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Genesys Knowledge Center User's Guide

Knowledge Center 8.5.3

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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

Working with Knowledge Center Plugin for Genesys Workspace Desktop Edition

[Knowledge Center Plugin for Workspace Desktop Edition](#)

Authoring

Learn how to use Knowledge Center Content Management System (CMS)

[Using the CMS](#)

[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

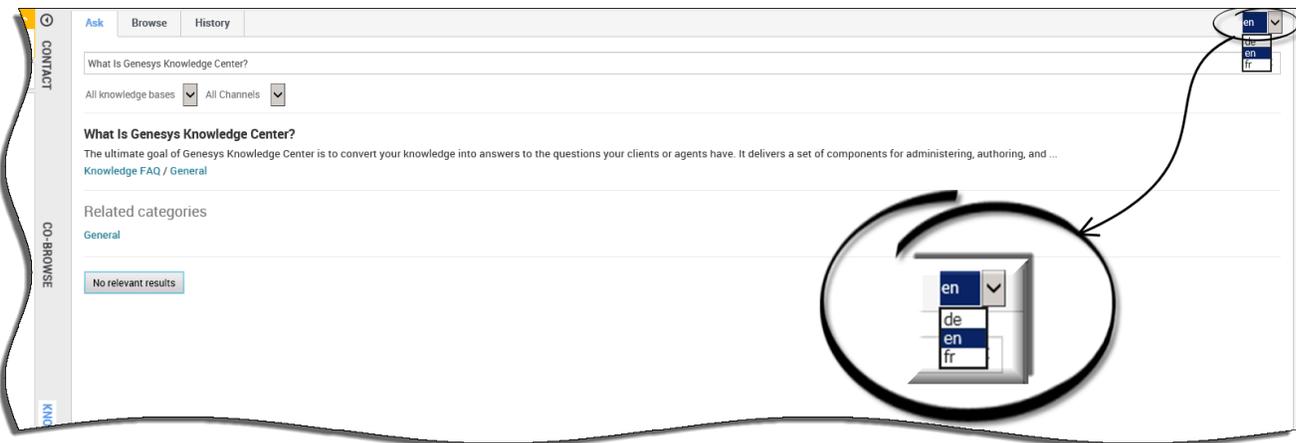
- *Statistics:*
 - [Review document data](#)
- *Browsing:*
 - [Browse the Knowledge Base using Categories](#)
 - [Browse a customer's search history](#)
- *Favorites:*
 - [Browse Favorites](#)
 - [Add and remove Favorites](#)
 - [Browse Favorites by category](#)

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

Important

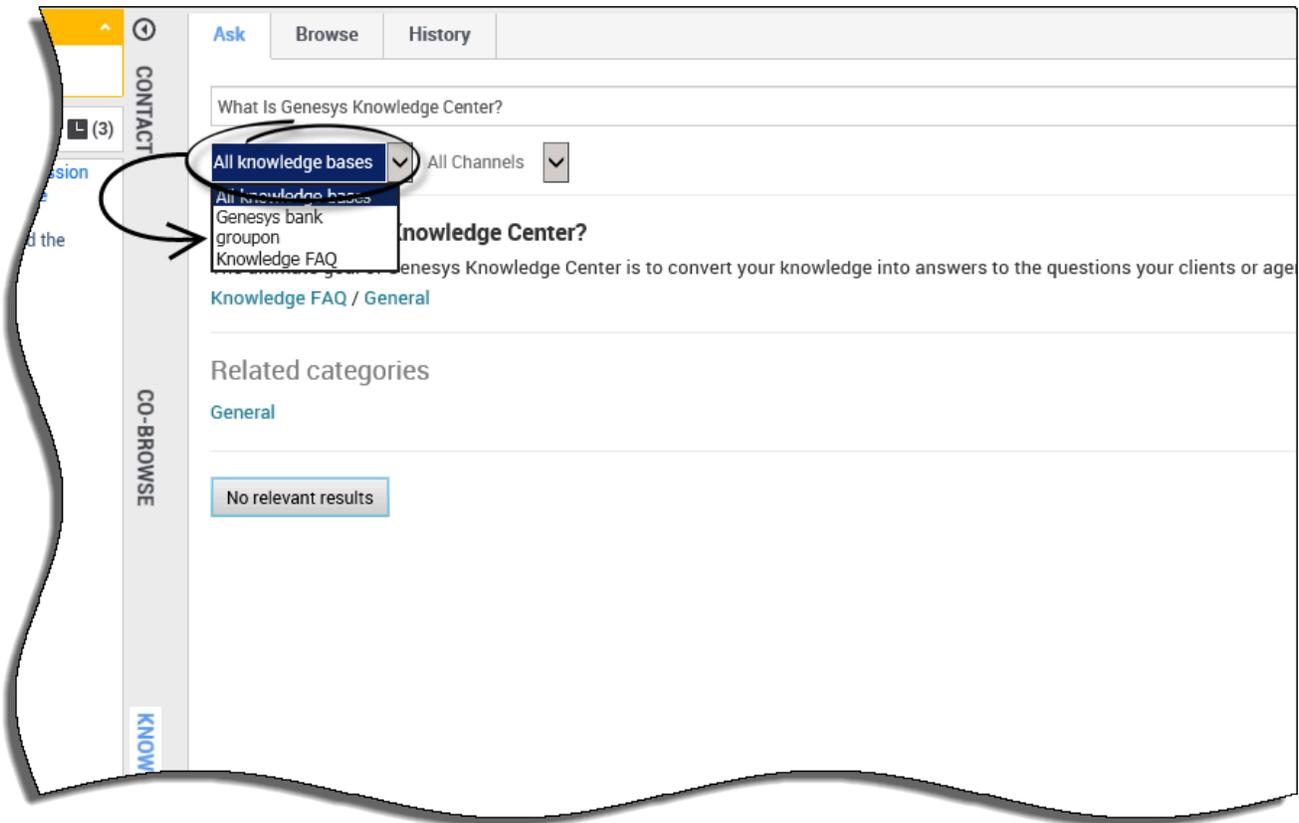
To work with Knowledge Center plugin the agent must have **Knowledge.Worker** privileges.

Selecting a Language



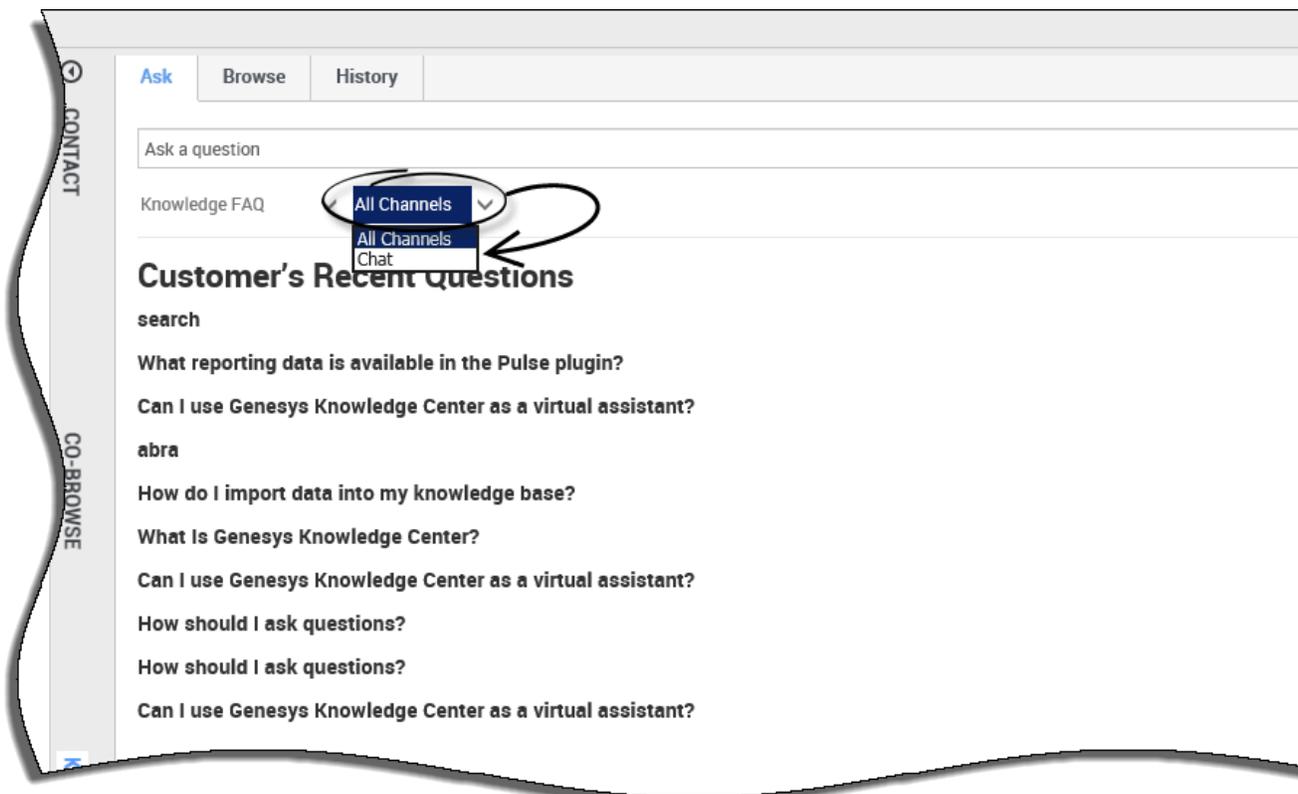
To select a language, click the language menu and choose your language from the list.

Selecting a Knowledge Base



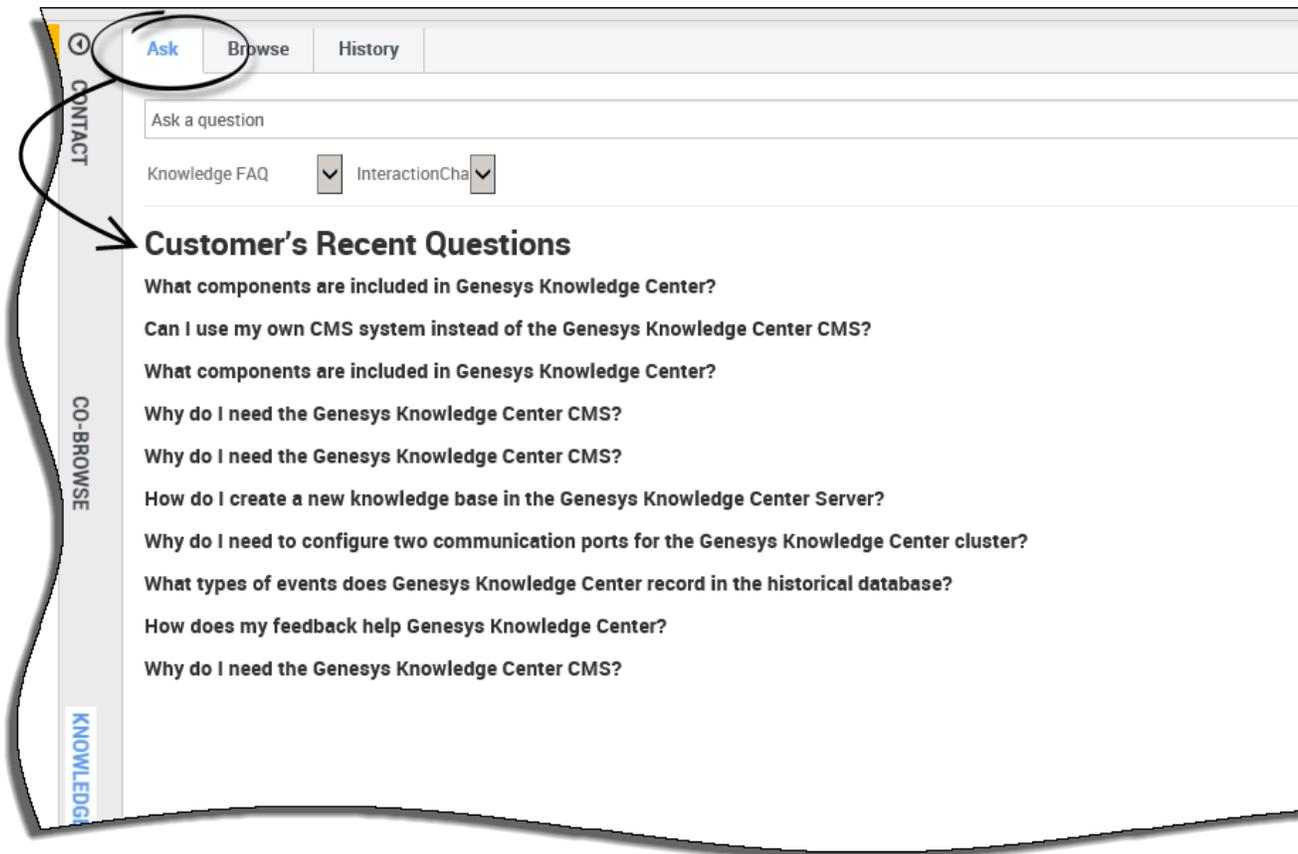
By default, the Knowledge Base is set to **All knowledge bases** allowing you to search through all live Knowledge Bases at the same time. Should you wish to search a single Knowledge Base however, clicking on the Knowledge Base menu allows you to choose a specific Knowledge Base from the list.

Selecting a Channel



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

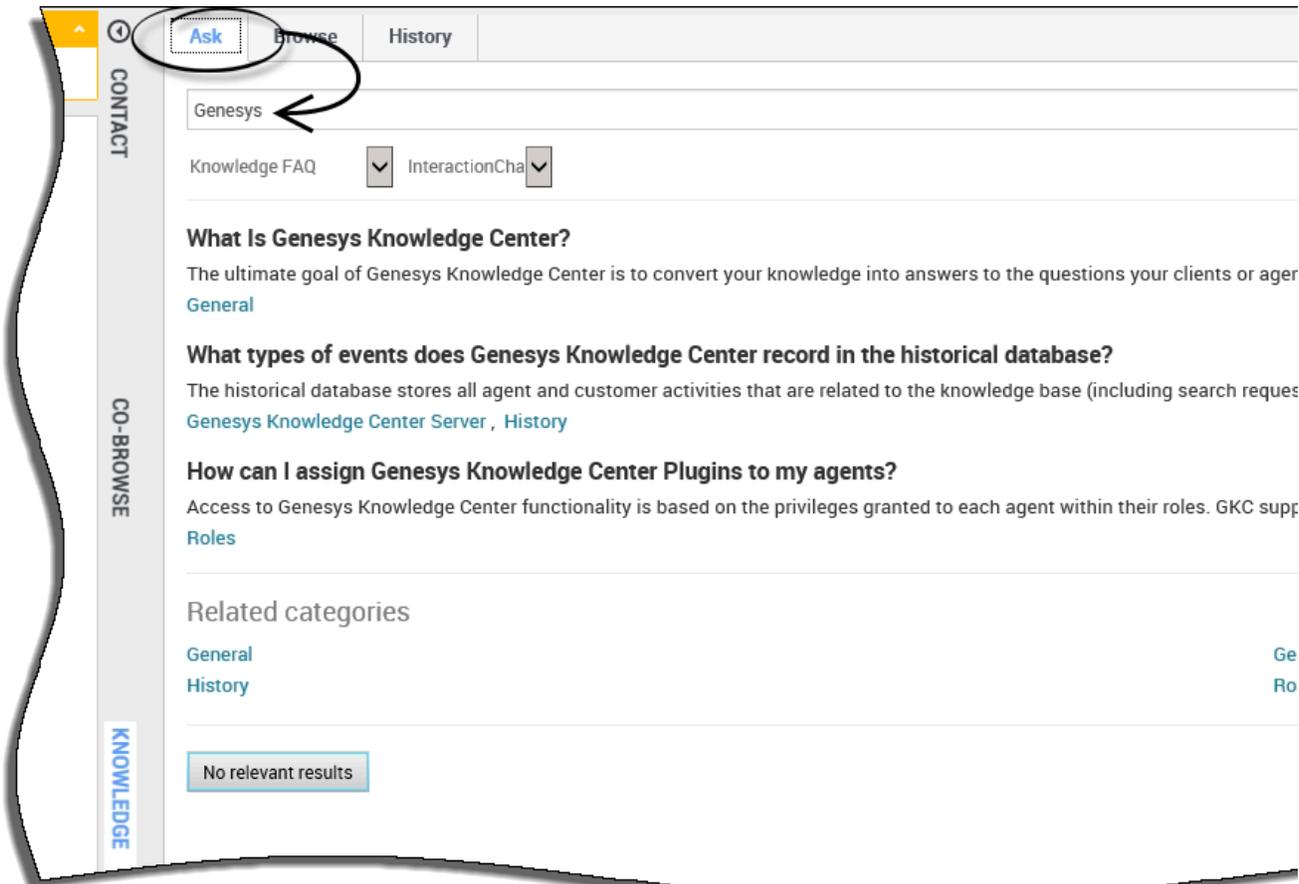
Viewing Recent Customer Questions



Use the following procedure to view any recent customer questions:

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

Searching for Answers in a Knowledge Base

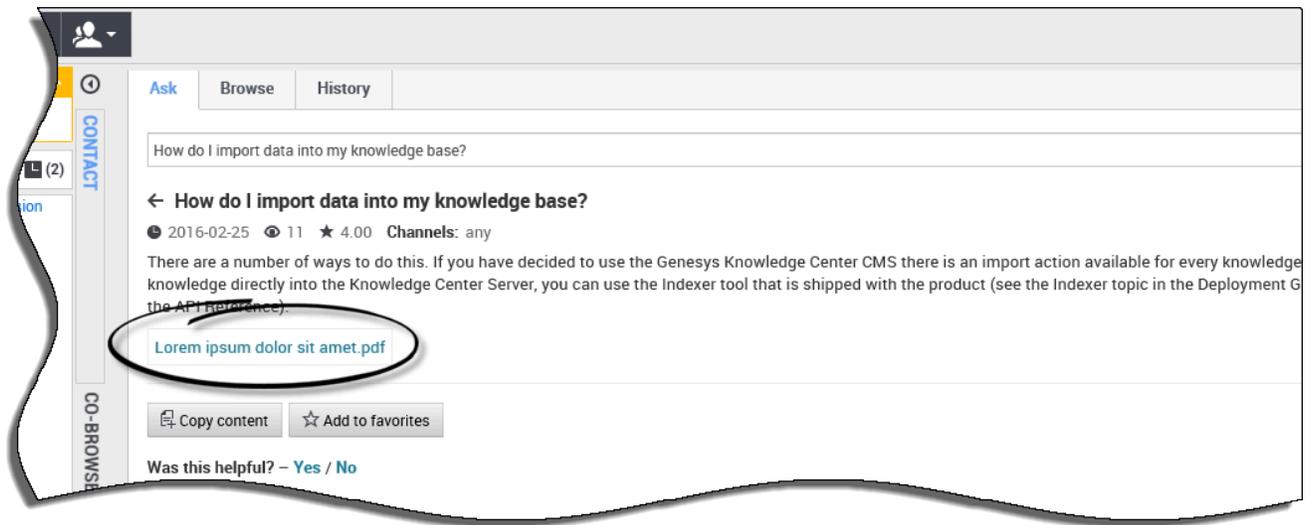


Use the following procedure to search for answers in a Knowledge Base.

Prerequisites:

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

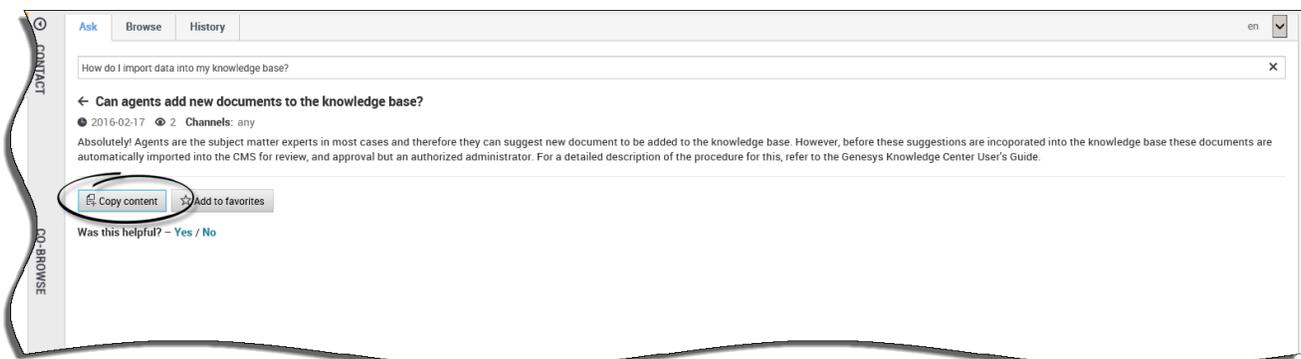
Viewing Attachments



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

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

Copying Answers



Use the following procedure to copy answers into your interactions:

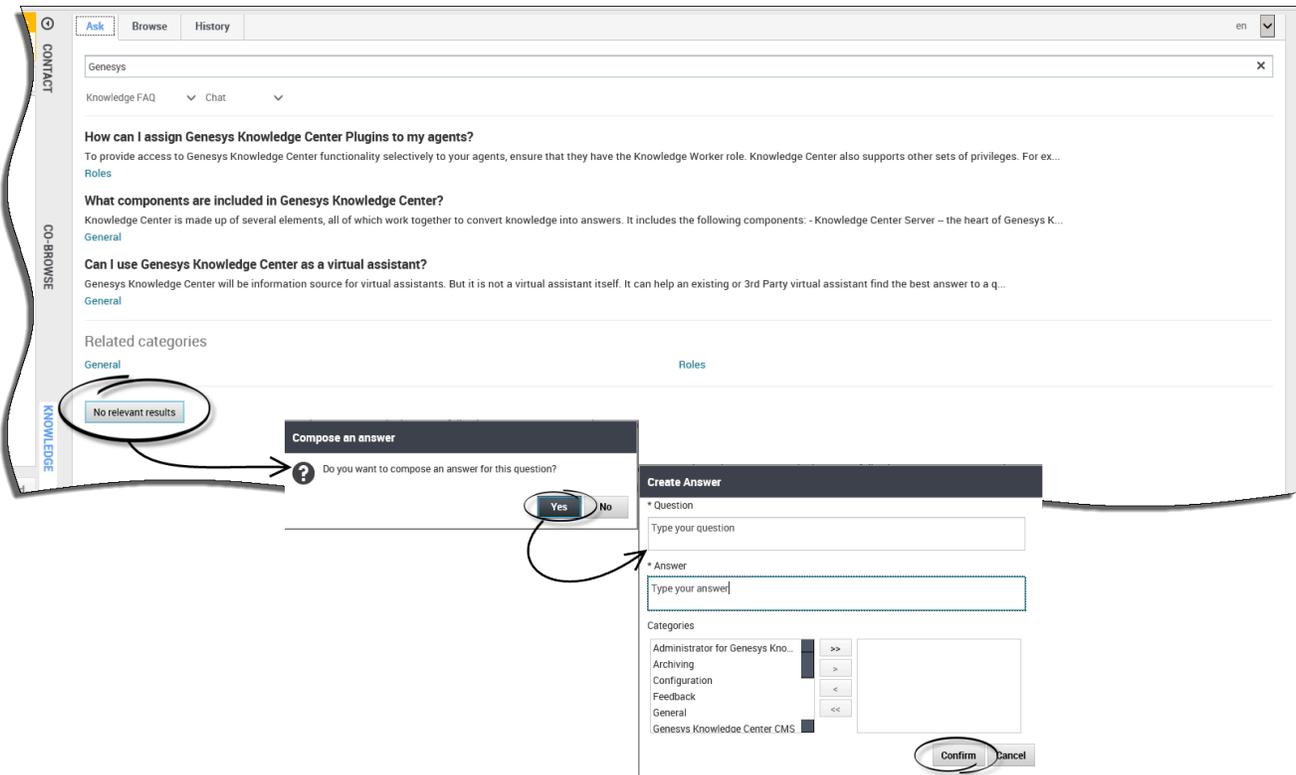
Prerequisites

- The incoming interaction has been accepted.

