for which there was no answer
 - · feedback the amount of positive/negative feedback left by users
 - rating quantity of comments left by users
 - used quantity of knowledge articles used by agents to answer customer's questions

SEARCH	-	VIEWED	-	NO ANSWER	POSITIVE	-	NEGATIVE	COMMENT	
17		26		2	7		1	1	

Visualize the Most Utilized Content and Feedback

- The trend panel enables you to analyze customer queries for the top ten most:
 - viewed documents
 - viewed categories
 - liked documents
 - used keywords

Top 10 Documents		-	Top 10 Categories			Top 10 Liked			Top Keywords		
Tenm	Count	Action	Term	Count	Action	Term	Count	Action	Term	Count	Action
What types of events does Denesy a Knewinder Center month is the h	3	9.0	Generative Knowledge Center Server	19	9.0	What types of events does Genesy a Knowledge Center second in the b	1	9.0	knowledge	10	9.0
storical database?			Generays Knowledge Center CMS	13	9.0	istorical database?			generys	4	9,0
What is the difference between the chroaledras Chaster and the Khowie	3	9.0	Hatory	4	9,0	How should I ask questions?	1	9.0	center	4	9.0
ige Server?			Generays Knowledge Center Works	4	9,0	Can agents add new documents to the increase increase.	1	9.0	base	4	9.0
Can agents add new documents to he knowledge base?	3	9.0	General		9.0	Can I use my own CMS system ins		9.0	cluster	3	9.0
kre there limitations on what and h	3	9.0	Configuration		9.0	tead of the Genesys Knowledge Ce rder CMS?			agent	3	9.0
ow many sources the CNIS can ind to information from?			Administrator for Generava Knowle	2	0.0	Can I search for knowledge base an	1	9.0	type	2	9.0
tow should Lask questions?	2	9.0	dge Center			ticles in French or other language s?			server	2	9.0
How do I configure two Knowledge	2	9.0	Languages	1	9.0	Can I restrict access to the knowle	1	9.0	record	2	9.0
Servers into a cluster?						dge base to my agents only?			event	2	9,0
Can I use my own CMS system ins load of the Genesys Knowledge Ce	2	9.0				Can I have my CMS store content i n a database or other data store?	1	9.0	document	2	9.0
Iter CMS?									difference	2	9.0
Mhy do I need the Workspace plugi d	1	9.0							database	2	9,0
What are oustom fields?	1	9.0							data	2	9.0
fow long is information stored in t	1	9.0							test	1	9.0

Analytics Widget Displaying Trends

By default the dashboard is collapsed, but it can be expanded to see the details of each event:

Expand the Widget to View Details

Performance Widget

The Performance Widget, intended for use by administrators, focuses on the mean processing times for user requests based on their distribution between servers, knowledge bases, and location.



Analytics Widget Timeline

Let's take a look at each part of the dashboard:

• The timeline, which includes a histogram, enables you to monitor the daily trend of knowledge requests that you can then sorted by type over a selected period of time. Note: If you select a period of time that is less than one day, the trend will not be displayed. Also, if you would like to look at a specific trend you can select it on the histogram and the widget will adjust to display the specific activity that occurred over the selected time frame.

L	Daily Trend	 Events Ove	er Time									-
	 6% (ALL) 6.25% 	Vew > 9,20	em Dut I							٨		
	(SEARCH) • 8.33% (DPEN)	20 10 10 10 10 10 10	800	08.00	16.00	8208	0810	16.00	-	A	16,00	0000

Analytics Widget Timeline

• The processing time panel displays the mean processing times of agent and customer requests over a selected period as well as an accompanying histogram.

Pro (M	ocessing s)	Time		Mean P	Mean Processing Time (Ms)										-	
	211	(near)		Vew 3 4 2000	9, 2008 Gar 4	🕈 ALL (12) 🗣 SE	ANCH [3] @ OPI	04 (0) 🗢 UHED-(1) duration mean	.ger 10m ((24 %)	°					
		min	-										-			
٠	ALL.	0	1,303		14.08 00.00	18/00 09/30	20.08 08-29	22.90 08.20	00.00 00-21	42140 48-21	94.28 96.21	04.00 04.21	08:20 09-21	10.00 68.21	12.90 98-21	14.00

Performance Widget Time Processing Panel

• The world map in the geography panel is covered in heat maps depicting requests based on location as well as the top 10 IP addresses of the customers who are creating those queries.



Performance Widget Geography Panel

• The analytics panel displays a distribution of events that can be sorted by type, knowledge base, language, origin (an agent vs a customer) and country. Note: You can click a category to zoom into a particular segment of events.

l	Server	-	Events		Knowledge Base	-	Language	-	Originator	-	Country	-
				-							a n	
	Samalan Long Long Kat 197		an m		Lumingeda Jan		iii.		CUETOMEN 1994			a se

Performance Widget Analytics Display

• The default mode of the Performance Widget displays a collapsed version that can be expanded to see the details of any event:

		0 to 10 of 13 available for paging			*
99 >	< query.comy >		< timestamp >	< evenend >	< knewledgebooetd
ENRCH	phys		2015-06-21 15:31:50		knowledgelag
PON			2015-08-21 15:31:47		knowledgefaq
CHANGWERED			2015-09-21 15:31:44		knowledgefaq
EARCH	Do the Knowledge Denter DMS and the Knowledge Denter Server		2015-08-21 15:31:44		knowledgefag
CHANGWERED			2016-08-21 18:31:39		knowledgetag
EARCH	test		2015-09-21 15:31:39		knowledgefaq
EEDBACK	How can I assign Generys Knowledge Denter Plugins to my agen		2016-08-21 18:31:36		knowledgefaq
PEN			2015-00-20 15:31:34		knowindgefaq
EAACH	How can I assign Genergy Knowledge Denter Physics to my ages		2016-06-21 15:31:32		knowledgelag
PEN			2018-06-21 16:31:26		knowledgefaq

Expand Performance Widget to see Details

Widget Time Frame Display

The following panels, found in both the Analytics Widget and the Performance Widget, can be used to filter the appearance of your data.

Knowledge Center		Aug 17, 2013 14, 4654 to Aug 27, 2015 49,3258 releasing every lin x 🔹 O 🔹 🖒
Field 2		
time mut Ø X time	nut Ø SX tems <u>tuel</u> Ø	/8x °
Reld moment Reld Bran I now Tax Bran	"2015-00127214554.1952" Value : CUSTOMO	
to now to 12	2015-08-21118-32-53.7402*	

Panel Above Dashboard

• The display above, found on top of the dashboard, contains filters that can be used to modify your current data to:

Fi	itering >					
	time must field : moment from : now-1 w to : now	XX	time must field : moment from : "2015-08-17T21:45:54.1602" to : "2015-08-21T10:32:53.7402"	¥ ⊻	terms must	⁄⊻x

```
Dashboard Filters
```

- view active filters (the filter can be removed by pressing the X or temporarily deactivated after deselecting the box)
- refresh data
- use the home button to reset the dashboard to its default settings
- select time frames for the menu



Select a Time Frame to Analyze