1. Click the **Knowledge** tab.

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

Suggesting an answer



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

Prerequisites

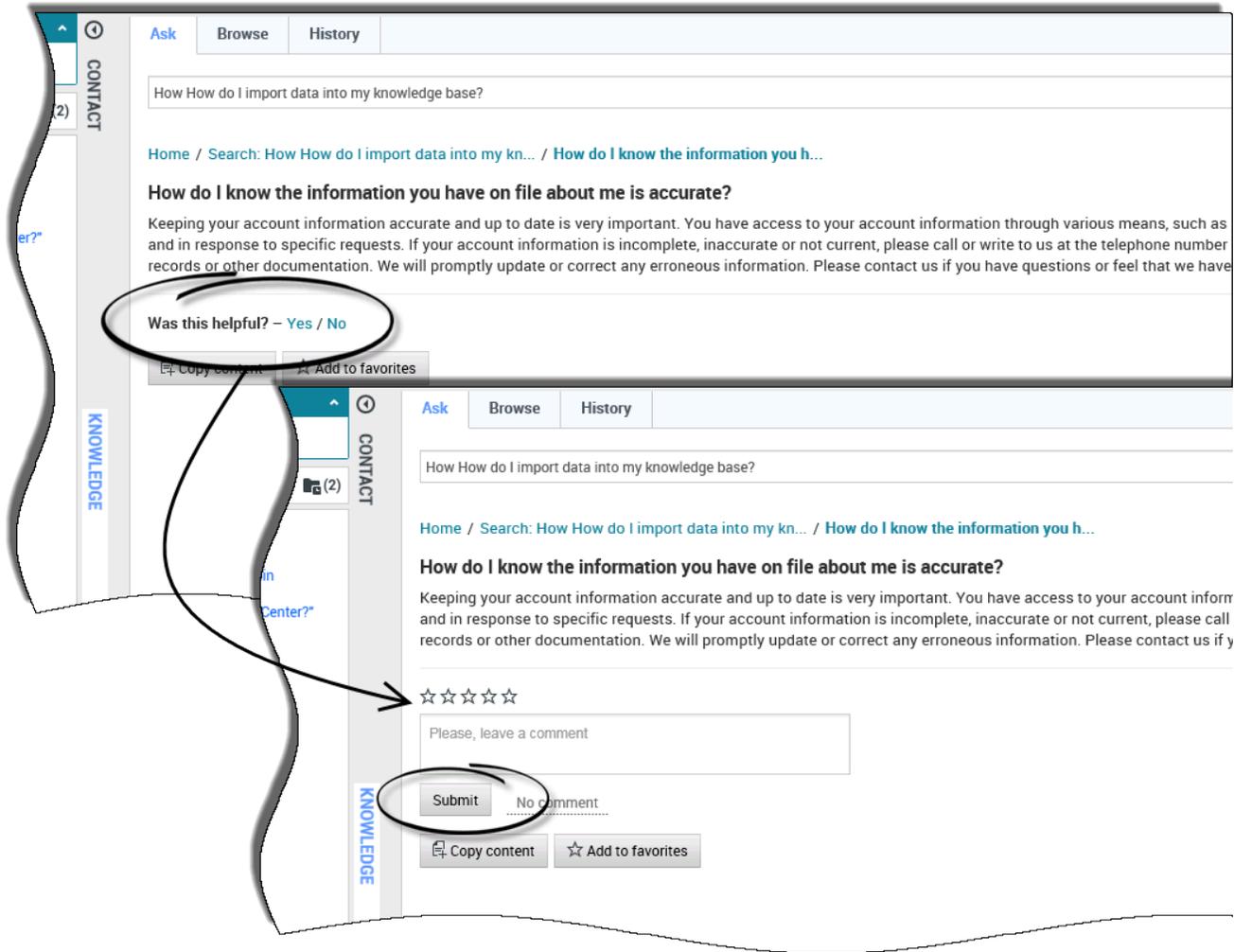
- The incoming interaction has been accepted.

Important

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

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

Providing Feedback



If the answer provided has been helpful, this is your chance to improve the knowledge base by providing feedback. Answering the question "Was this helpful" allows the system to better serve your future interactions by training the knowledge base to know which answers are the most suitable. Leaving a star-rating helps with overall reporting. Use the following procedure to provide feedback on a document in the Knowledge Base from the **Ask** tab:

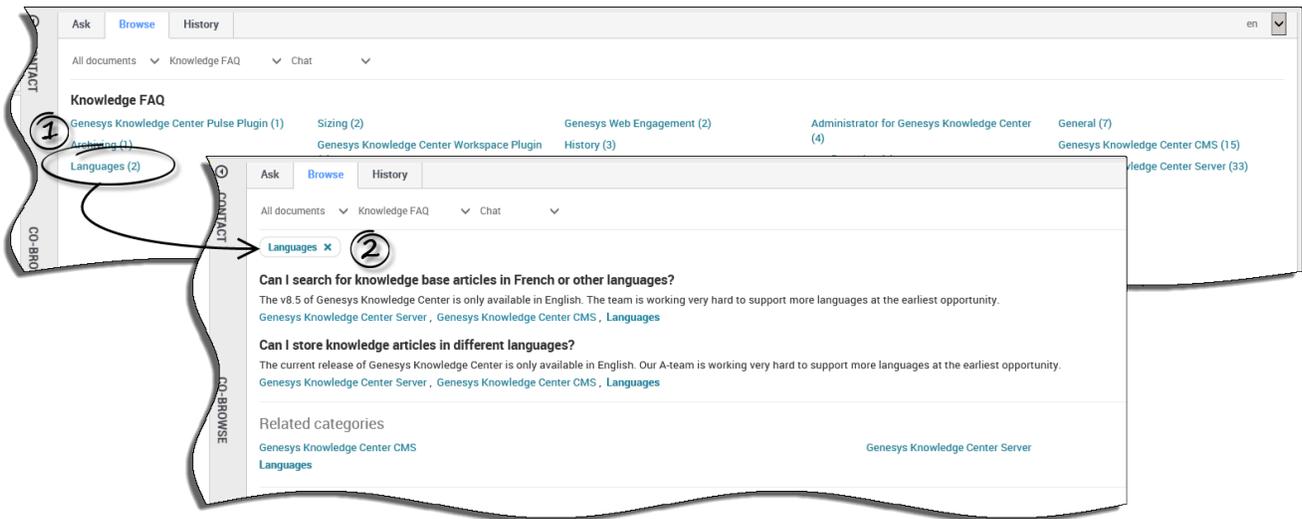
1. Answer **Yes** or **No** to the question, "Was this helpful?"
2. Give the current answer a star rating of your choice.
3. Type your feedback in the field provided and click **Submit**.

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

Browse tab:

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

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



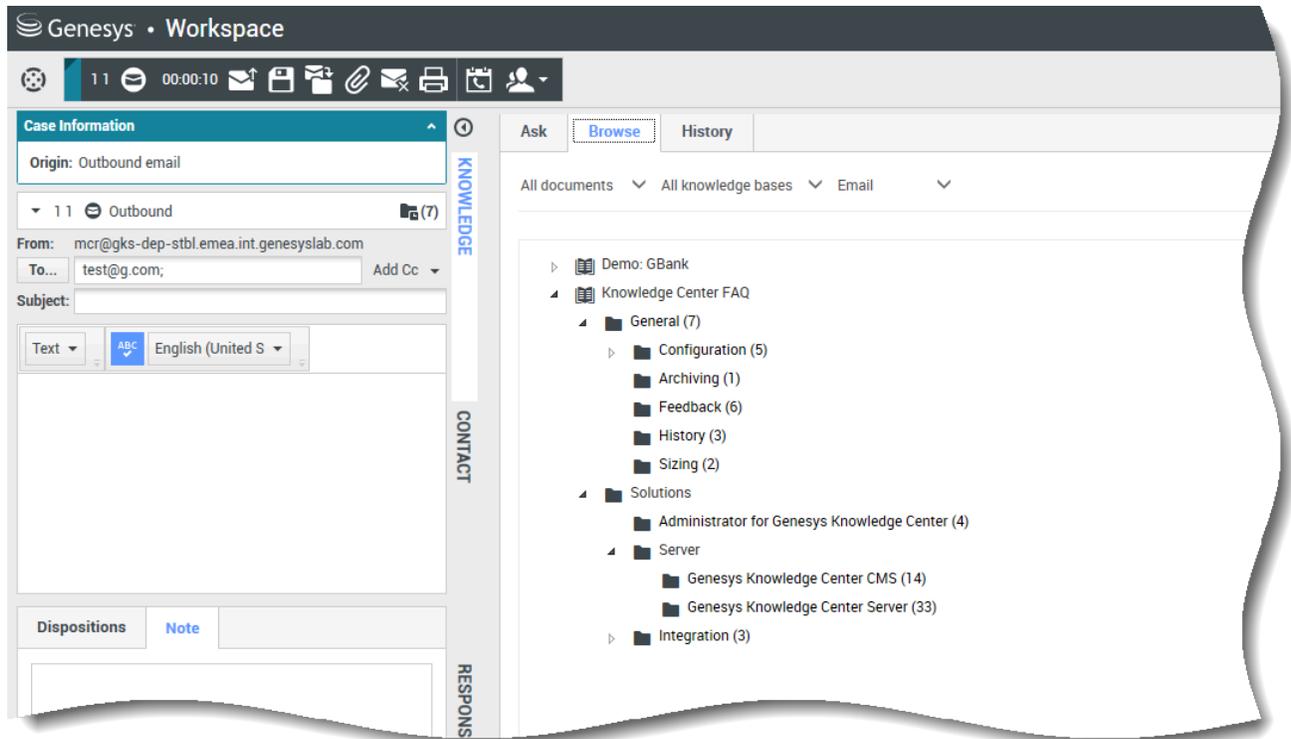
Use the following procedure to browse the Knowledge Base using Categories:

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

Important

For information on copying answers, please see [Copying Answers](#).

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



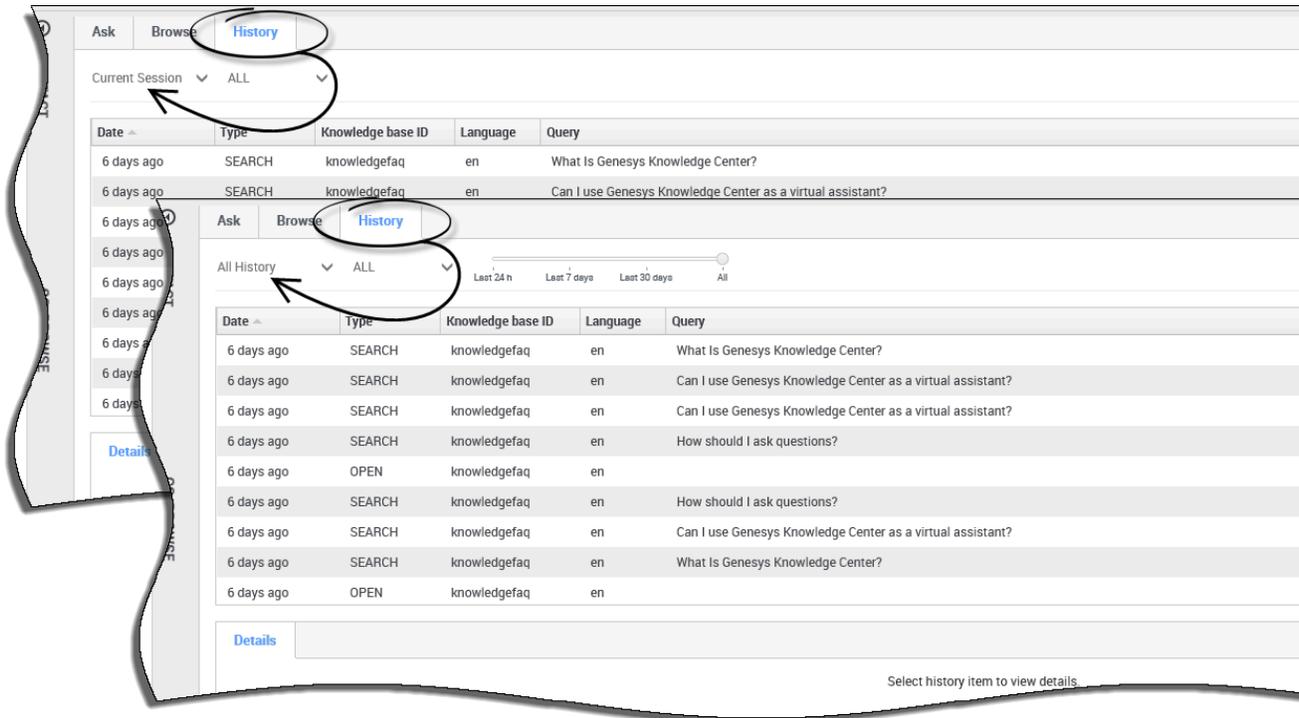
Use the following procedure to browse the Knowledge Base using Categories:

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

Important

For information on copying answers, please see [Copying Answers](#).

Browsing Customer Search History



Use the following procedure to review the customer search history:

Prerequisites:

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

ALL - shows all events (you can define a date range here, if needed)

SEARCH - shows the customer's search queries

NO ANSWER - shows queries when the customer indicated that there was no answer found

OPEN - shows documents that customer opened to view

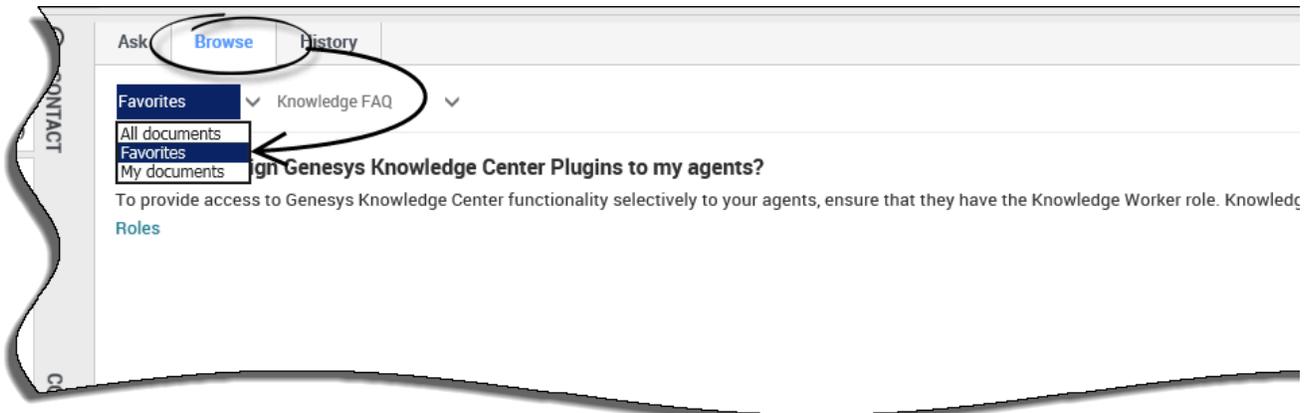
FEEDBACK - shows the customer's likes & dislikes

Important

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

information on the selected event.

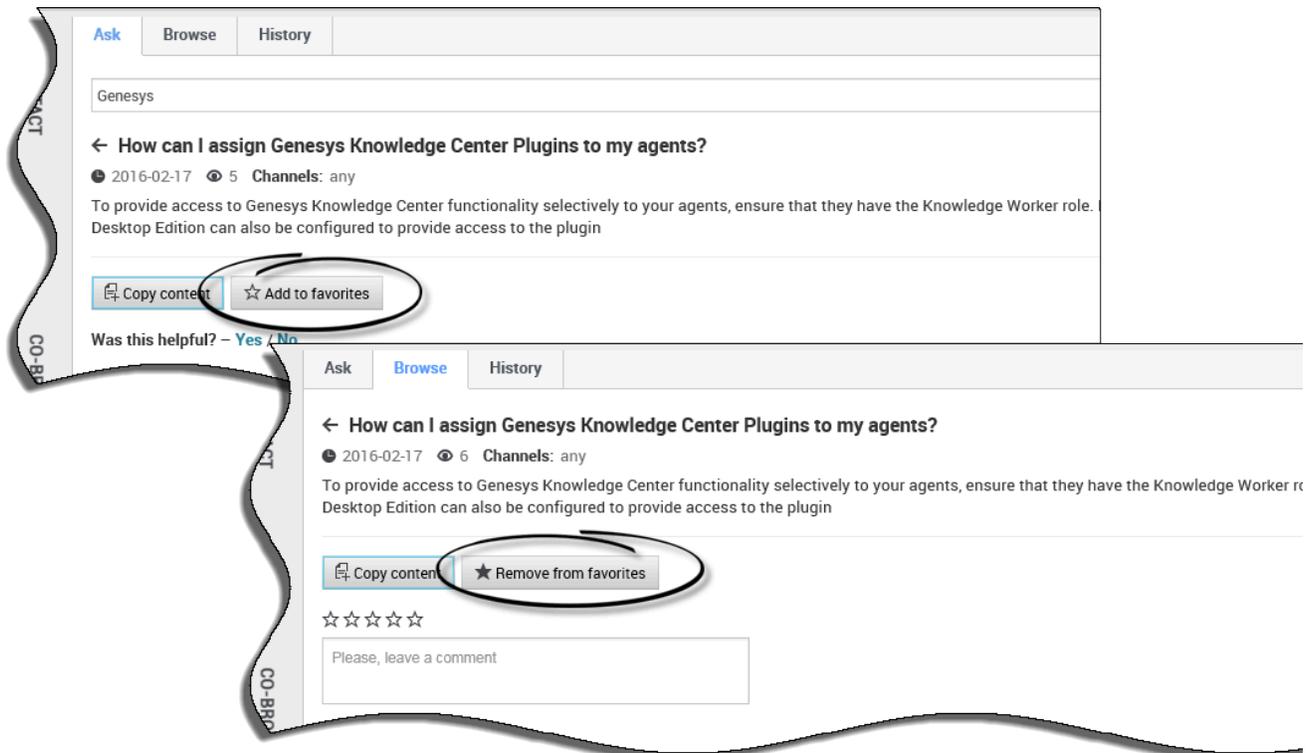
Browsing Favorites



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

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

Adding and removing Favorites

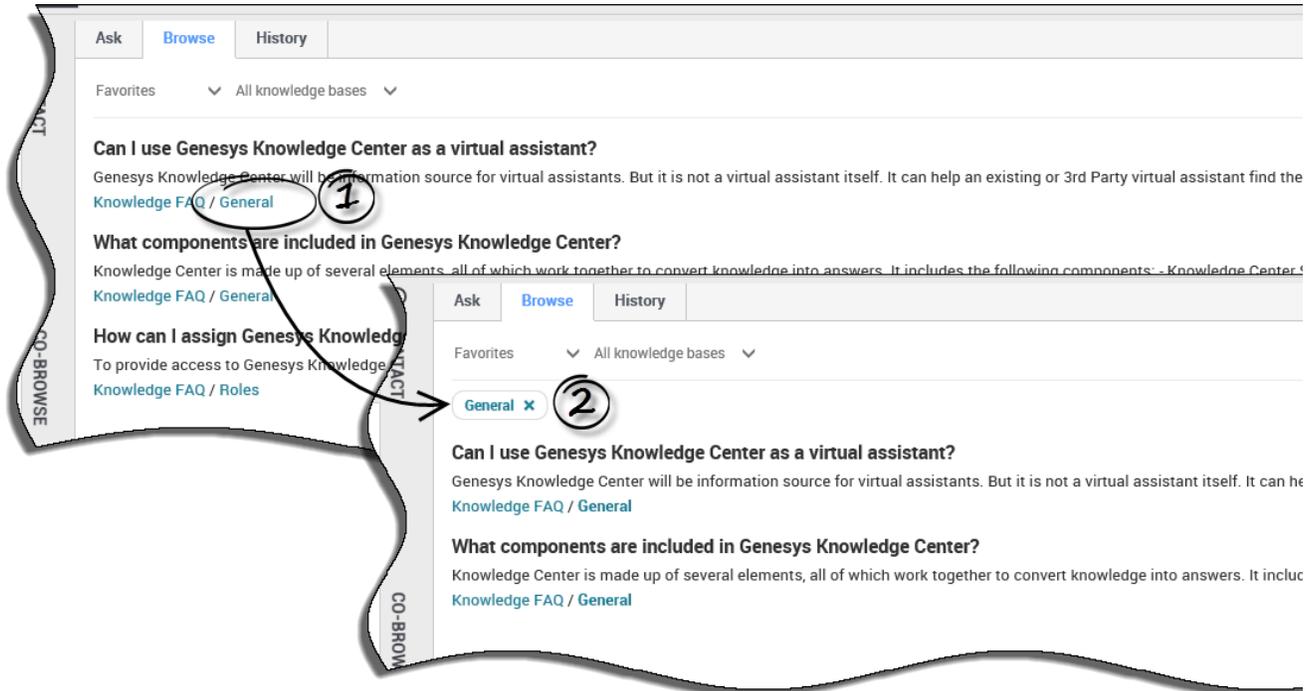


Adding and removing favorites is easy! With the click of a button, you have complete control over what documents are important to you.

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

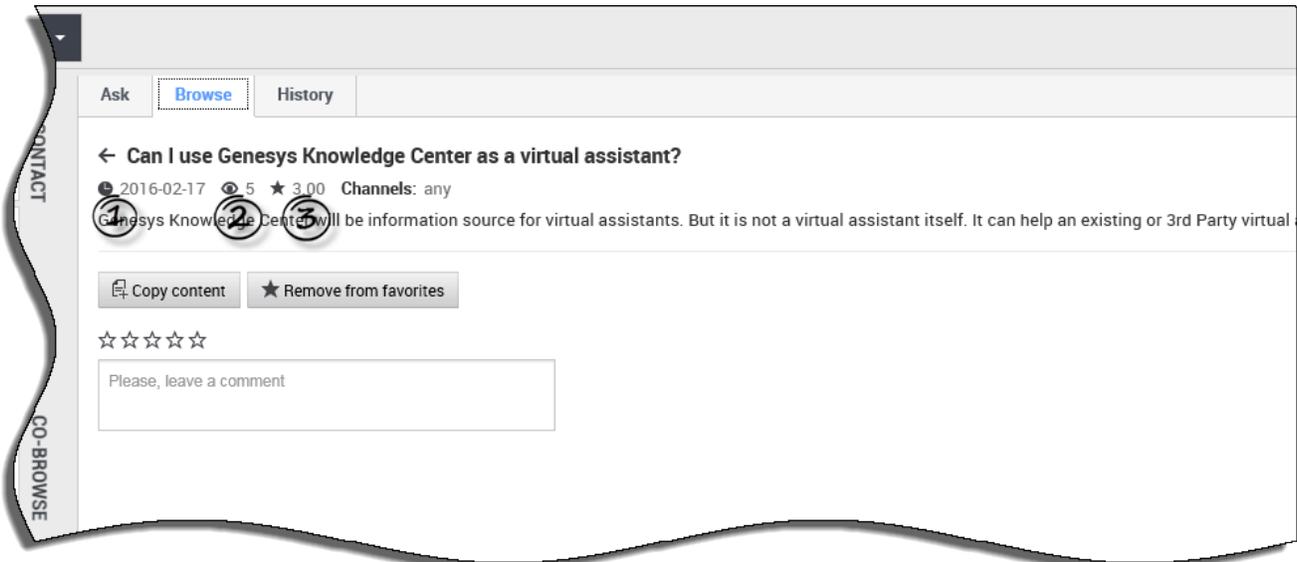
To remove a document from your favorites, click the **Browse** tab to navigate to your **Favorites** then click the question heading to expand the answer. From there you simply click **Remove from favorites** and the document is removed from your **Favorites**.

Browsing Favorites by category



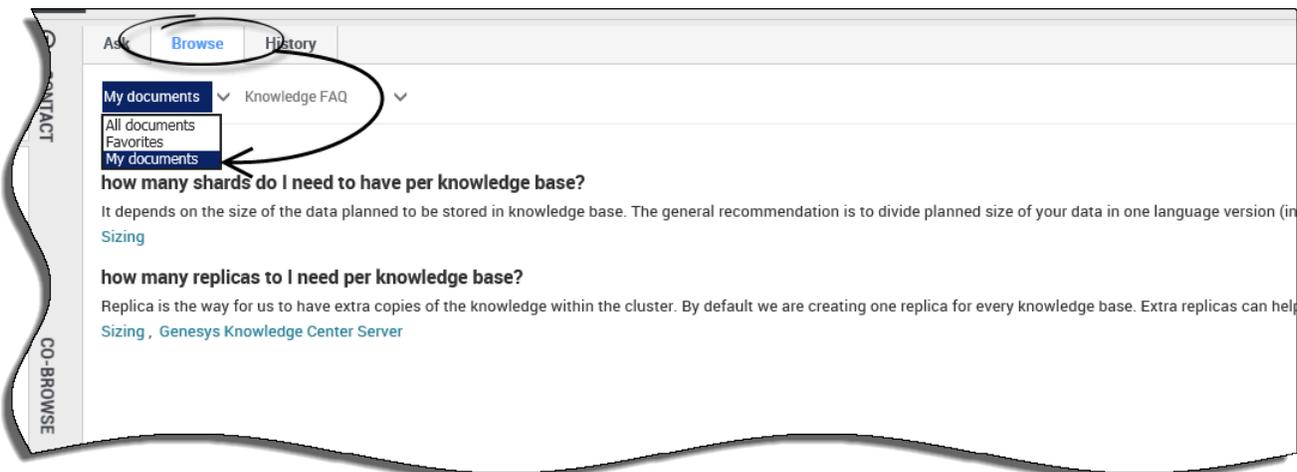
If your administrator has defined categories, you can use these to quickly jump to the right answer at the right time. Clicking on any of the categories helps narrow your search by only showing those documents that apply.

Reviewing document data



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

Browsing My Documents



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

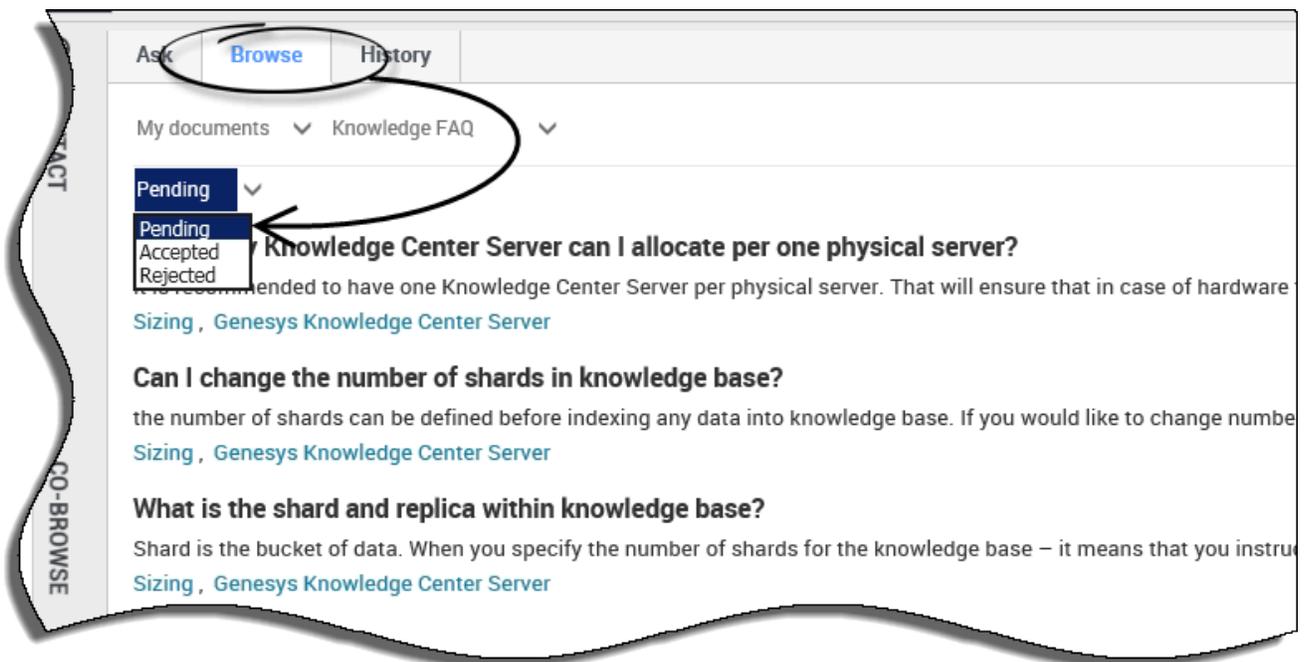
- Pending
- Accepted
- Rejected

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

Important

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

Pending status

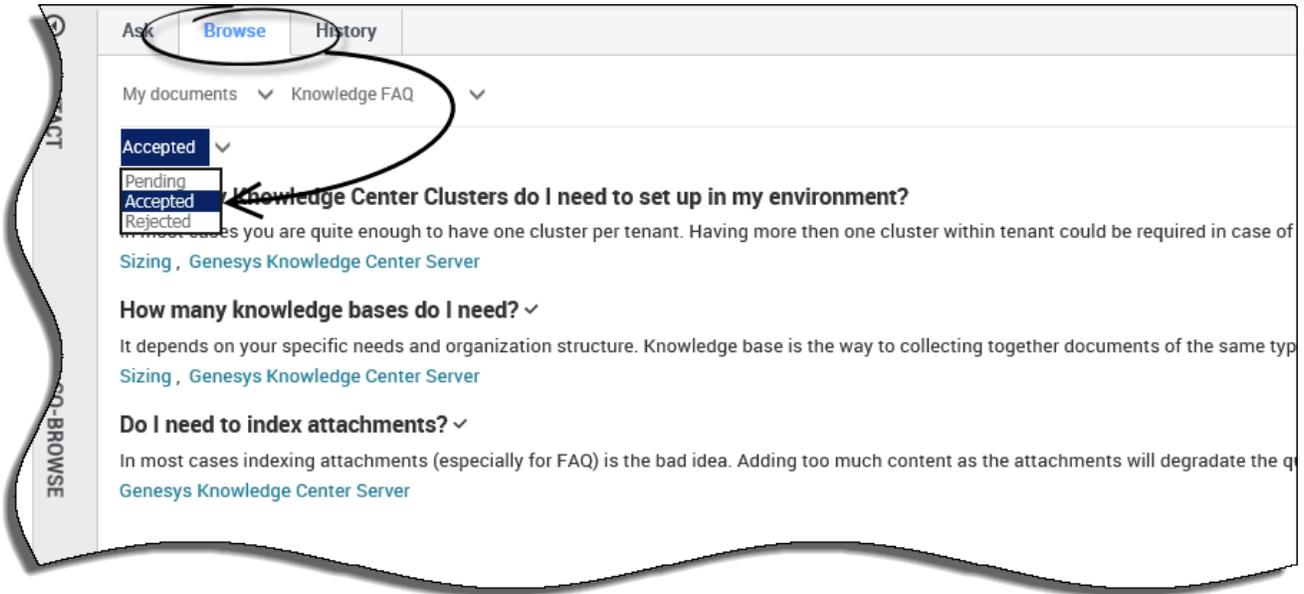


When you click **My Documents**, you're immediate view is of all your documents that are waiting for approval from your Knowledge Base Administrator. This is the default view.

From this view you can:

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

Accepted status

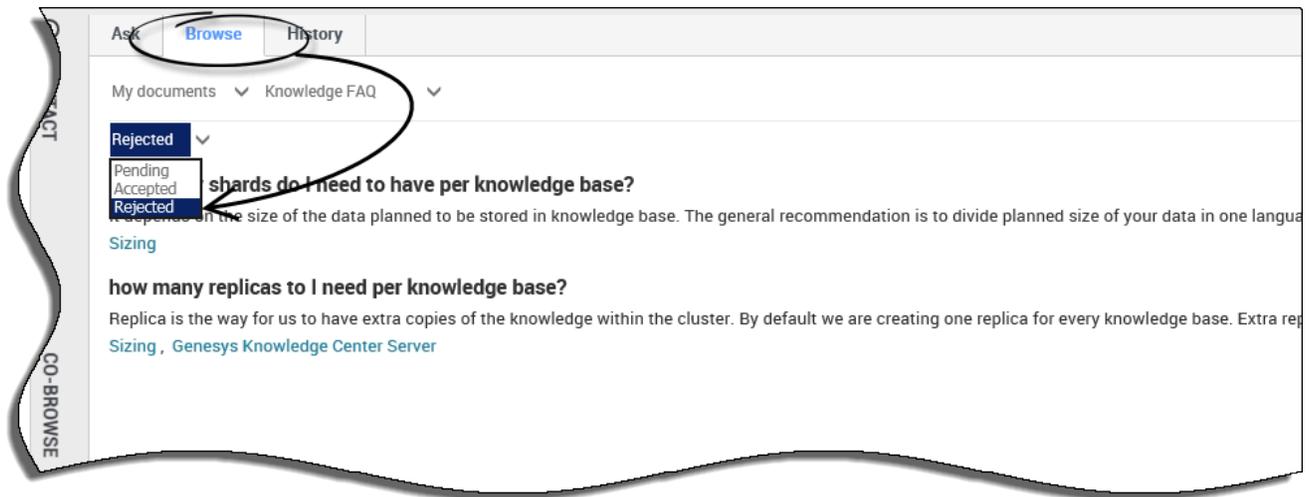


From the status menu, choose **Accepted** to see all the documents you've authored in the Knowledge Base that are approved by your Knowledge Base Administrator.

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

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

Rejected status



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

When viewing the Rejected status, you can also:

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

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)

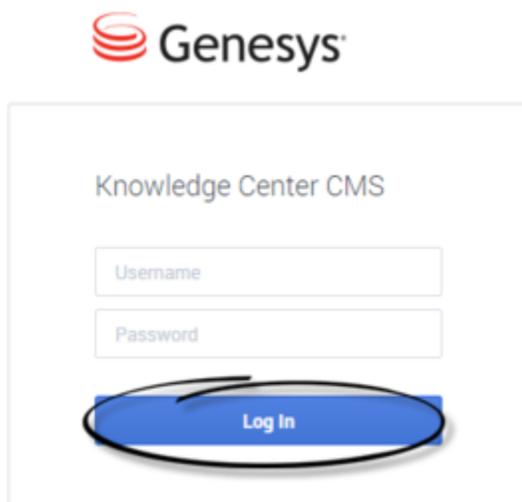
Logging Into the CMS

Prerequisites

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

Start

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

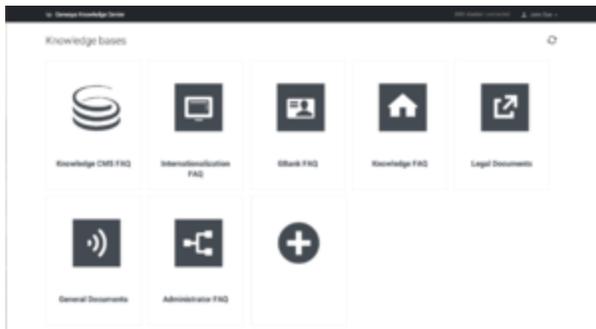


End

Inside of the CMS

Homepage

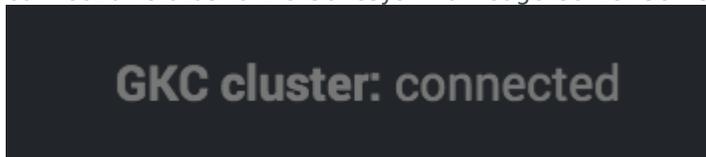
When you log into the CMS you will end up on the home page:



The homepage contains following areas:

1. Top menu:

- a. connection status to the Genesys Knowledge Center Server



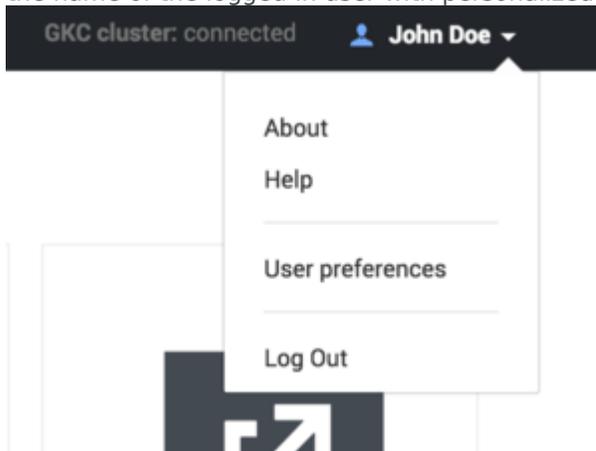
Important

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

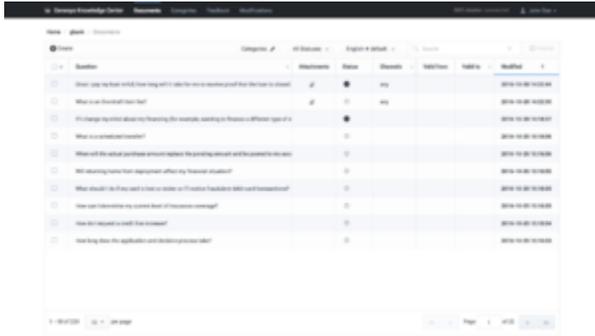


3. The main area contains the list of the knowledge bases you have in your CMS and provides the ability to
-

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:



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

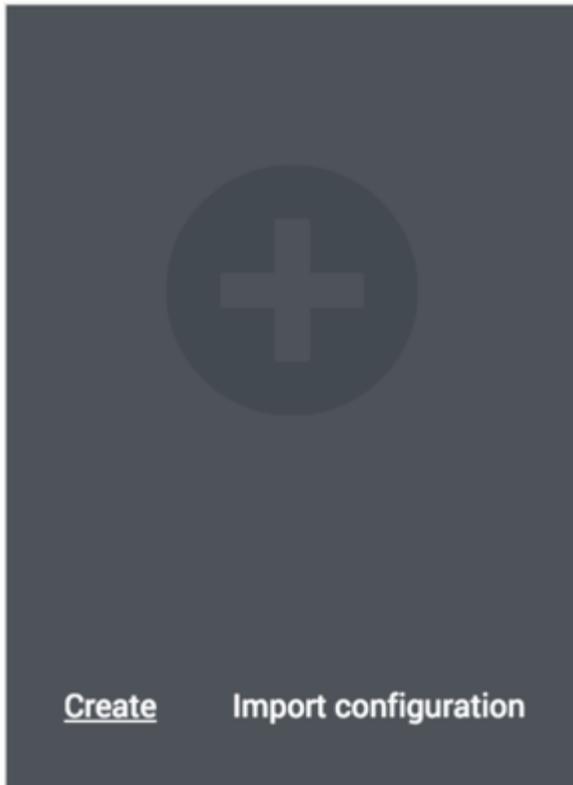
- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the + sign on the main page.



2. Click "Create" link



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

On the **General** tab:

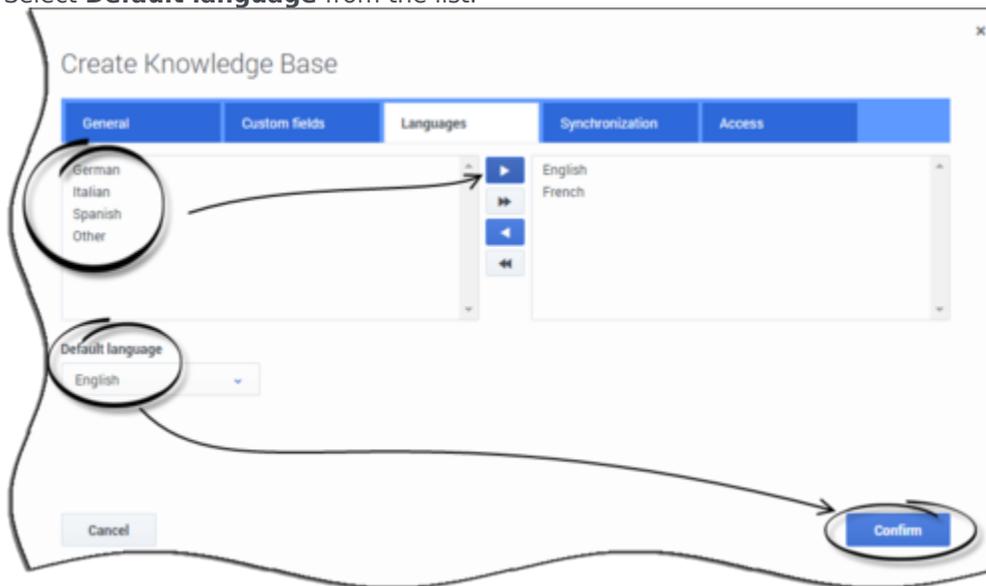
- Enter the unique knowledge base ID (the ID should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters).
- Enter knowledge base name (maximum length of 50 characters).
- Enter the Document Type (FAQ or Article).
- (Optional) You can change the default icon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

The screenshot shows the 'Create Knowledge Base' dialog box with the 'General' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: General, Custom fields, Languages, Channels, Synchronization, and Access. The 'General' tab contains the following fields and controls:

- * Knowledge Base ID: A text input field.
- * Knowledge Base Name: A text input field.
- Knowledge Base Description: A text area.
- * Document type: A dropdown menu with 'FAQ' selected.
- Knowledge Base Icon: A dropdown menu with 'Genesys' selected, accompanied by a stack of coins icon.
- Buttons: 'Cancel' and 'Confirm'.

4. To add supported languages to Knowledge Base:

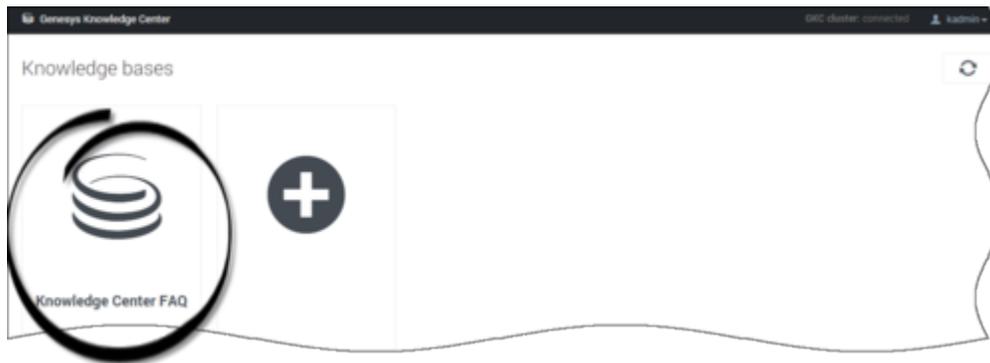
- Click the **Languages** tab.
- Move appropriate languages to the **Selected languages** list.
- Select **Default language** from the list.



Important

The first language added to the knowledge base will become the default language for this knowledge base. It cannot be removed or changed. More information regarding usage of different languages in the knowledge bases can be found in [Understanding Language Principles](#).

5. Your knowledge base has been created.



End

Deleting a Knowledge Base

Important

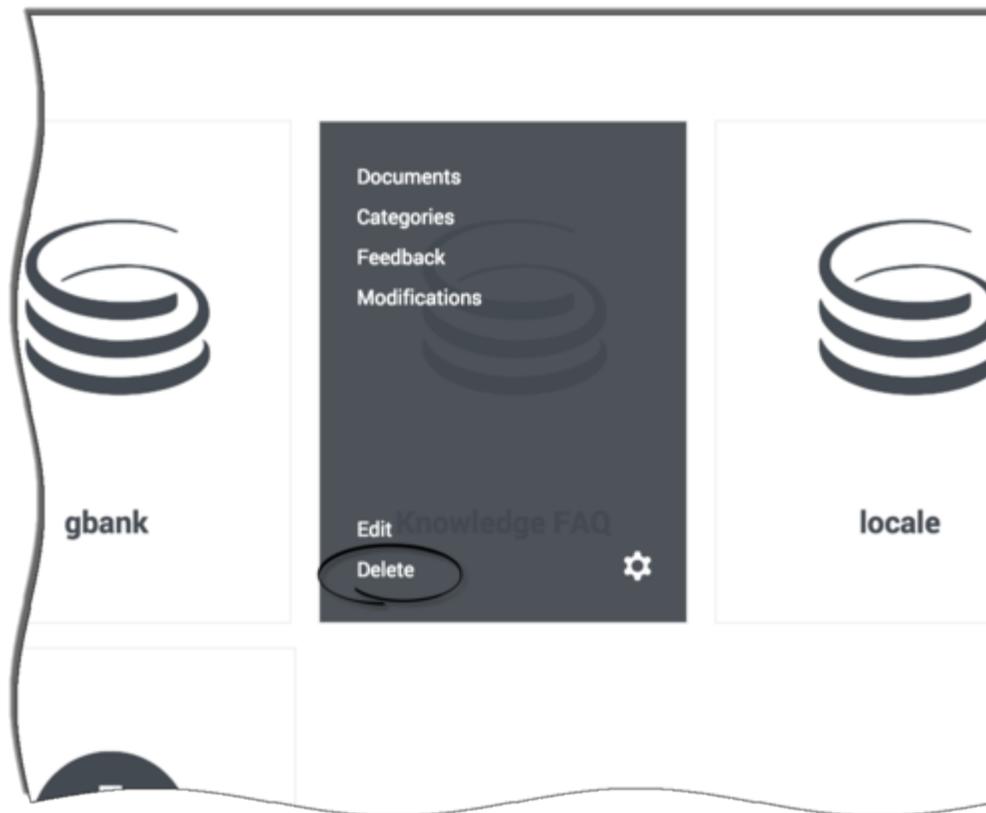
Deleting a Knowledge Base will delete all of the content in that Knowledge Base.

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

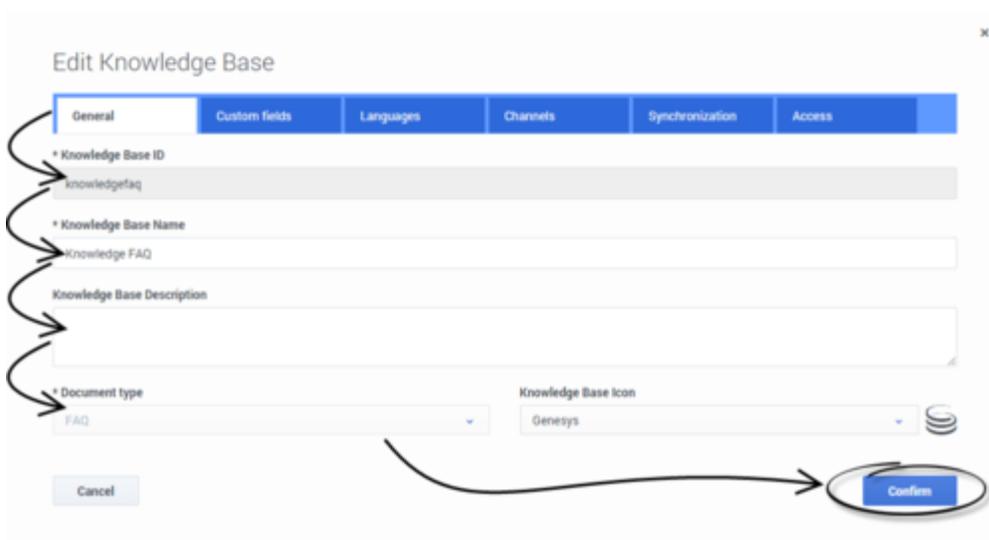
Prerequisites

- 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.

Using the CMS (8.5.302.xx and earlier)



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

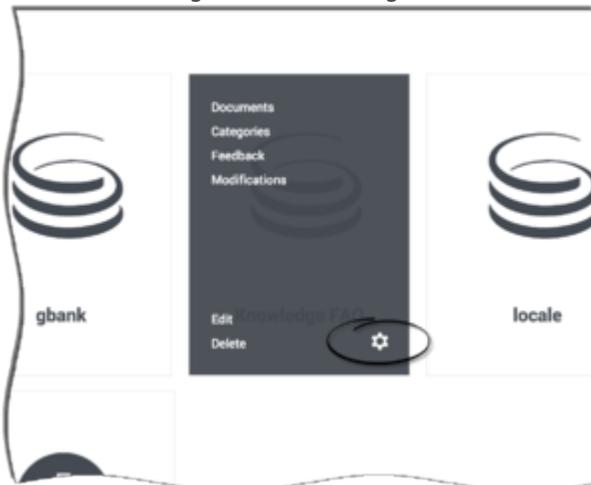
End

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

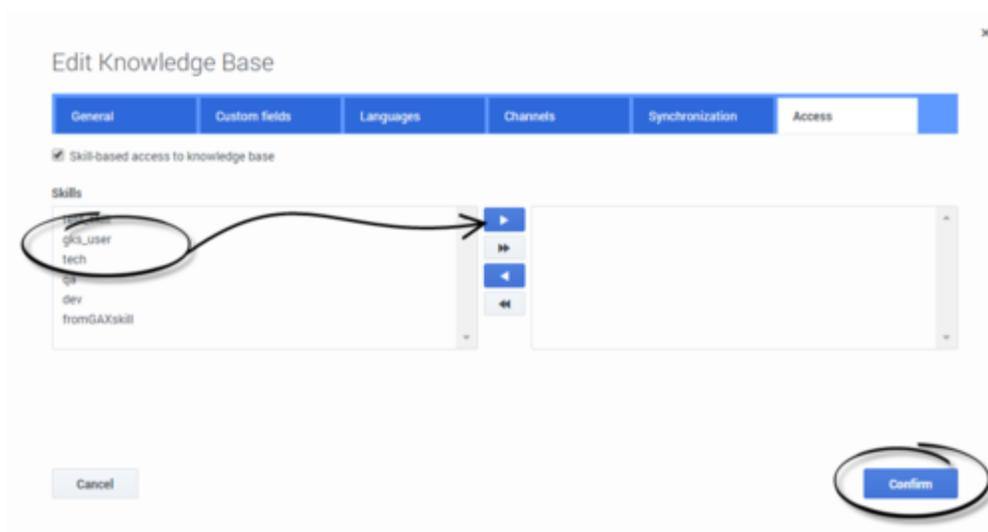
End

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.



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

End

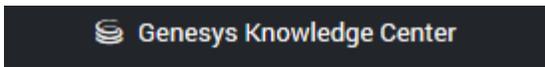
Importing Initial Documents

Prerequisites

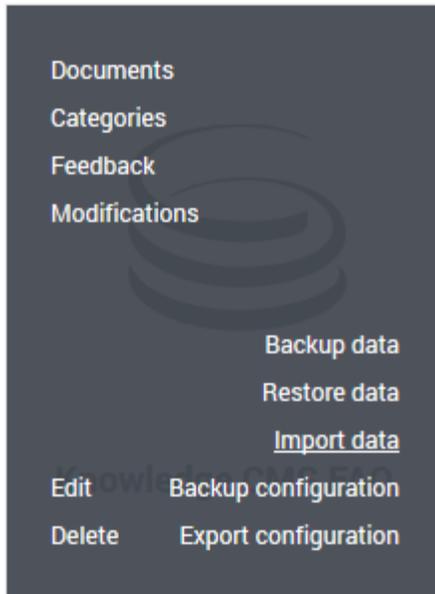
- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Document.Author** or **Knowledge.CMS.Category.Author** privileges have been assigned to the user.
- Files being targeted for import are available in the appropriate format. For more information, please see [Importing Data into the Knowledge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

Start

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



Knowledge bases



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



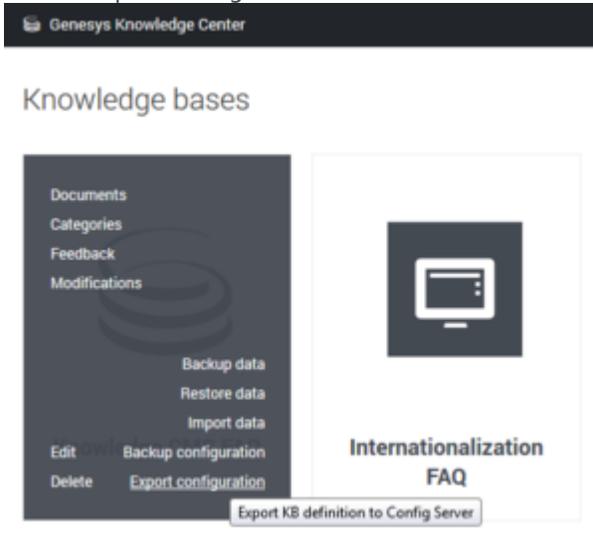
5. Click **Import**; your data is imported into the CMS.

End

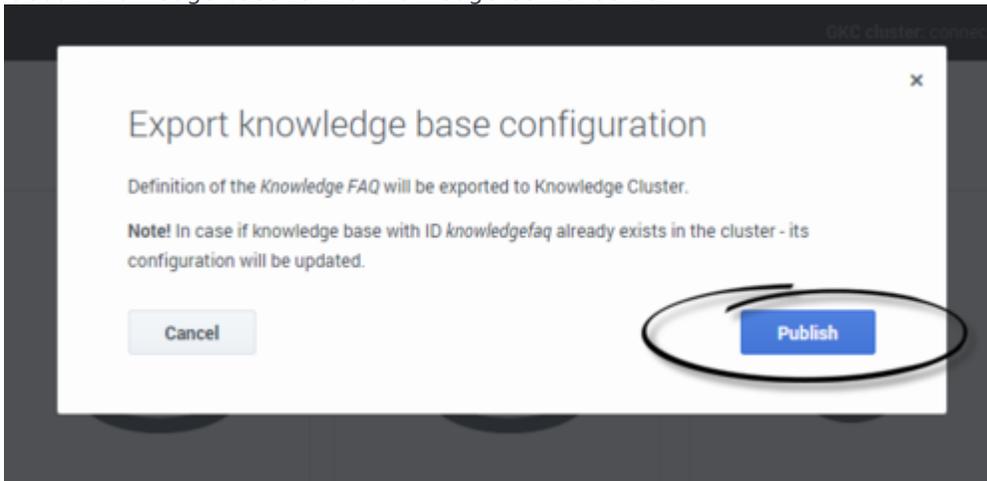
Notify Knowledge Center Server about new Knowledge Base

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



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.



5. Click the **Publish** button.

Important

The content of the knowledge base will not be sent to the knowledge center server at this step. The CMS will only notify Knowledge Center Server about the existence of the knowledge, its name, id, supported languages, custom attributes and access policy. You can view and edit sent information in the [Administrator Plugin](#).

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

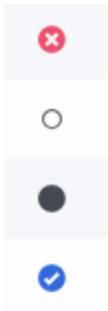
- First version of the category or document must be created in the default language of the knowledge base.
- As soon as a document or a category is created in the default language they can be translated to the other languages or their regional versions.
- Regional version of the document can be created 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 bottom: rejected, draft, in review, approved):

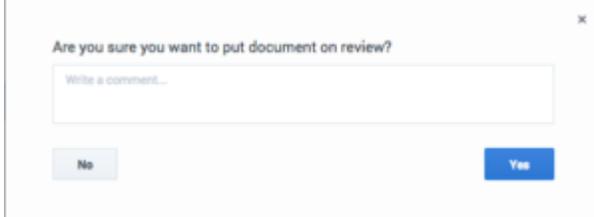


Let's look at an example flow:

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



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.



Important

Comments are visible in the document history only. Comments are not exported into the Genesys Knowledge Center Server and are not visible for agents and customers using the 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:



- b. You can change content of the category/document and save it and this 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.



Important

If you edit and save the approved category/document, its status will change to "Draft" and you need to start the approval flow from the beginning for the new changes while agents and customers can still use the latest approved version of the category/document.

- 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:

Using the CMS (8.5.302.xx and earlier)



- 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

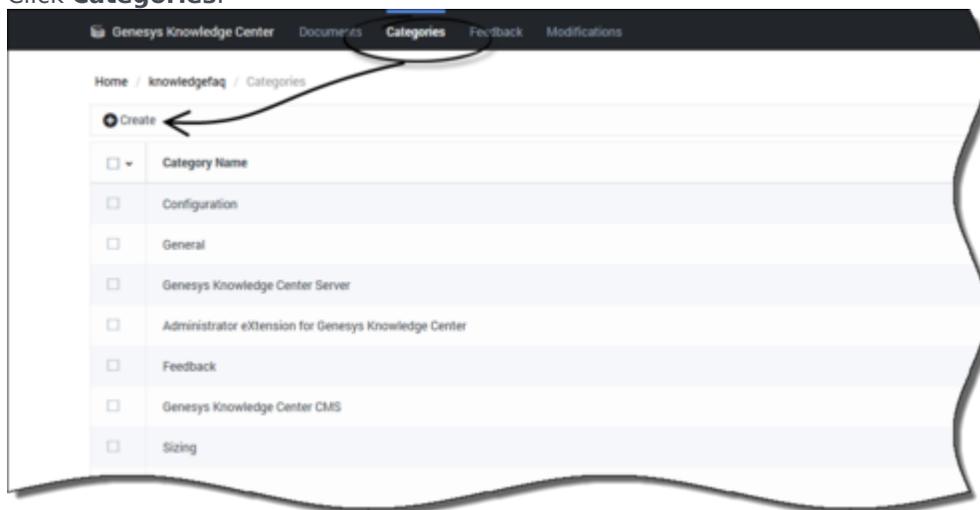
Creating a New Category

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.

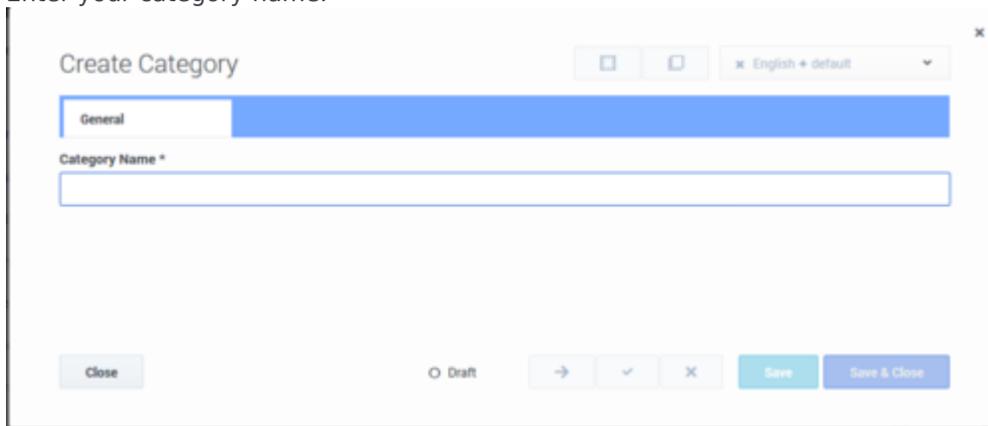
Start

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



3. Press the **Create** button.

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



The screenshot shows a 'Create Category' dialog box. At the top, there's a title bar with the text 'Create Category' and a close button (X). Below the title bar, there's a tab labeled 'General'. Underneath the tab, there's a text input field labeled 'Category Name *'. At the bottom of the dialog, there are several buttons: 'Close', 'Draft', a right arrow button, a checkmark button, an X button, 'Save', and 'Save & Close'.

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

End

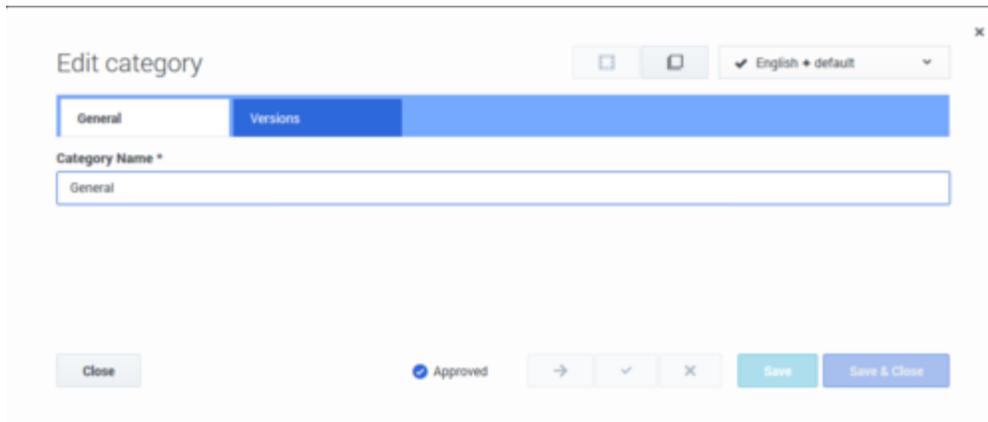
Viewing or Modifying a Category

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.

Start

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.



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**.

End

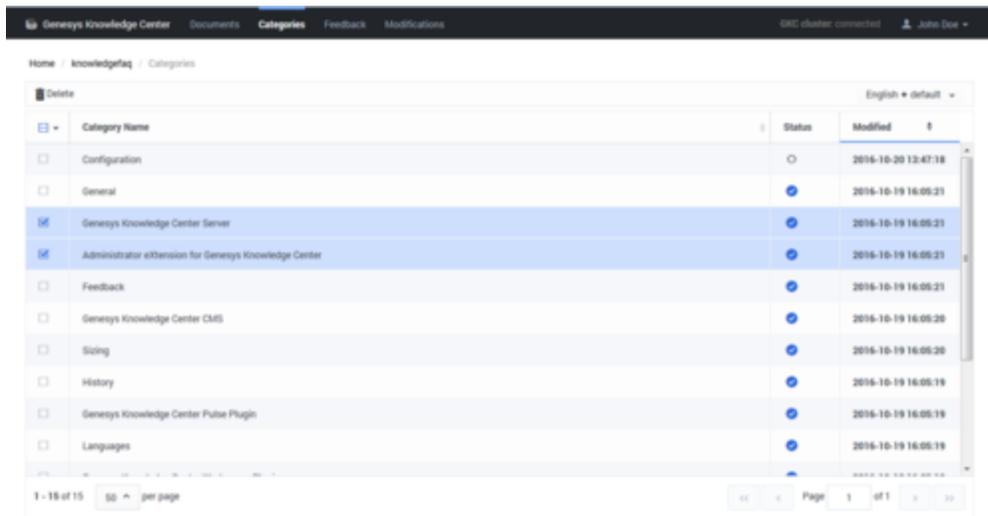
Deleting Categories

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.

Start

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.



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

End

Working with Documents

Creating a Document

Prerequisites

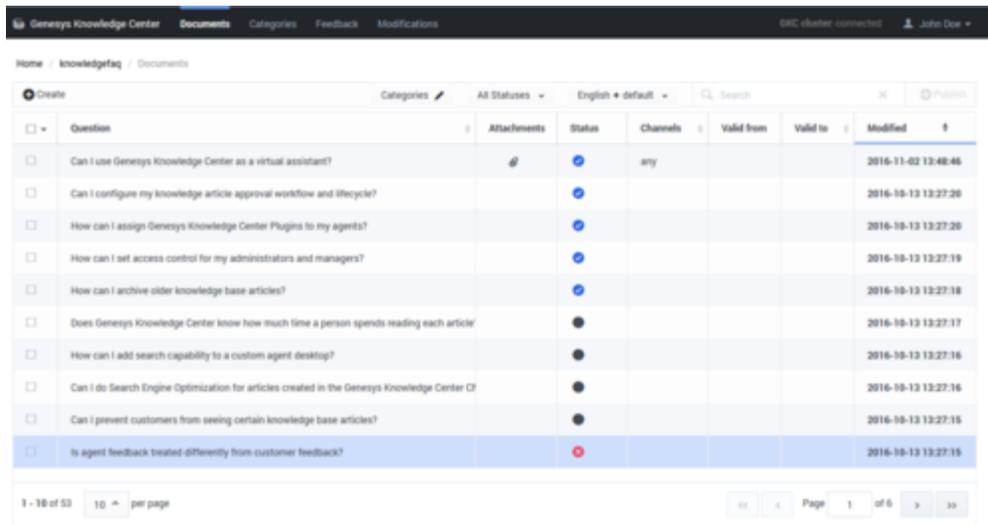
- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Important

The maximum size of attachments is 20MB.

Start

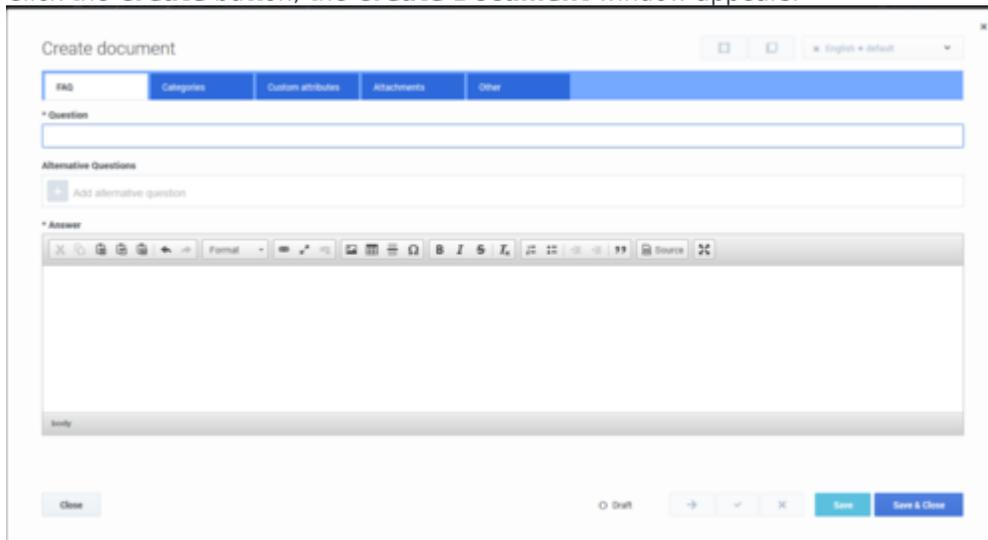
1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.



The screenshot shows the Genesys Knowledge Center interface. At the top, there are navigation tabs: Home, knowledgefaq, Documents, Categories, Feedback, and Modifications. Below this is a header with 'Create', 'Categories', 'All Statuses', 'English + default', and a search bar. The main content is a table with columns: Question, Attachments, Status, Channels, Valid from, Valid to, and Modified. The table lists several FAQ items, with the last one highlighted in blue. At the bottom, there is a pagination control showing '1 - 10 of 53' and 'Page 1 of 6'.

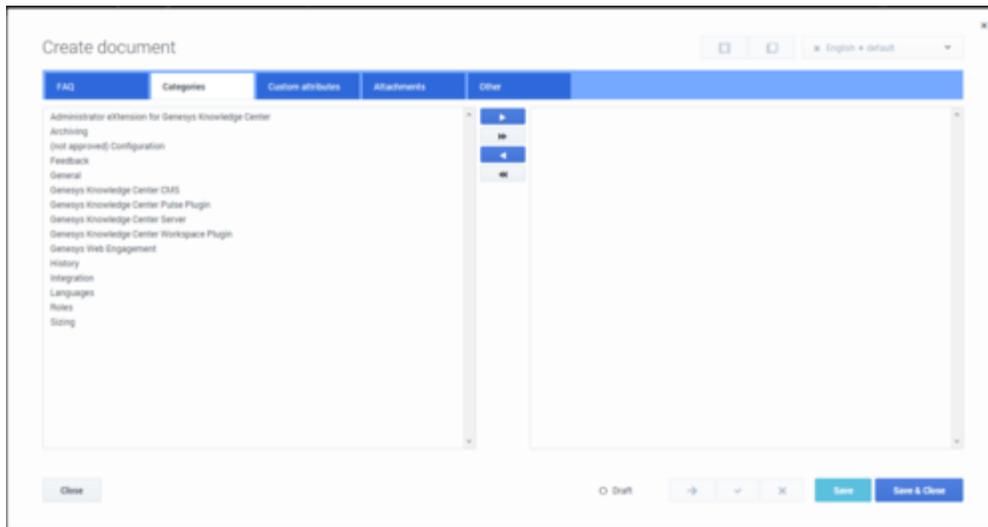
Question	Attachments	Status	Channels	Valid from	Valid to	Modified
Can I use Genesys Knowledge Center as a virtual assistant?		●	any			2016-11-02 13:48:46
Can I configure my knowledge article approval workflow and lifecycle?		●				2016-10-13 13:27:20
How can I assign Genesys Knowledge Center Plugins to my agents?		●				2016-10-13 13:27:20
How can I set access control for my administrators and managers?		●				2016-10-13 13:27:19
How can I archive older knowledge base articles?		●				2016-10-13 13:27:18
Does Genesys Knowledge Center know how much time a person spends reading each article?		●				2016-10-13 13:27:17
How can I add search capability to a custom agent desktop?		●				2016-10-13 13:27:16
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI?		●				2016-10-13 13:27:16
Can I prevent customers from seeing certain knowledge base articles?		●				2016-10-13 13:27:15
Is agent feedback treated differently from customer feedback?		●				2016-10-13 13:27:15

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

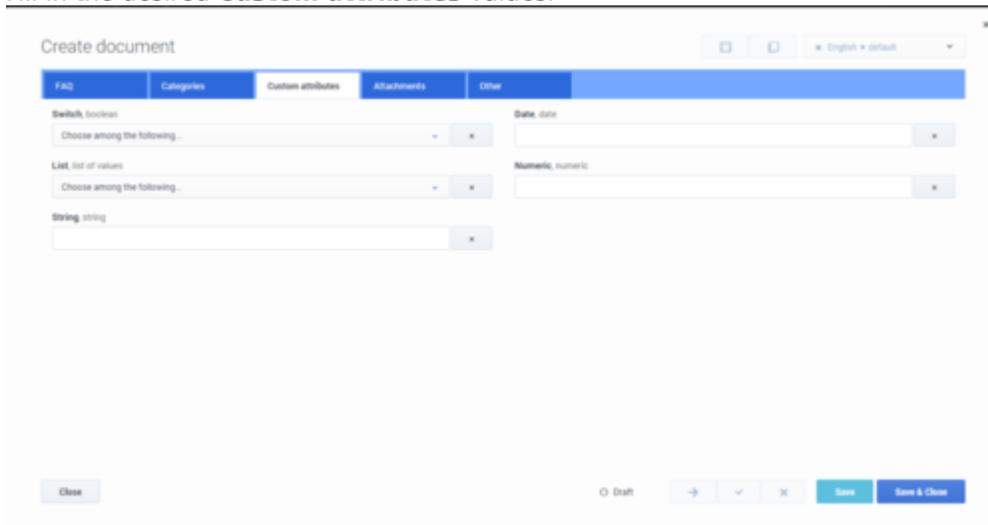


The screenshot shows the 'Create document' window. It has a title bar with 'Create document' and a close button. Below the title bar are tabs: 'FAQ', 'Categories', 'Custom attributes', 'Attachments', and 'Other'. The 'FAQ' tab is selected. The form has three main sections: 'Question' with a text input field, 'Alternative Questions' with a '+ Add alternative question' button and a text input field, and 'Answer' with a rich text editor. The rich text editor has a toolbar with various formatting options like bold, italic, underline, link, and image. At the bottom of the window, there are buttons for 'Close', 'Draft', and 'Save & Close'.

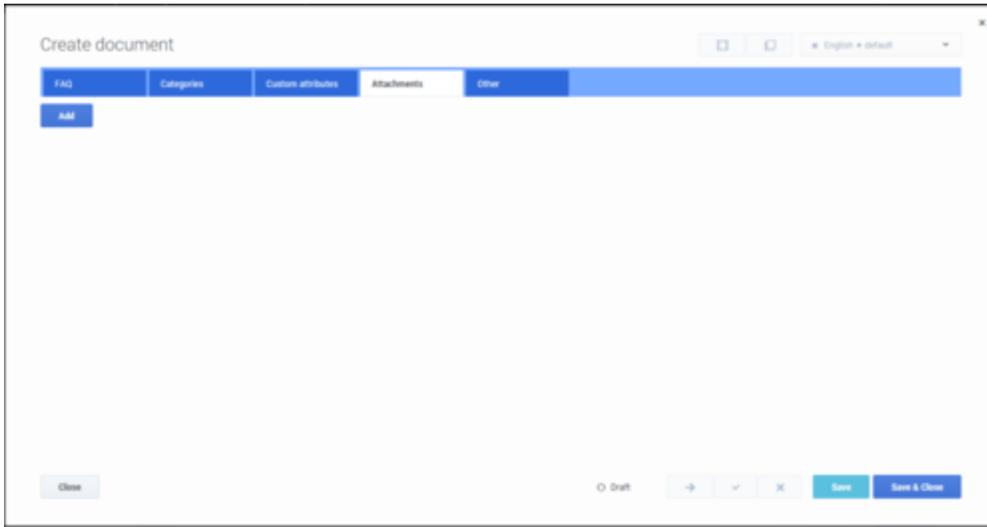
4. Fill in the **FAQ** tab by adding **Question** and **Answer** (required) or **Article** tab by adding **Title**, **Summary** and **Description** (required). Add alternative wordings of the question or title (by pressing the + sign in the **Alternative questions** field). Links and images are permitted 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.



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



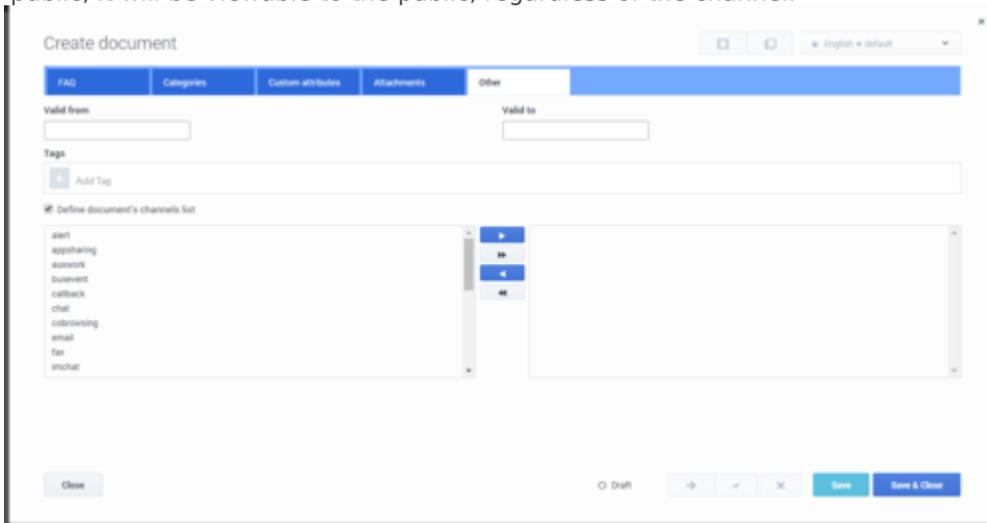
7. Add **Attachments** by pressing the **Add** button and then the **Upload** button. To remove attachments, press the **Remove** button.



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.



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

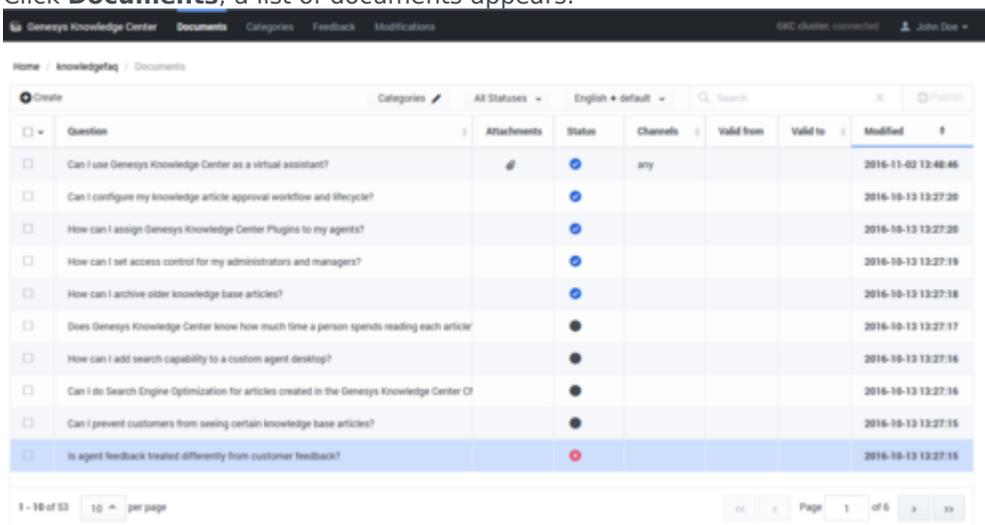
Viewing or Modifying a Document

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.

Start

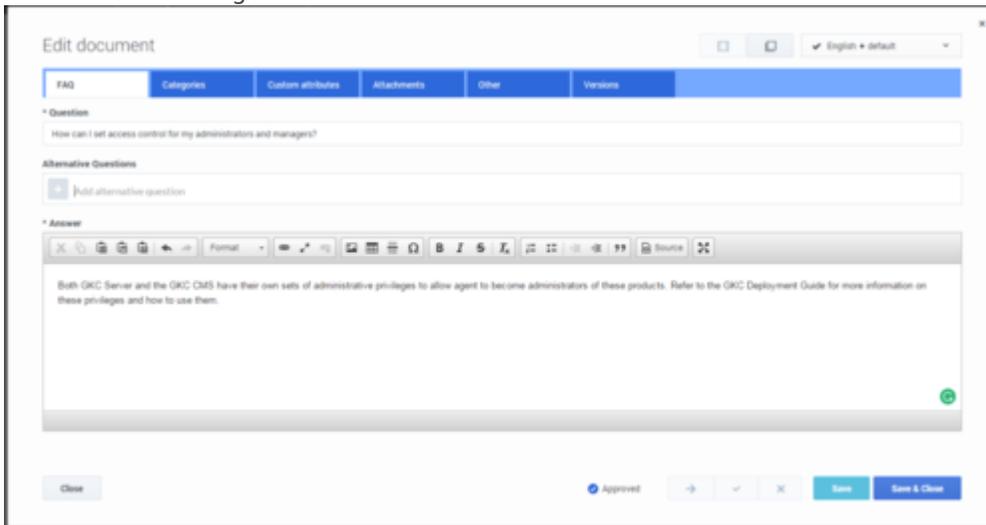
1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.



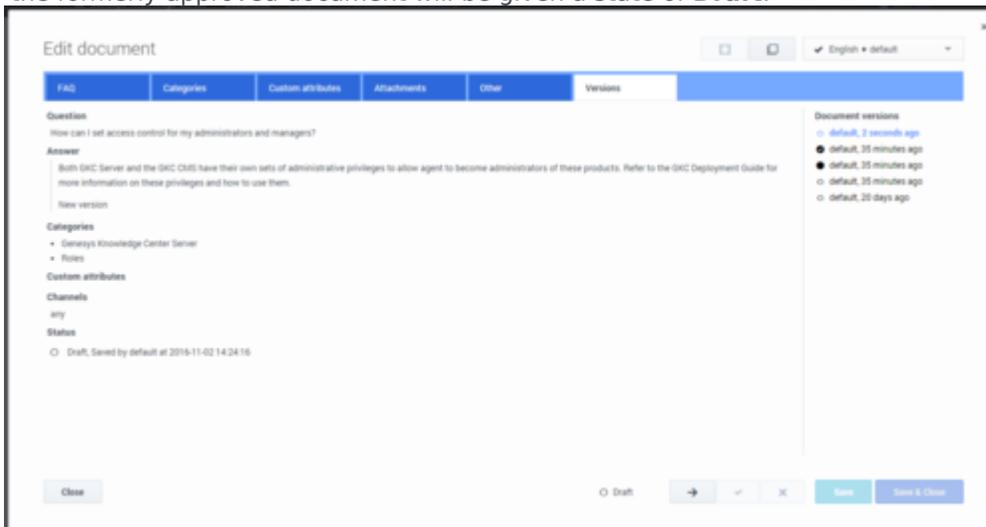
The screenshot shows the Genesys Knowledge Center interface. The top navigation bar includes "Genesys Knowledge Center", "Documents", "Categories", "Feedback", and "Modifications". The user is logged in as "John Doe". The main content area displays a list of documents under the "Documents" tab. The table has columns for "Question", "Attachments", "Status", "Channels", "Valid from", "Valid to", and "Modified". The first document is "Can I use Genesys Knowledge Center as a virtual assistant?" with a status of "Published" and a modified date of "2016-11-02 13:48:46". The last document is "Is agent feedback treated differently from customer feedback?" with a status of "Draft" and a modified date of "2016-10-13 13:27:15".

Question	Attachments	Status	Channels	Valid from	Valid to	Modified
Can I use Genesys Knowledge Center as a virtual assistant?		Published	any			2016-11-02 13:48:46
Can I configure my knowledge article approval workflow and lifecycle?		Published				2016-10-13 13:27:20
How can I assign Genesys Knowledge Center Plugins to my agents?		Published				2016-10-13 13:27:20
How can I set access control for my administrators and managers?		Published				2016-10-13 13:27:19
How can I archive older knowledge base articles?		Published				2016-10-13 13:27:18
Does Genesys Knowledge Center know how much time a person spends reading each article?		Draft				2016-10-13 13:27:17
How can I add search capability to a custom agent desktop?		Draft				2016-10-13 13:27:16
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI?		Draft				2016-10-13 13:27:16
Can I prevent customers from seeing certain knowledge base articles?		Draft				2016-10-13 13:27:15
Is agent feedback treated differently from customer feedback?		Draft				2016-10-13 13:27:15

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



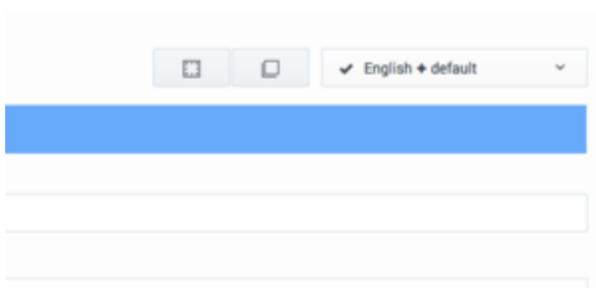
5. Save your changes or cancel them, using the appropriate buttons.
6. Every time you make a change, a new version of the document will be created and the new version of the formerly approved document will be given a state of **Draft**.



End

Copying content from one document version to another

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



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 duplicated 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.

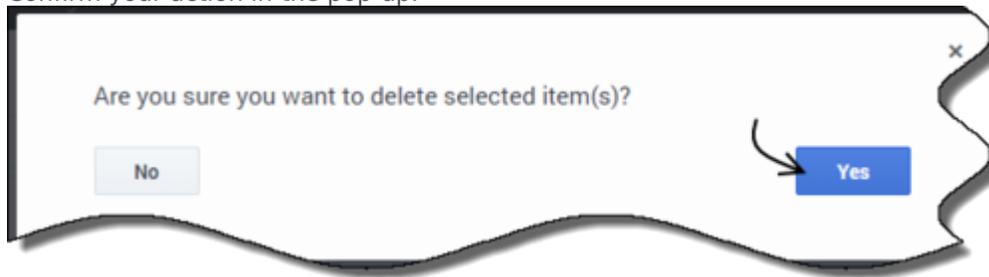
Important

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.

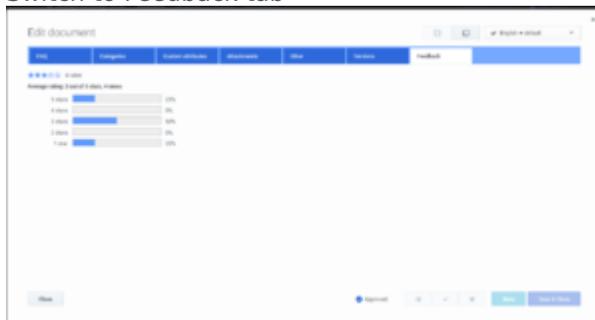


End

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



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.

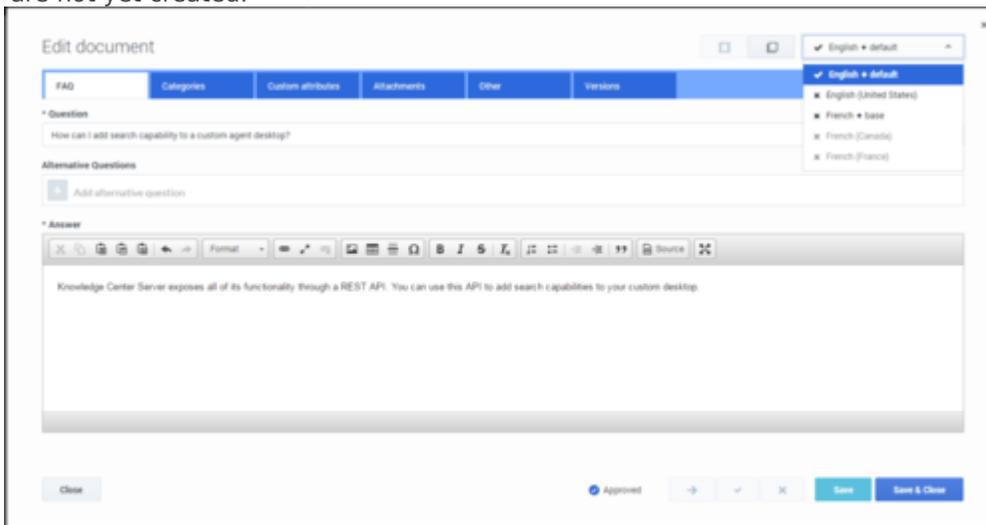
Creating a new language version of a document

Prerequisites:

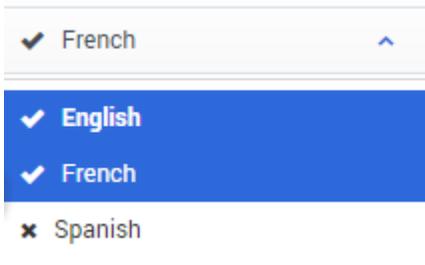
- If you are not currently in the document where you wish to add a new language, select the document from the list of documents and click **Edit**.

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.



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.



End

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.

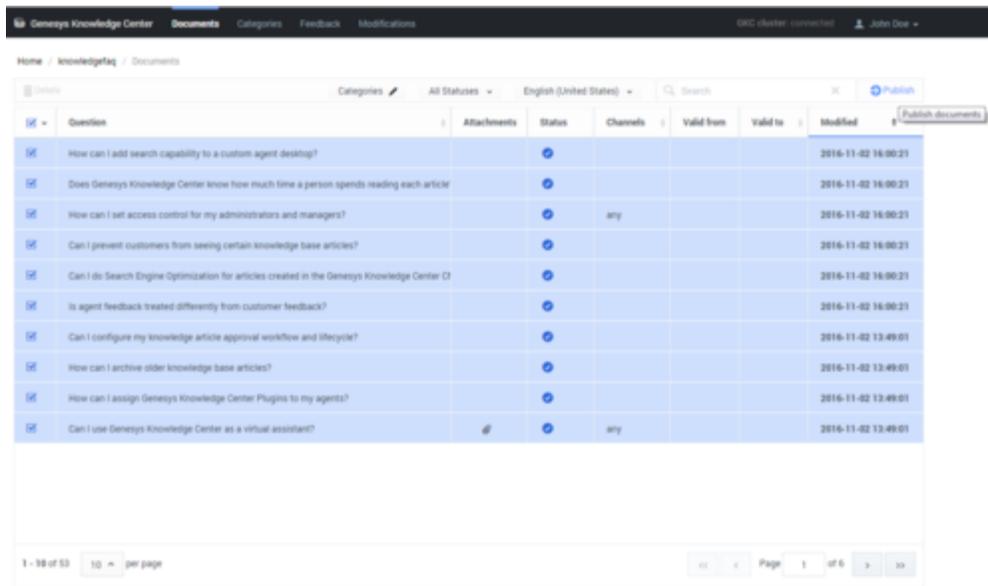
Documents can be published from base language if no regional languages have been configured. If regional languages are configured for base language, documents should be published directly from regional languages. If there is no regional version for a document, the version from base language will be published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

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**.
3. 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.



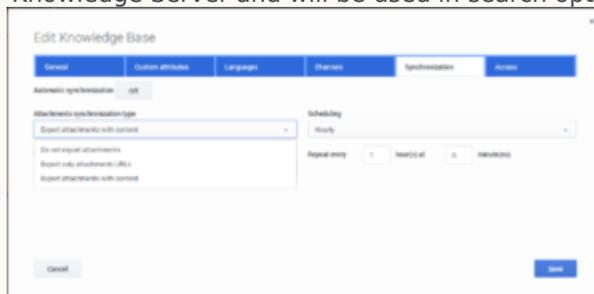
Question	Attachments	Status	Channels	Valid from	Valid to	Modified
How can I add search capability to a custom agent desktop?		🟢				2016-11-02 16:00:21
Does Genesys Knowledge Center know how much time a person spends reading each article?		🟢				2016-11-02 16:00:21
How can I set access control for my administrators and managers?		🟢	any			2016-11-02 16:00:21
Can I prevent customers from seeing certain knowledge base articles?		🟢				2016-11-02 16:00:21
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI?		🟢				2016-11-02 16:00:21
Is agent feedback treated differently from customer feedback?		🟢				2016-11-02 16:00:21
Can I configure my knowledge article approval workflow and lifecycle?		🟢				2016-11-02 13:49:01
How can I archive older knowledge base articles?		🟢				2016-11-02 13:49:01
How can I assign Genesys Knowledge Center Plugins to my agents?		🟢				2016-11-02 13:49:01
Can I use Genesys Knowledge Center as a virtual assistant?	📎	🟢	any			2016-11-02 13:49:01

End

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)



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

The screenshot shows the 'Edit Knowledge Base' window with the 'Synchronization' tab selected. The 'Automatic synchronization' toggle is set to 'Off'. The 'Attachments synchronization type' is set to 'Export attachments with content'. The 'Languages' dropdown is set to 'All languages'. The 'Scheduling' dropdown is set to 'Hourly'. The 'Repeat every' field is set to '1' hour(s) at '0' minute(s). There are 'Cancel' and 'Save' buttons at the bottom.

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

End

Synchronizing recent changes

Prerequisites

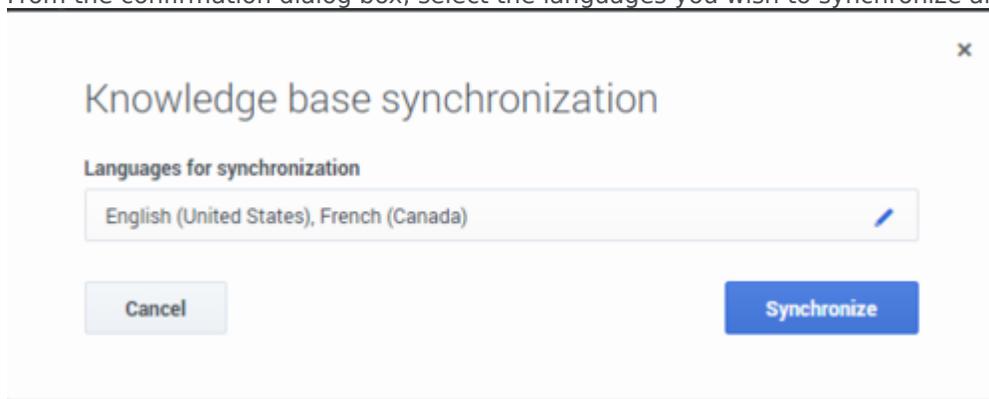
- A connection to the Knowledge Base must be available
- **Knowledge.CMS.Approver** privileges have been assigned to the user.

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	Approved	Modified	
<input type="checkbox"/>	How can I add search capability to a custom agent desktop?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Does Genesys Knowledge Center know how much time a person spends reading each article?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	How can I set access control for my administrators and managers?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I prevent customers from seeing certain knowledge base articles?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Is agent feedback treated differently from customer feedback?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I use Genesys Knowledge Center as a virtual assistant?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	Can I configure my knowledge article approval workflow and lifecycle?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	How can I archive older knowledge base articles?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	How can I assign Genesys Knowledge Center Plugins to my agents?	English	APPROVED		2016-11-02 13:49:01	

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



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

End

Working with Customer Feedback

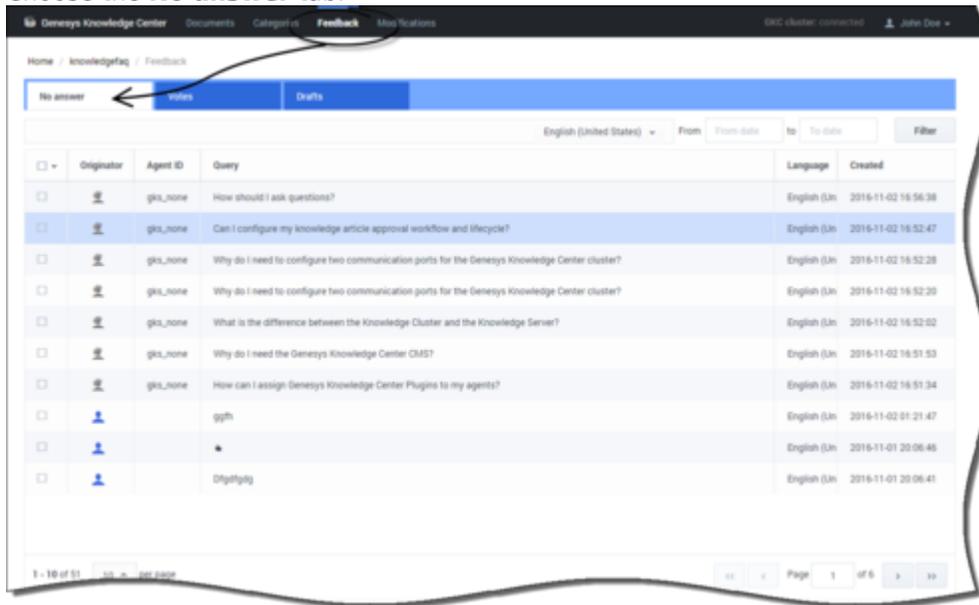
Processing a "No answer" Item

Prerequisites

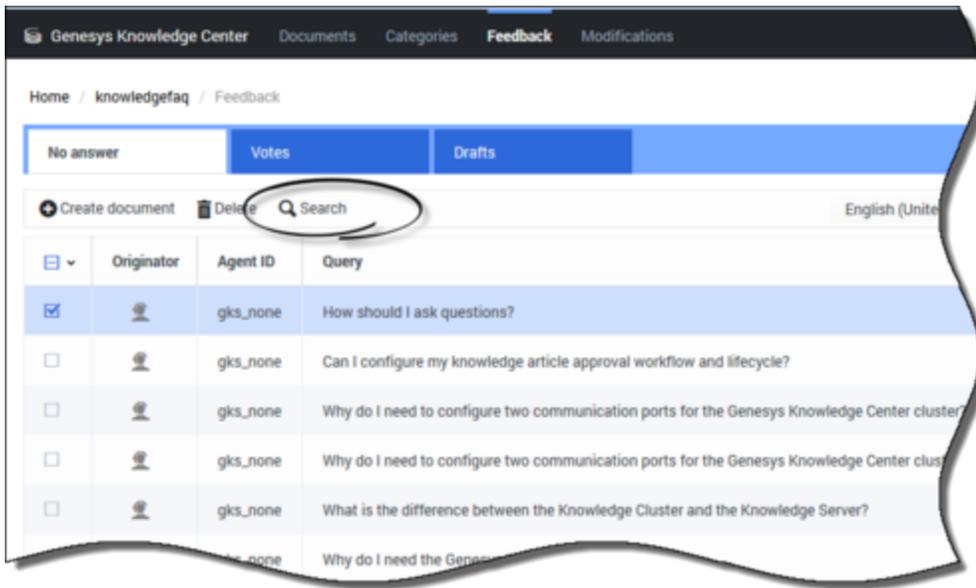
- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.
- **Knowledge.Author** privileges have been assigned to the user.

Start

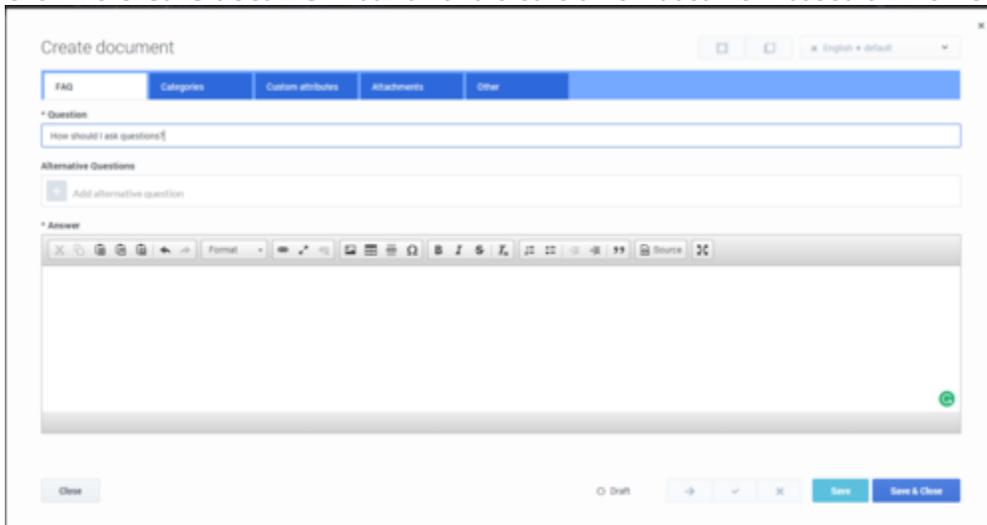
1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **No answer** tab.



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



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



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

End

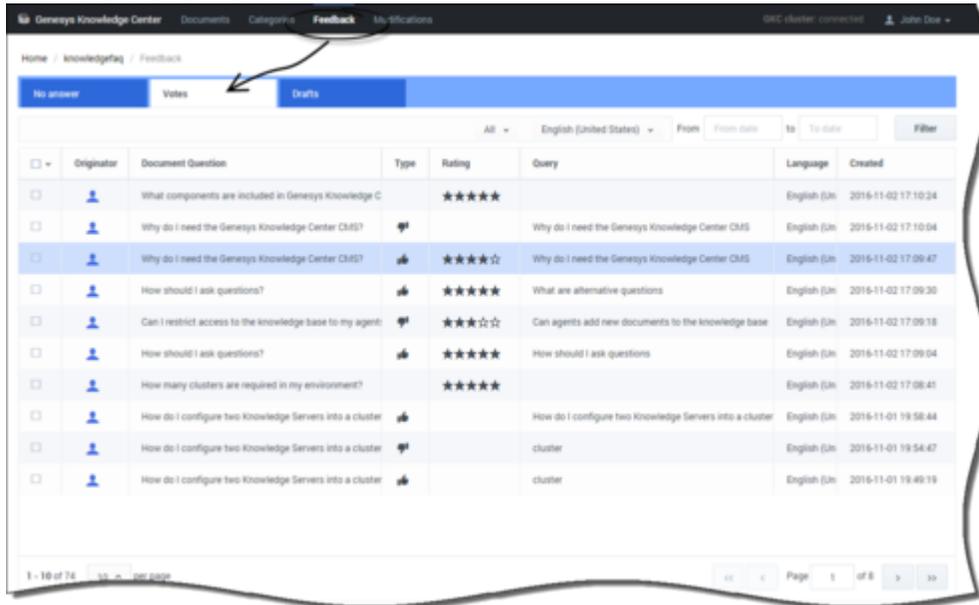
Processing Votes

Prerequisites

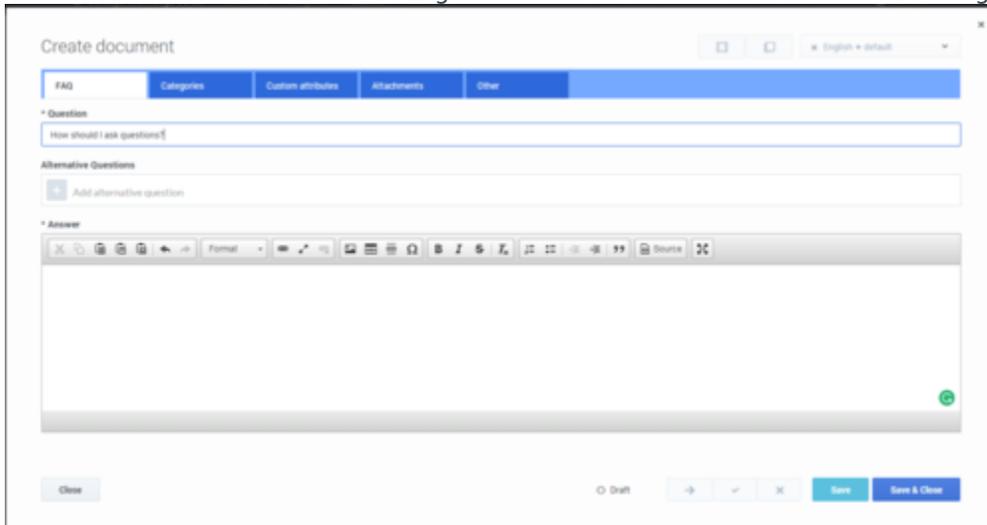
- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

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



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.



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

End

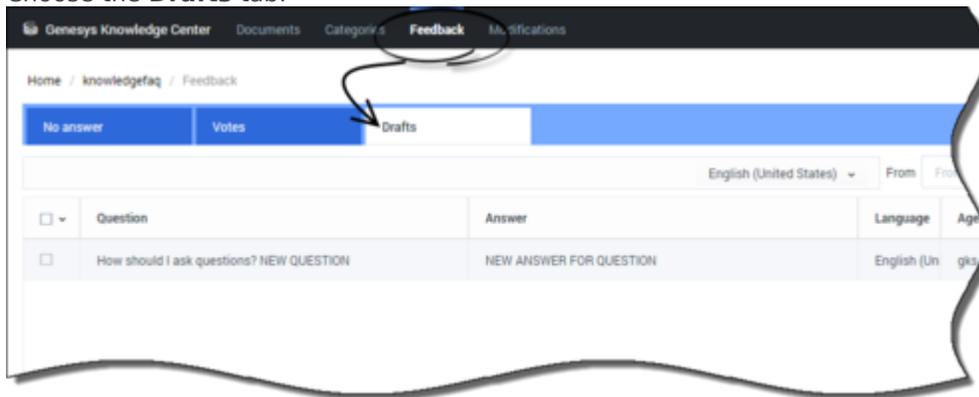
Processing Drafts

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



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:

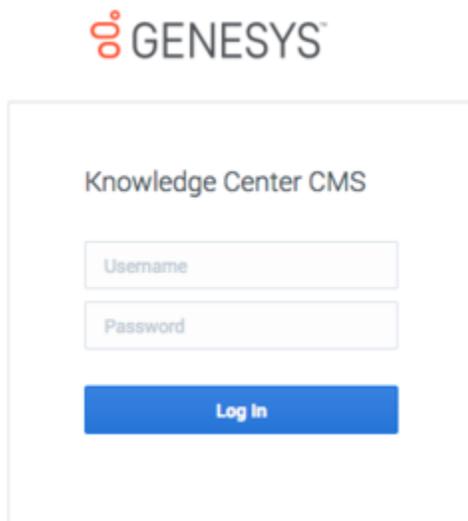
- Agents can use [Knowledge Center Plugin for Workspace Desktop Edition Help](#) to browse or search through the knowledge and apply it to customer's interactions.
- Customer can interact with the knowledge in [Genesys Widgets](#) and [Sample UI](#).
- Automated systems, such as routers, conversation 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:



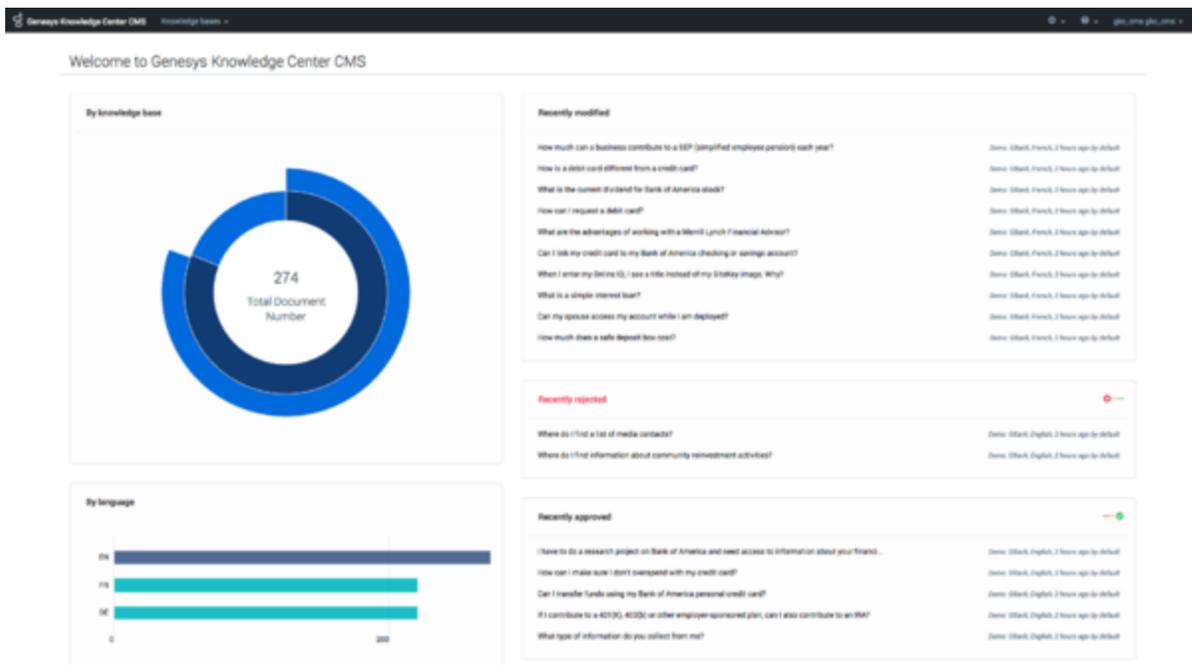
Enter your login and password in the dedicated boxes and hit the **Log In** button.

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.



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

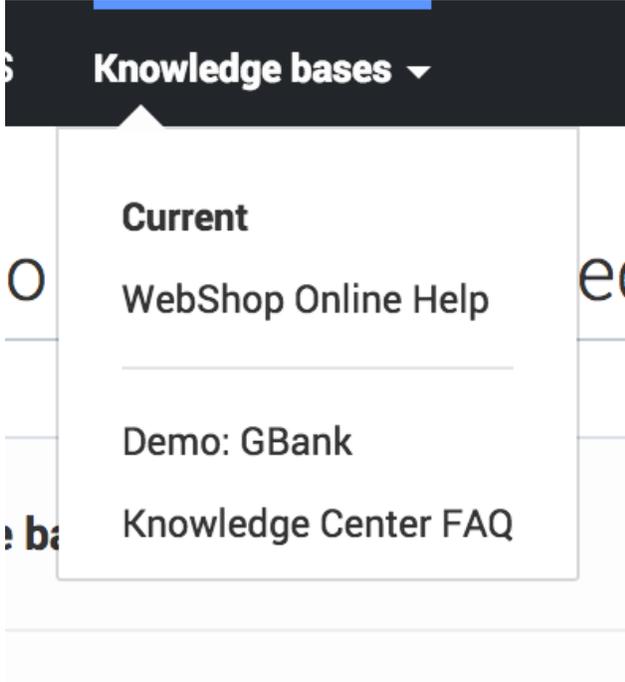
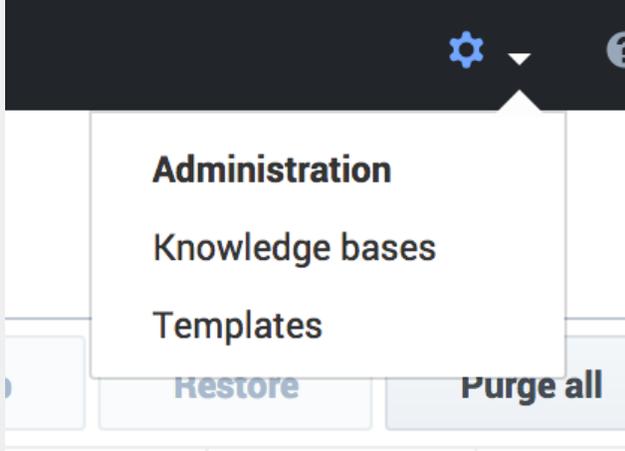
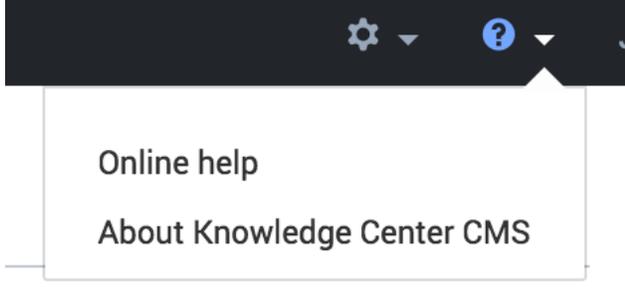
The top-most line is the main menu line providing you access to the functional areas of the product:

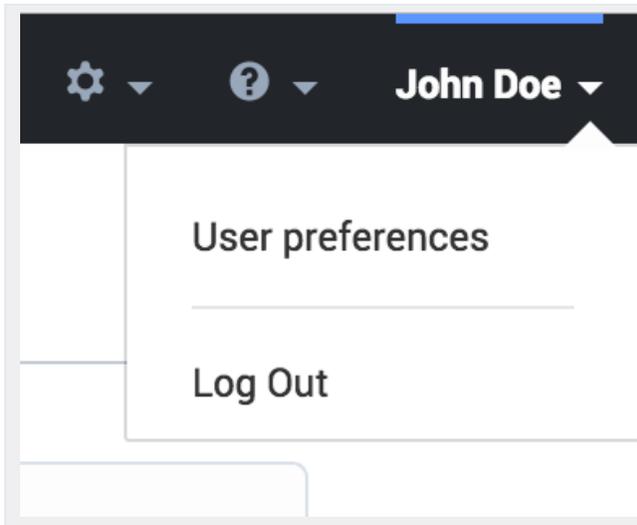


This main menu includes the following elements:

Genesys Knowledge Center CMS

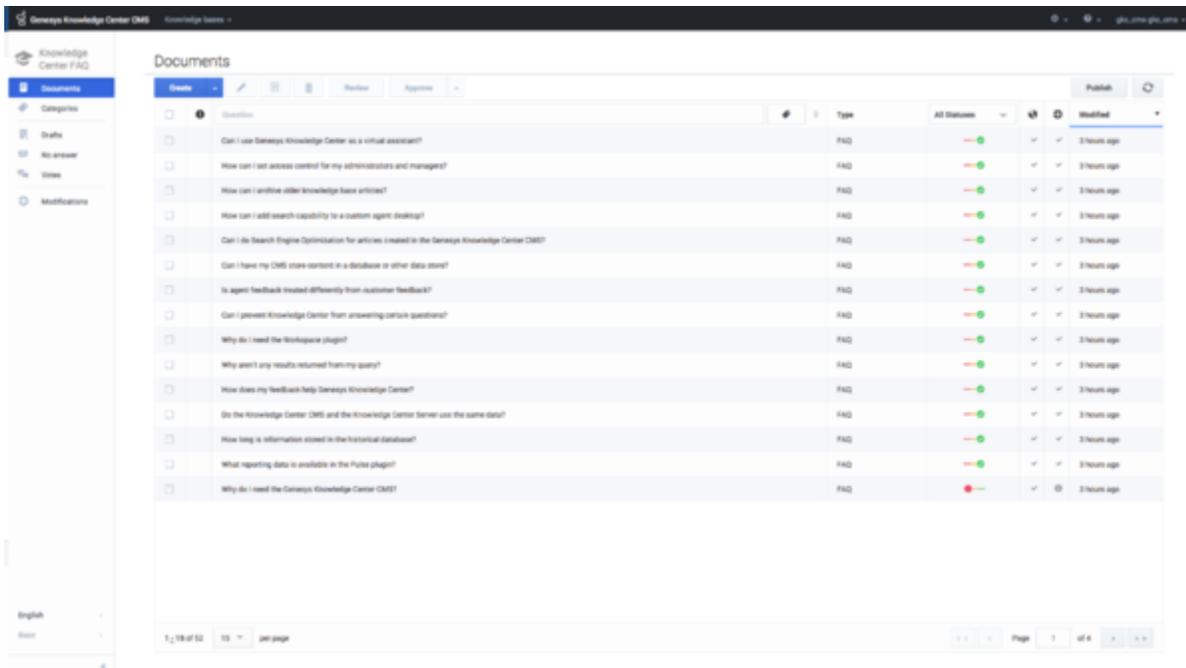
Product name: clicking this area will always bring you back to the Knowledge Dashboard

 <p>The screenshot shows a dark header bar with the text "Knowledge bases" and a downward-pointing chevron. Below the header, a white dropdown menu is open, listing the following items: "Current", "WebShop Online Help", "Demo: GBank", and "Knowledge Center FAQ".</p>	<p>Knowledge base menu: brings you to the authoring area within one of the knowledge bases. This is the area that is used by the knowledge workers (authors) and knowledge managers (approvers). Clicking this area will open a drop down list displaying the current knowledge base (just below "Current" label) as well as the list of all available knowledge bases (below the separation line). Clicking on one of the listed knowledge bases will bring you to the document authoring view for that knowledge base</p>
 <p>The screenshot shows a dark header bar with a gear icon and a downward-pointing chevron. Below the header, a white dropdown menu is open, listing the following items: "Administration", "Knowledge bases", and "Templates". At the bottom of the menu, there are two buttons: "Restore" and "Purge all".</p>	<p>Administration menu: opens the administrator area where knowledge administrators can create new knowledge bases, modify properties of existing ones, and do other administrative actions. Click the gear icon and then select Knowledge Bases from drop down menu.</p>
 <p>The screenshot shows a dark header bar with a gear icon, a question mark icon, and a downward-pointing chevron. Below the header, a white dropdown menu is open, listing the following items: "Online help" and "About Knowledge Center CMS".</p>	<p>Help menu: provides easy access to the online help documentation of the Knowledge Center CMS as well as the "About" window.</p>



Personal menu: the last element in the main menu indicates the name of the user who is currently logged in, and also allows that user to change user preferences and logout from the system.

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):



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 through 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:

The screenshot shows the 'Knowledge Center FAQ Documents' interface. It features a sidebar on the left with navigation icons. The main area displays a table of FAQ items. The table has columns for 'Question', 'Type', 'All Statuses', and 'Modified'. The 'All Statuses' column contains a red and green progress indicator and a checkmark. The 'Modified' column shows the time since the item was last updated.

Question	Type	All Statuses	Modified
How to create new knowledge base?	FAQ	6 hours ago	6 hours ago
What is a knowledge base?	FAQ	6 hours ago	6 hours ago
Why do I need the Genesys Knowledge Center CMS?	FAQ	6 hours ago	6 hours ago
Does Genesys Knowledge Center know how much time a person spends reading each article?	FAQ	14 hours ago	14 hours ago
Can I configure my knowledge article approval workflow and lifecycle?	FAQ	14 hours ago	14 hours ago
Can I use Genesys Knowledge Center as a virtual assistant?	FAQ	14 hours ago	14 hours ago
How can I archive older knowledge base articles?	FAQ	14 hours ago	14 hours ago
How can I set access control for my administrators and managers?	FAQ	14 hours ago	14 hours ago
How can I assign Genesys Knowledge Center Plugins to my agents?	FAQ	14 hours ago	14 hours ago
Should I let Genesys Knowledge Center Server know how many answers a user viewed?	FAQ	14 hours ago	14 hours ago
Can I have my CMS store content in a database or other data store?	FAQ	14 hours ago	14 hours ago
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	FAQ	14 hours ago	14 hours ago
How can I add search capability to a custom agent desktop?	FAQ	14 hours ago	14 hours ago

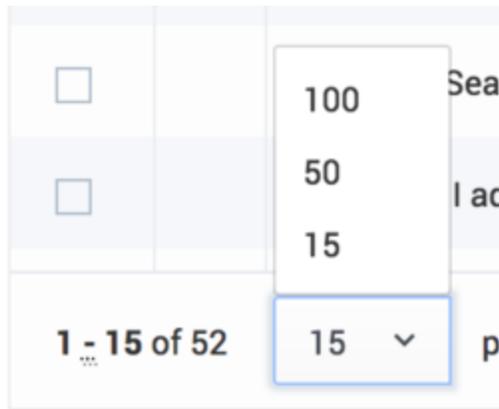
At the bottom of the table, there is a pagination control showing '1 of 52' items, '15' items per page, and 'Page 1 of 4'.

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:



- Navigation between pages:



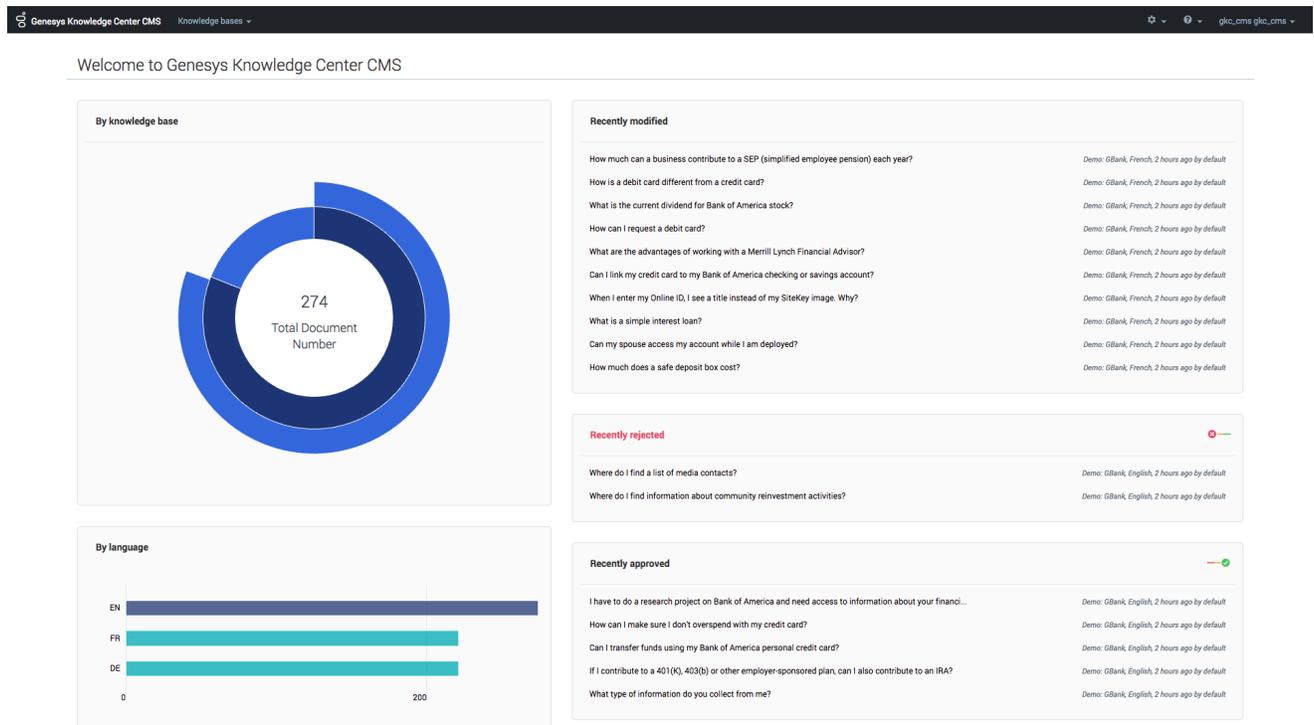
Knowledge Dashboard

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.

Tip

Click any of the images on this page to enlarge



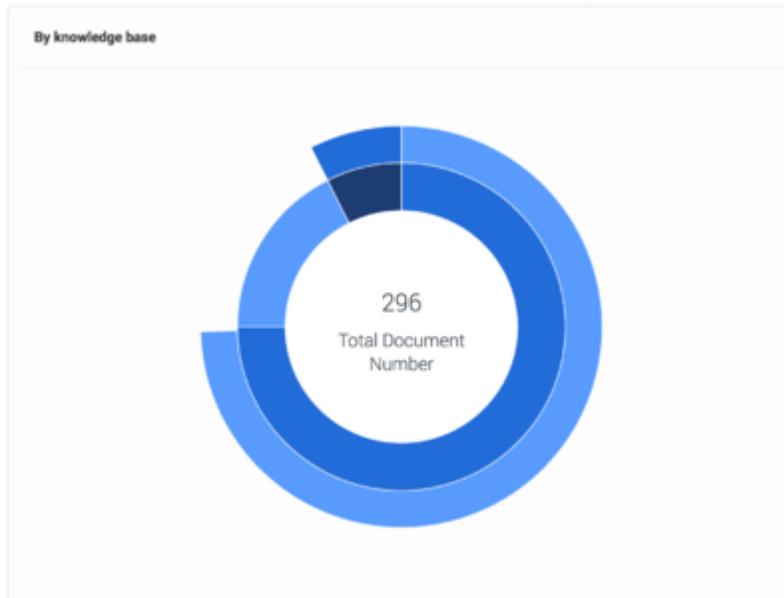
Knowledge analytics

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

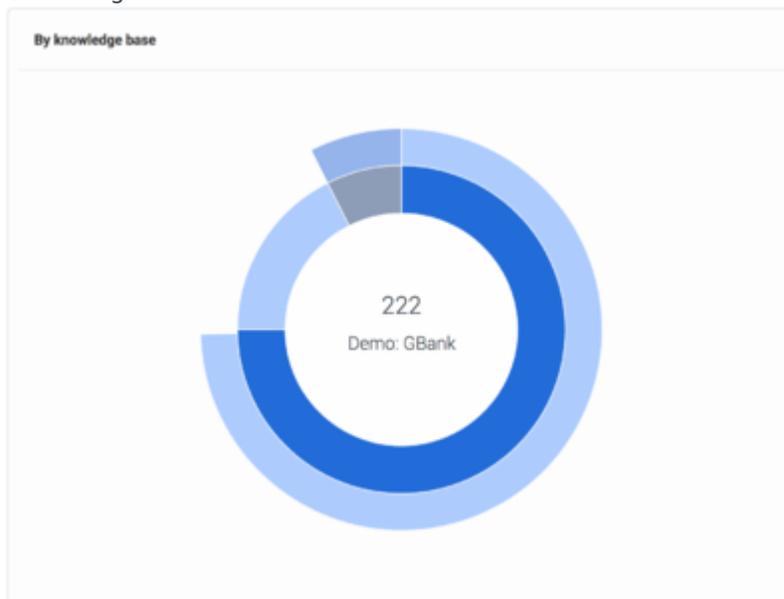
By knowledge base

This interactive sunburst diagram allows you to see:

- A total number of unique documents in knowledge bases

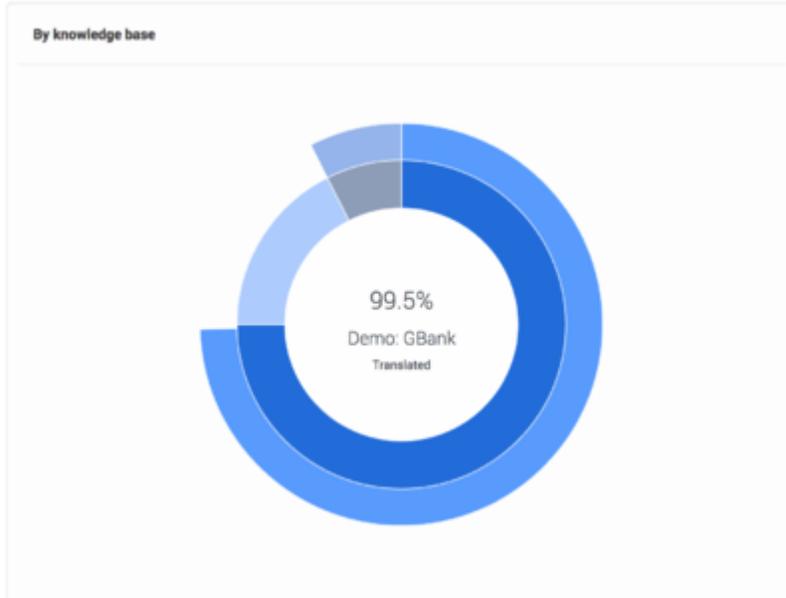


- The inner cycle of the diagram shows distribution of those documents between the different knowledge bases. A sector is assigned to every knowledge base, representing a percentage of the documents that belong to each knowledge base. If you hover your cursor over a sector, you see the name of the knowledge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

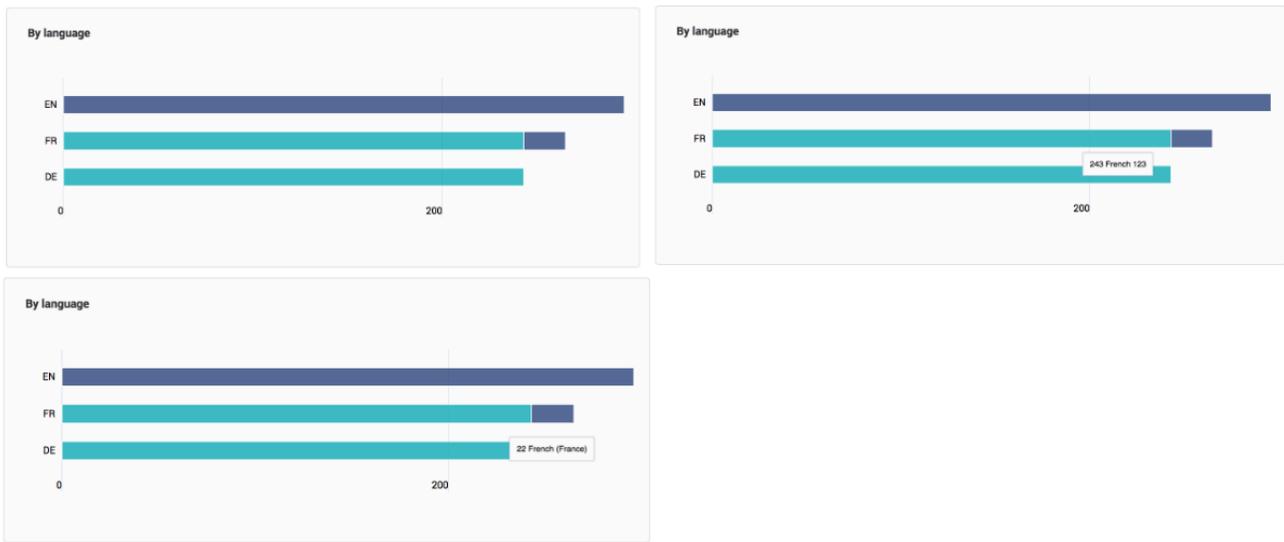
knowledge base (not in the relation of the total number of the documents within all knowledge bases). For example, say you have 100 unique documents in English and the knowledge base also has French and German languages available, with 50 and 70 documents translated. The inner cycle will show 100 as 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 Help, English, 28 seconds ago by gkc_cms
Can I cancel my order?	WebShop Online Help, English, 54 seconds ago by gkc_cms
How can I set access control for my administrators and managers?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
Can I use Genesys Knowledge Center as a virtual assistant?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
Can I configure my knowledge article approval workflow and lifecycle?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
How can I archive older knowledge base articles?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
Does Genesys Knowledge Center know how much time a person spends reading each article?	Knowledge Center FAQ, English, 2 minutes ago by gkc_cms
What is a banking center?	Demo: GBank, English, 2 minutes ago by gkc_cms
Where do I find information about community reinvestment activities?	Demo: GBank, English, 2 minutes ago by gkc_cms
Where do I find a list of media contacts?	Demo: GBank, English, 2 minutes ago by gkc_cms

- 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 gkc_cms
How can I archive older knowledge base articles?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
Where do I find information about community reinvestment activities?	Demo: GBank, English, 2 minutes ago by gkc_cms
Where do I find a list of media contacts?	Demo: GBank, English, 2 minutes ago by gkc_cms

- recently approved - last 5 approved documents

Recently approved	
How can I set access control for my administrators and managers?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
Can I use Genesys Knowledge Center as a virtual assistant?	Knowledge Center FAQ, English, 1 minute ago by gkc_cms
What is a banking center?	Demo: GBank, English, 2 minutes ago by gkc_cms
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	
Can I cancel my order?	WebShop Online Help, English, 30 seconds ago by gkc_cms
Has my order been shipped?	WebShop Online Help, English, 2 minutes ago by gkc_cms
Does Genesys Knowledge Center know how much time a person spends reading each article?	Knowledge Center FAQ, English, 4 minutes ago by gkc_cms
What type of information do you collect from me?	Demo: GBank, English, 4 minutes ago by gkc_cms
Do you sell spare parts?	WebShop Online Help, English, 22 hours ago by gkc_cms

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

1

2

3

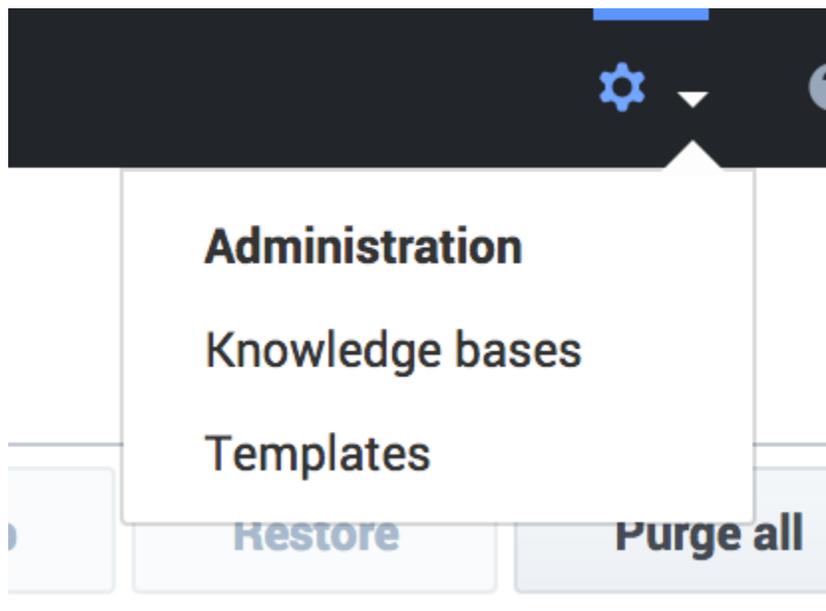
4

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.



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:



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**

New Knowledge base

← Save & Close

* Name
New

* Display Name

Description

* Document types
Choose among the following...

* Languages
Choose among the following...

* Default language
Choose among the following...

Inactive

Content source: CMS

Private

Accessible for any agent

Default document channels: any

Voting allowed

5-star rating allowed

Properties

3. Click **Save & Close**.

Important

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

 Inactive	Inactive (default) - If you select the inactive status for your Knowledge Base neither your customers nor your agents will be able to search for information in that knowledge base. Knowledge authors and knowledge administrators can still use the base to prepare content stored in it. Inactive status is recommended when your knowledge base is not ready for prime time
---	--

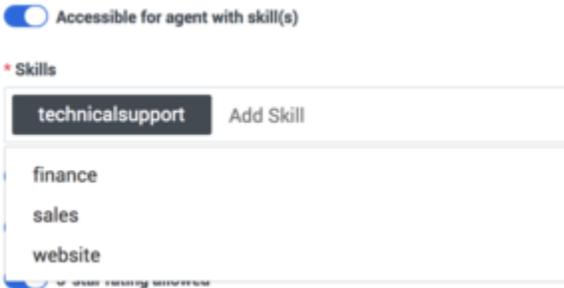
 Active	<p>Active - allows knowledge base to be available for search by agent and customer (according to set permissions)</p>
---	--

Private/Public

 Private	<p>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.</p>
 Public	<p>Public - Knowledge base visible for any user</p>

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	<p>Accessible for any agent (default) - knowledge base will be accessible to any agent without any restrictions</p>
 <p>The screenshot shows the configuration interface for skill-based access. It features a toggle switch labeled "Accessible for agent with skill(s)" which is turned on. Below the toggle, there is a section titled "* Skills" containing a search bar with "technicalsupport" entered and an "Add Skill" button. A list of skills is displayed below the search bar, including "finance", "sales", and "website".</p>	<p>Accessible for agent with skill(s) - allows you to specify list of skill-defining restrictions accessing the knowledge base.</p> <p>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.</p> <p>To add a skill:</p> <ol style="list-style-type: none"> 1. Select a skill from the list or start typing the skill name to limit the number of skills shown. 2. Press Enter or click the list element to add it to selection. <p>To remove a skill:</p> <ol style="list-style-type: none"> 1. Move your mouse over the selected skill.

2. Click the X icon after the skill name.

*** Skills**

finance x

Add Skill

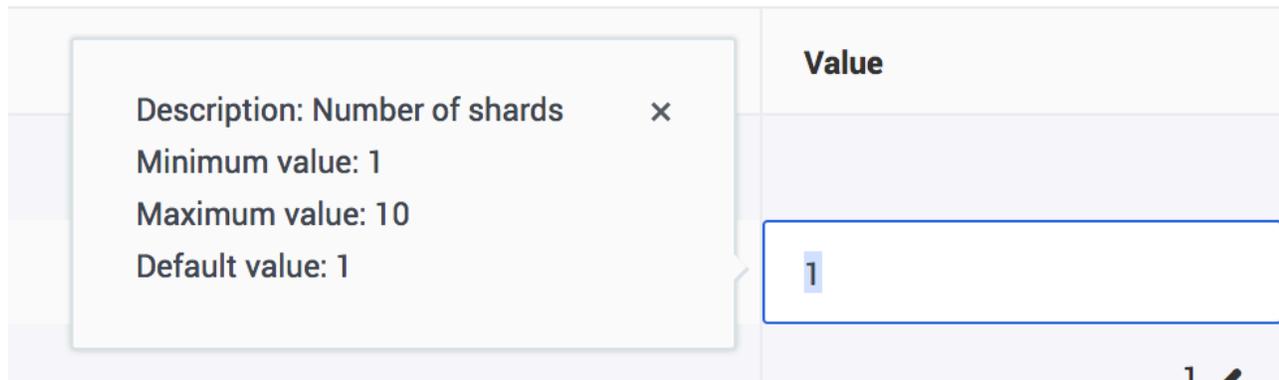
Behavior options

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

Behavior

Name	Value
<ul style="list-style-type: none"> ▼ 📁 index 	
Number of shards	1 ✎
Number of replicas	1 ✎
<ul style="list-style-type: none"> ▼ 📁 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 ✎

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 ×
Minimum value: 1
Maximum value: 10
Default value: 1

Value

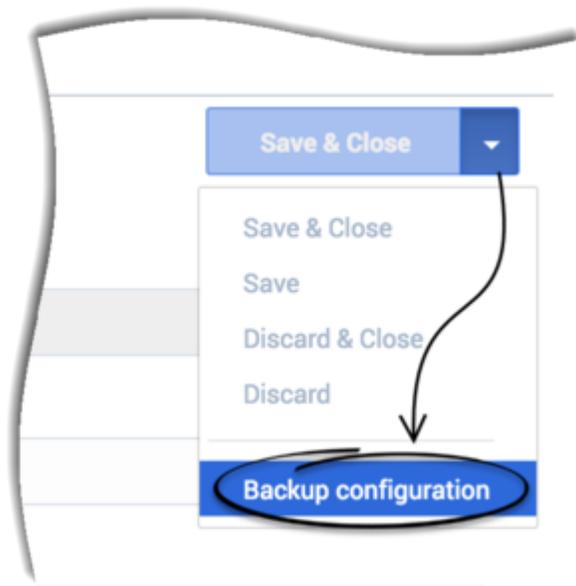
1

Importing knowledge base configuration

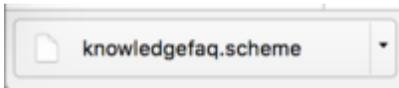
Cloning the knowledge base configuration

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

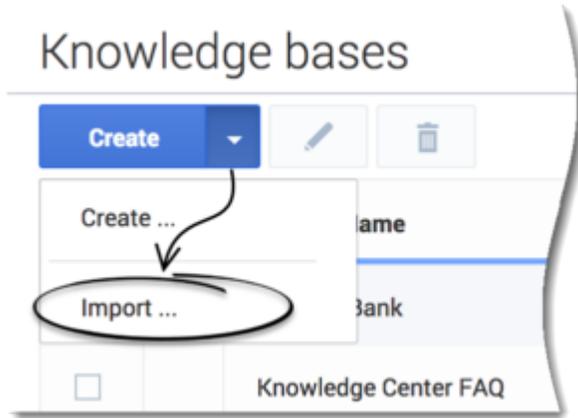
1. Open the list of knowledge bases.
2. Open the knowledge base you wish to clone.
3. Click the drop-down menu next to the **Save & Close** button.
4. Select the **Backup configuration** menu:



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



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



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



- 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.

Important

You must change the knowledge base ID. You cannot have more than one knowledge base with the same ID.

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.

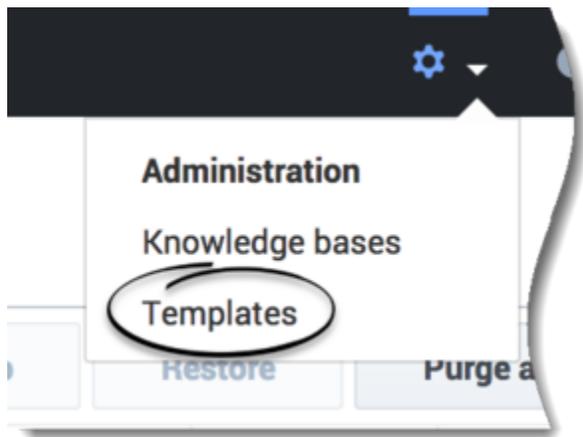
Templates

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:



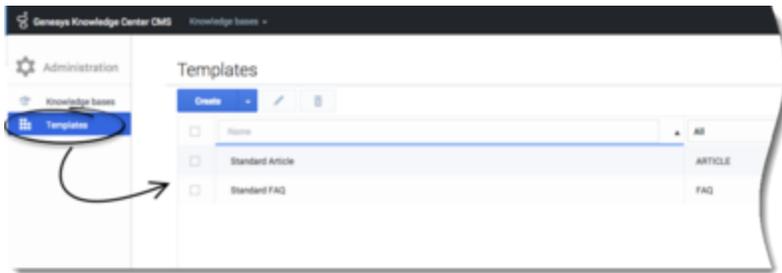
Document templates allow you to define:

- 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:



From this view you can:

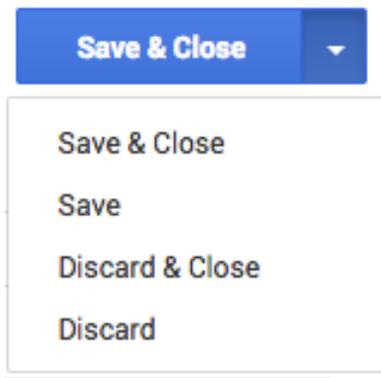
- create new template:
 - from empty template
 - using previously exported template
- modify existing template
- delete existing template
- disable template (to prevent new documents to be created using this templates)
- filter out the list of the templates by:
 - template name
 - document type
 - enable/disable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

The screenshot shows the CMS interface for editing a template titled "Article with Agent Interaction". The interface includes a "Save & Close" button in the top right corner. Below the title, there are several input fields: "Section article", "Name" (containing "Article with Agent Interaction"), "Description" (containing "Common Article Document providing public content section and guidance section for the agents"), and "Document type" (set to "Article"). A "Enabled" toggle switch is checked. Under the "Sections" heading, there are two sections: "Common" (with a "Required" toggle checked) containing a text area for "Provide publicly visible content in this section" and a dropdown menu set to "Public"; and "Guide" (with an "Optional" toggle checked) containing a text area for "Provide internal instruction for the agent on the internal systems used" and a dropdown menu set to "Agents only". An "Add section" link is at the bottom left.

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



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.

Tip

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

Templates explained

Field	Description
Id	<p>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.</p> <p>Id restrictions:</p> <ul style="list-style-type: none"> • 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.
Document type	<p>Allows you to select one of the basic document types that are extended with the templates. Supported types are:</p> <ul style="list-style-type: none"> • 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 not be able to create any new documents using this template.
Sections	<p>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.</p> <p>Important Every template must have at least one section.</p>

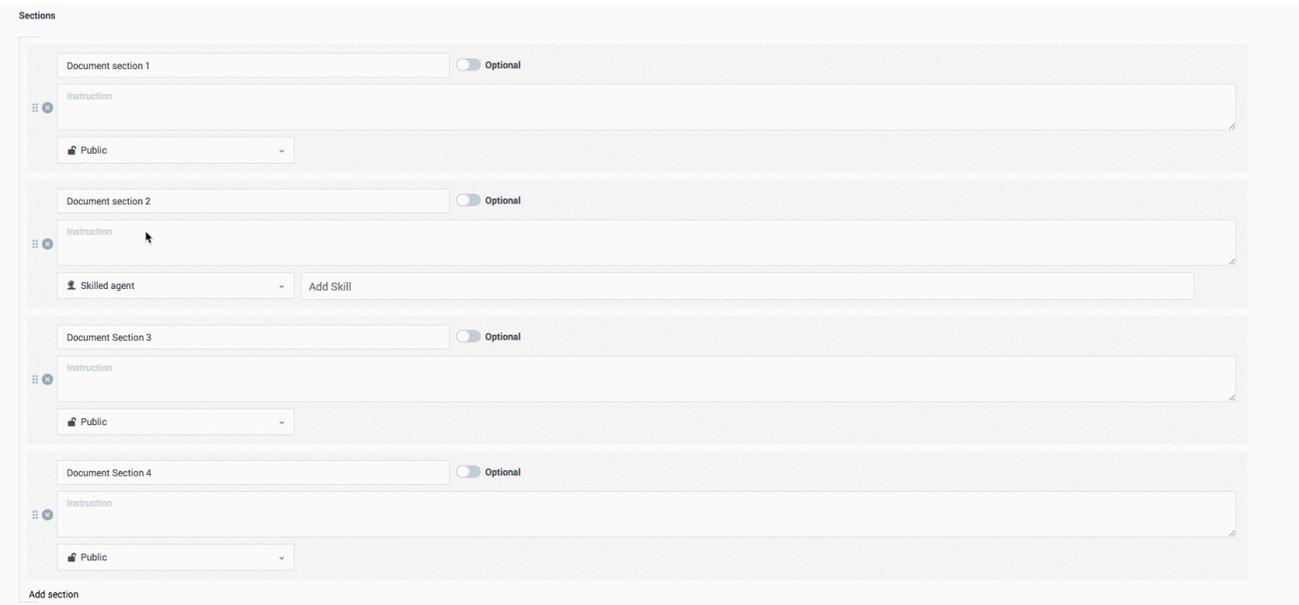
Field	Description
	<p>For every section you are able to provide:</p> <ul style="list-style-type: none"> • name - visible for authors only when editing the document in CMS • instruction - visible for authors only when editing the document in CMS • mandatory flag that will instruct CMS that document cannot be sent for approval until content for this section is provided. • visibility rule <p>Important At least one section in document must be mandatory.</p> <p>A section can be:</p> <ul style="list-style-type: none"> • 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:

The screenshot shows the CMS interface for editing a template. At the top, there is a dropdown menu labeled 'Article'. Below it is an 'Enabled' toggle switch. The main section is titled 'Sections' and contains a form for 'Document section 1'. This form has a 'Mandatory' toggle switch, an 'Instruction' text area, and a 'Public' dropdown menu. At the bottom left of the form, there is an 'Add section' link.

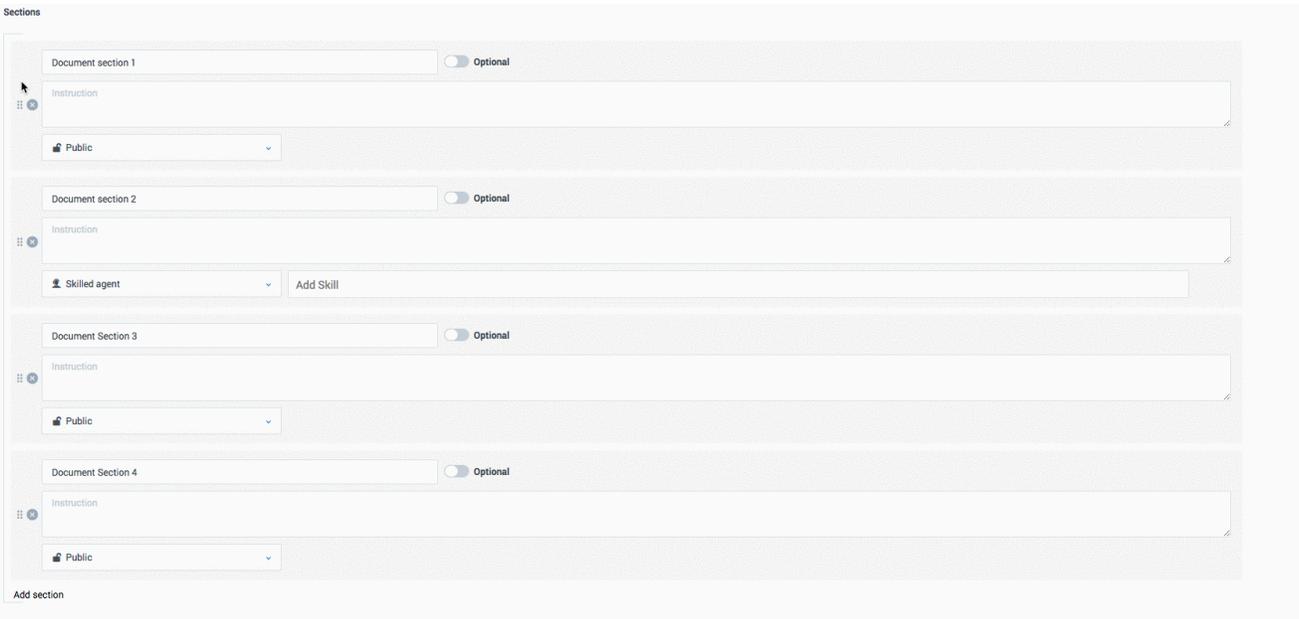
- Delete a section by clicking: .



- 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.



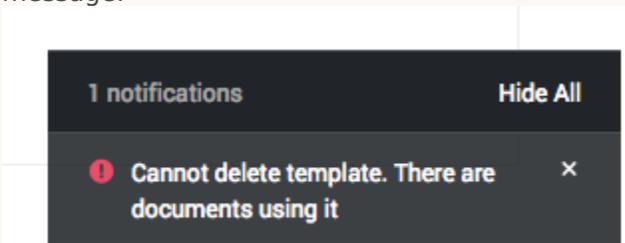
Deleting templates

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:

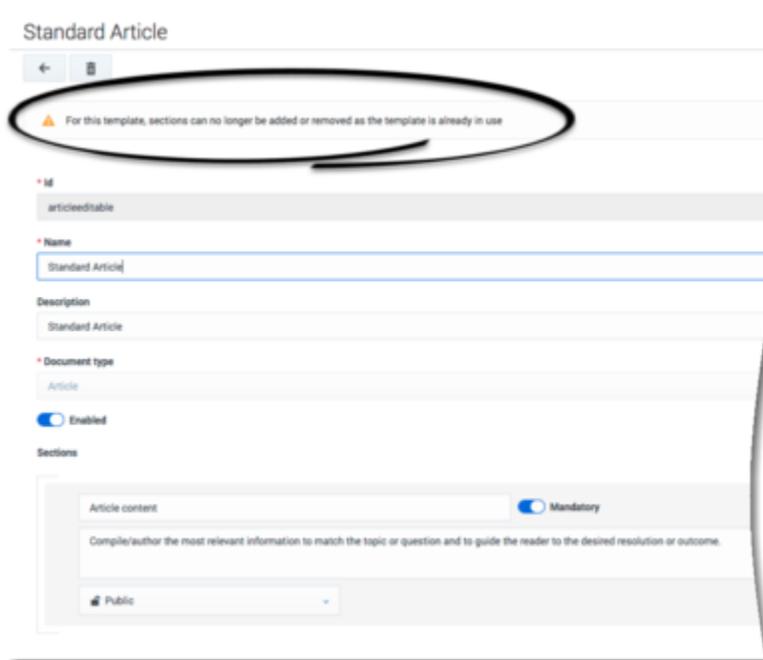


Alternatively, you can double-click on the template to enter edit view.

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).

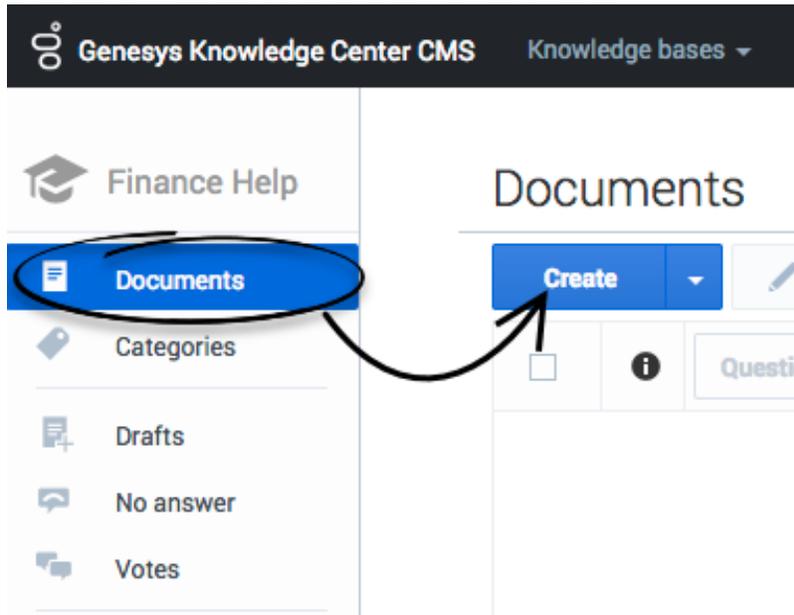
Templates that have restrictions on the modification will have special notice (1) shown when entering the edit mode:



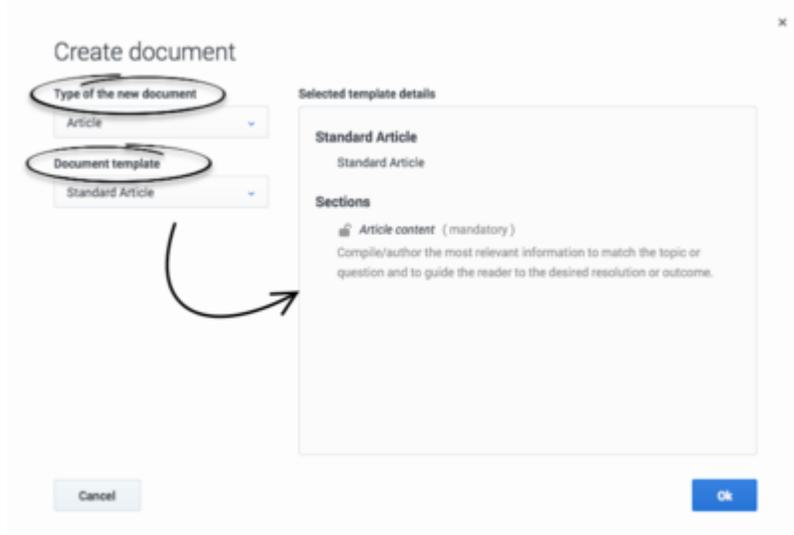
Using templates

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:



2. 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):



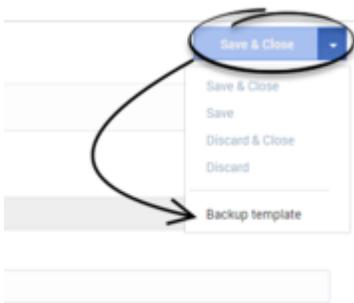
3. Click **Ok** to create the document.

Importing templates

Cloning Template

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

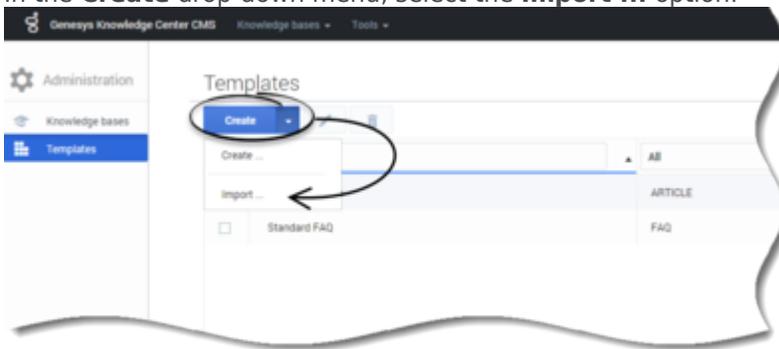
1. Open the list of templates.
2. Open the template you wish to clone.
3. Click the drop-down menu next to the **Save & Close** button.
4. Select **Backup configuration:**



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



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



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



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

Important

You must change the template ID. You cannot have more than one template with the same ID.

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

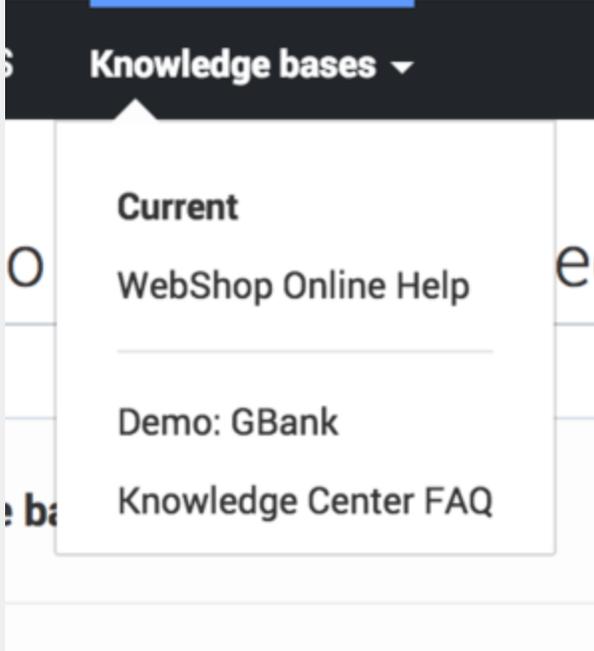
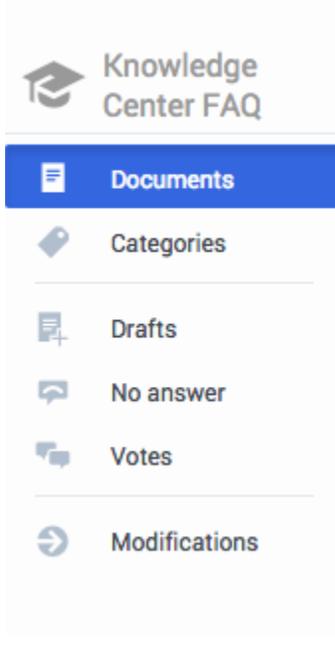
Important

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

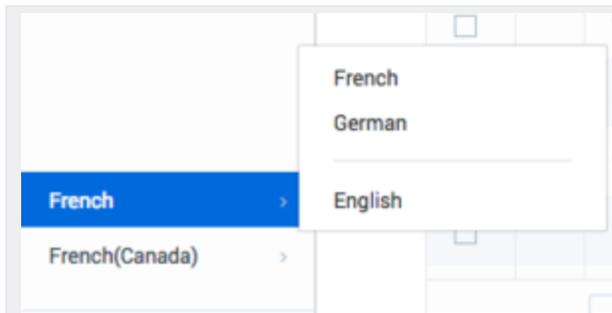
- Knowledge.CMS.Category.Author
- Knowledge.CMS.Document.Author

For more information, see [Access Permissions](#).

The authoring area

	<p>To open the authoring area, click the Knowledge bases menu in the main menu of the application.</p> <p>This displays the current knowledge base (just below the Current label) as well as a list of all available knowledge bases (below the separation line). Clicking one of the listed knowledge bases displays the document authoring view for that knowledge base.</p>
	<p>Use the sidebar menu on the left to access these types of knowledge base content:</p> <ul style="list-style-type: none"> • Authoring <ul style="list-style-type: none"> • Documents—the documents in the knowledge base • Categories—knowledge base categories • Feedback <ul style="list-style-type: none"> • Drafts—draft documents submitted by agents (using Workspace) • No answer—queries for which no relevant results were found • Votes—relevancy and 5-star ratings submitted by agents and consumers • Synchronization status <ul style="list-style-type: none"> • Modifications—a list of the knowledge base modifications that are waiting to be synchronized

Selecting a language



Select the language you want to use from the list at the bottom of the sidebar.

Note: The language that appears below the separator line is the default language for the knowledge base. Select this language to create a new document or category. Selecting any other language allows you to translate an existing document or category into the selected language.



For multi-regional languages, you can select the specific region you want to work with.

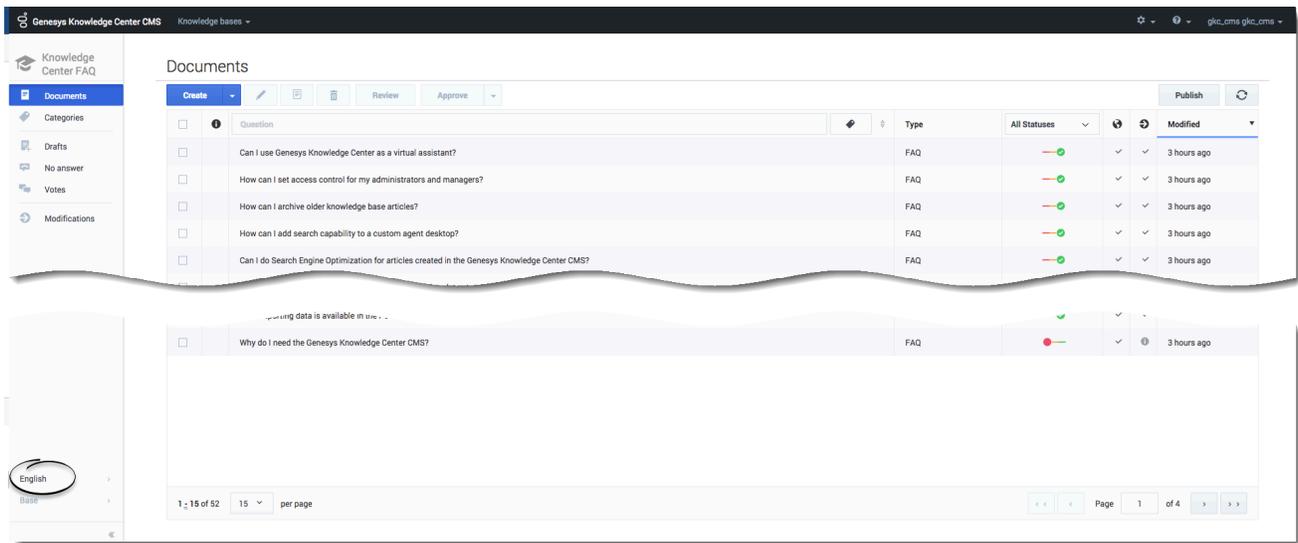
Note:

- Selecting the base language allows you to define content that will be re-used in all regional versions
- You must create a new document or category in the base language before you create a regional version.

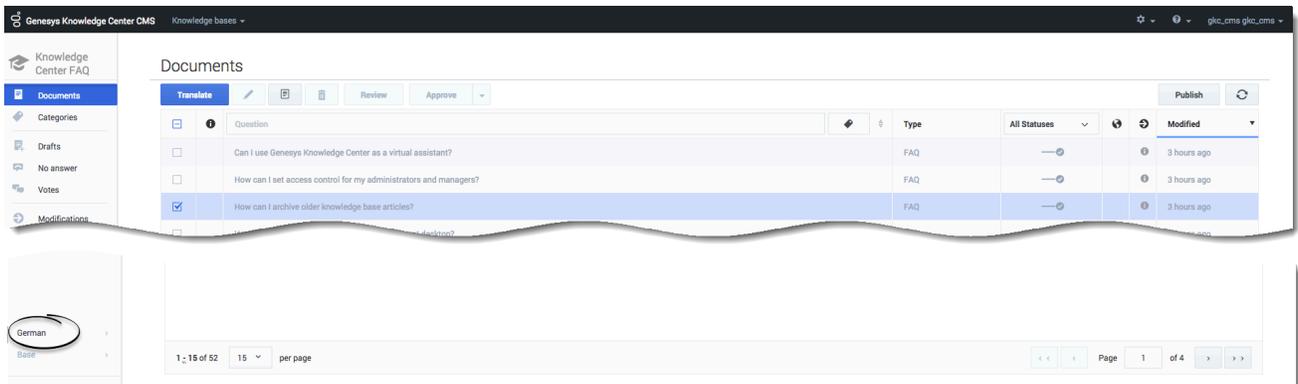
Working with documents

Displaying documents

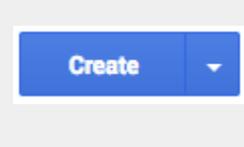
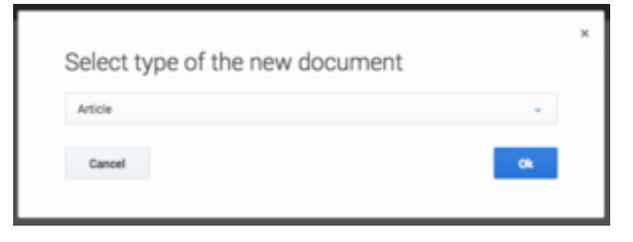
Select a knowledge base to display a list of its contents. If you select the default language, you can create documents and categories:

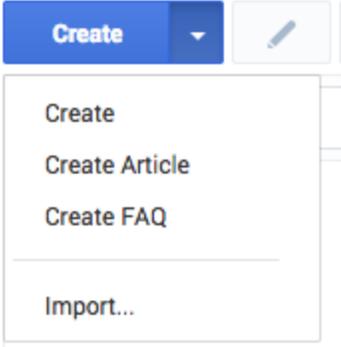
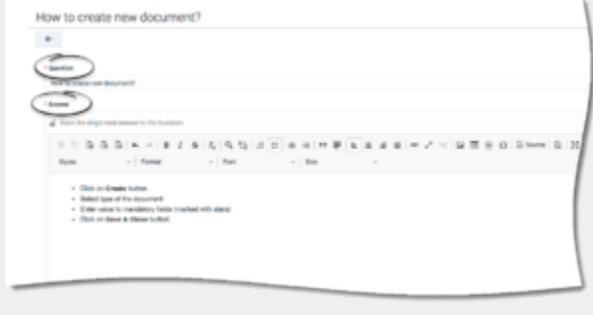
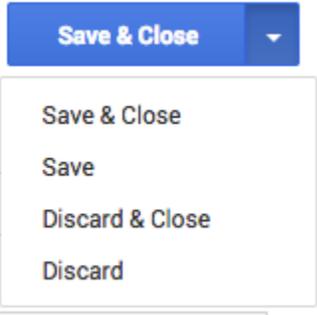


If you select any other language, you can translate an existing document or category into the selected language:

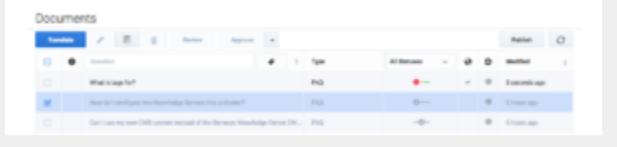


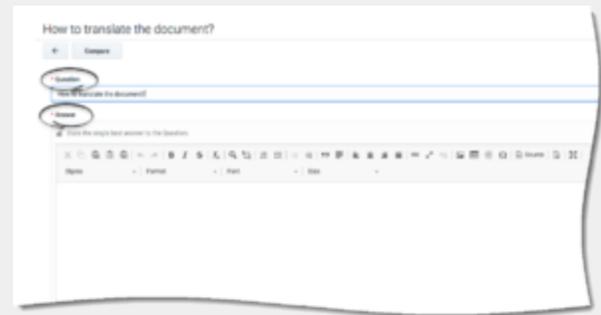
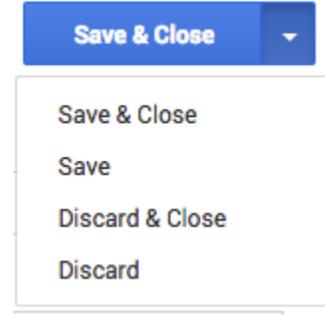
Creating a document

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

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

Translating a document

	<p>Select a document to translate to the current language.</p>
	<p>Click Translate.</p>

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

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



Document types

The Knowledge Center CMS supports two types of document:

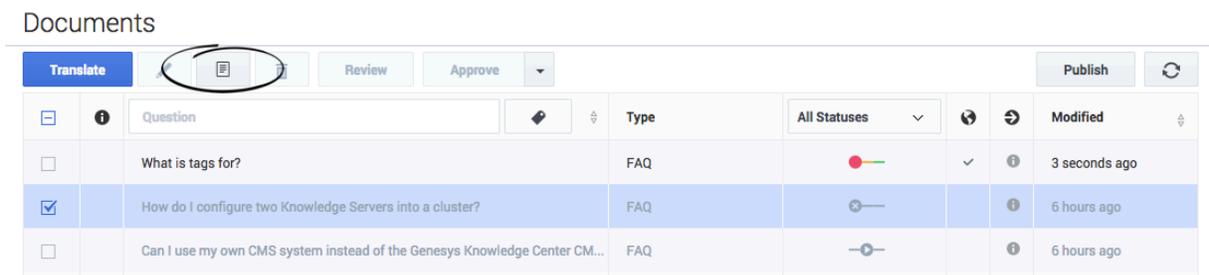
- **Frequently asked questions (FAQ)**—A list of questions and answers, all of which can be commonly asked in a specific context and which pertain to a particular topic. This format is often used on mailing lists and in other online forums, where common questions tend to be asked repeatedly.
- **Article**—An 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:

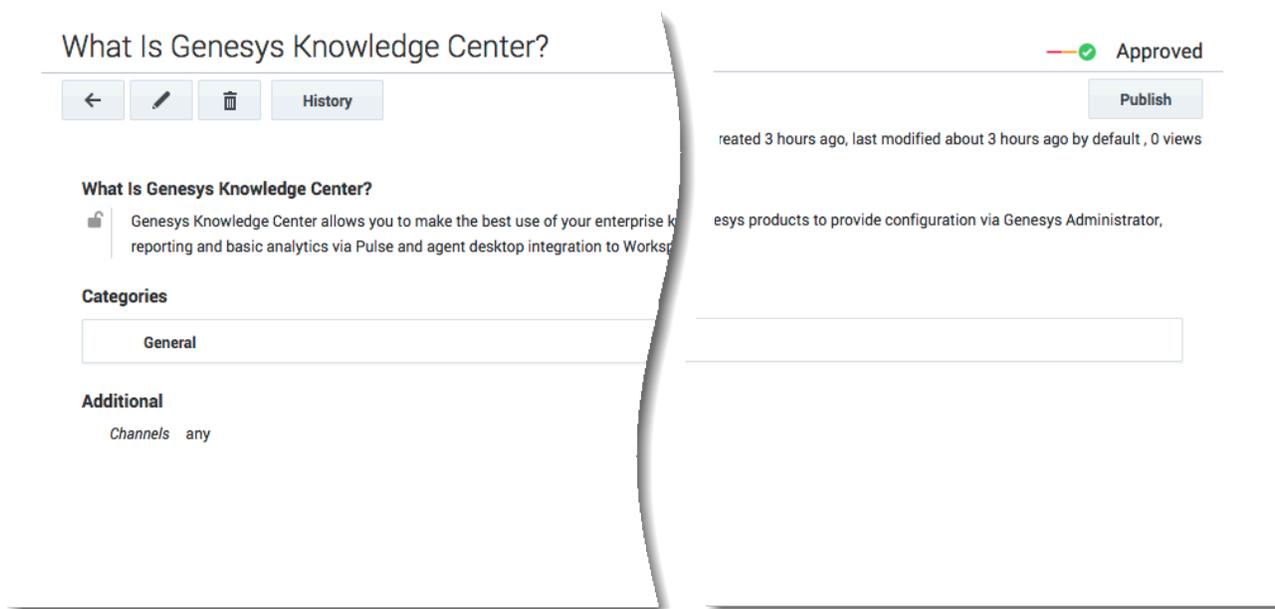
	FAQ	Article
Document name	Question	Title
Short Summary (plain text)		Summary
Document content (formatted text)	Answer	Description
Alternative names	Alternative Questions	Alternative Titles

Viewing a document

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



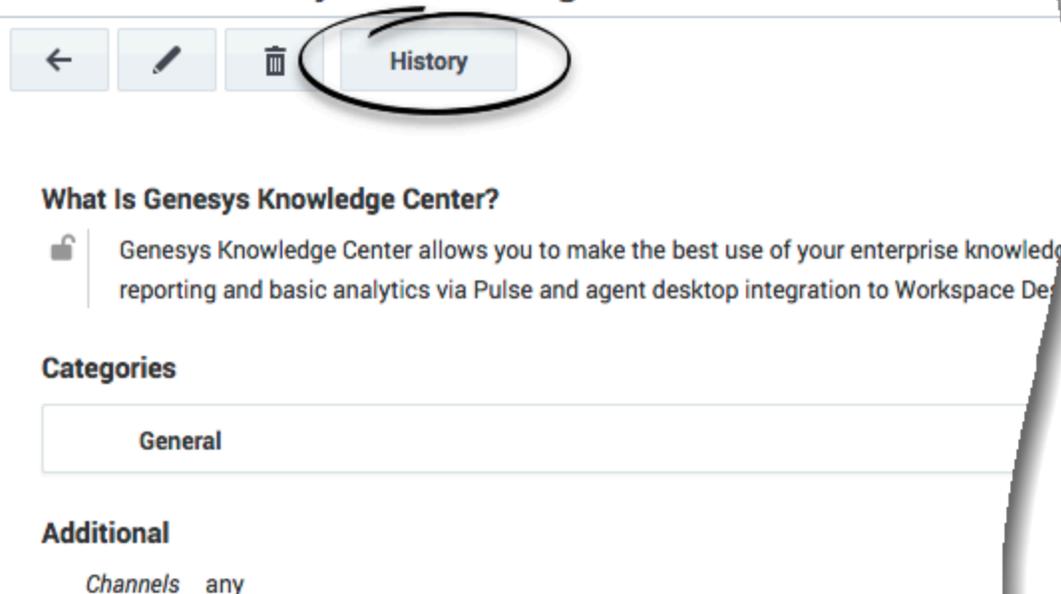
The document will look something like this:



Document history

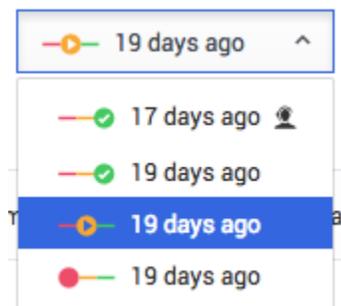
While you are viewing a document content, you can click the **History** button:

What Is Genesys Knowledge Center?



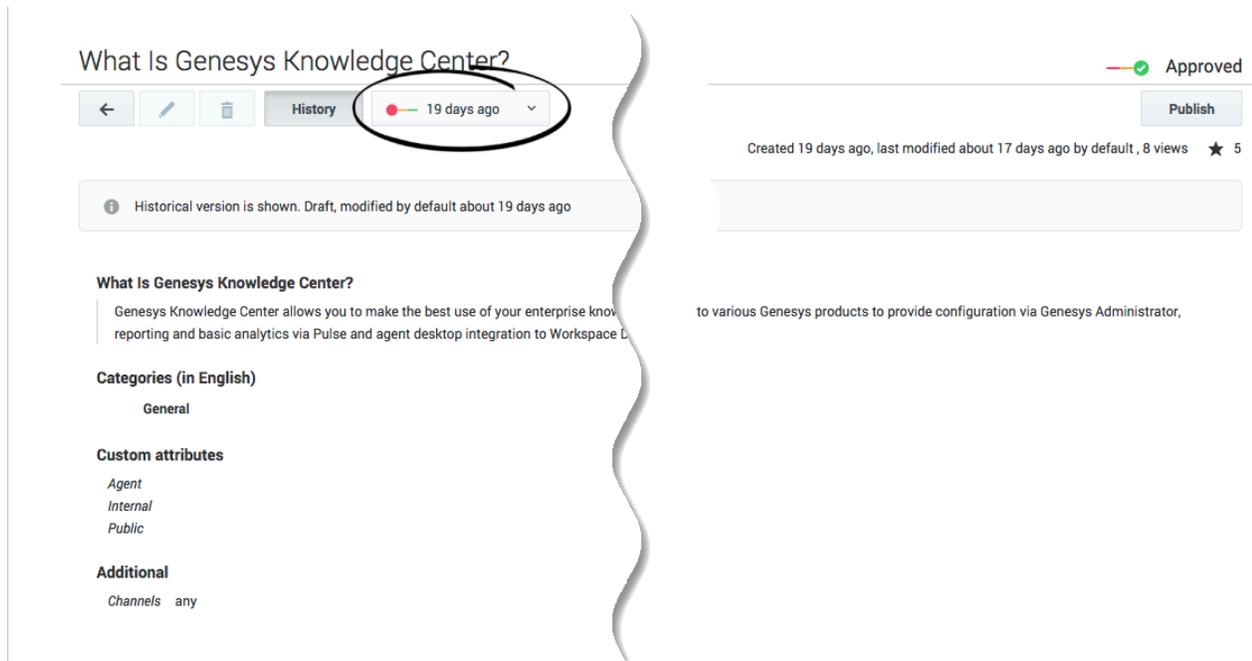
The screenshot shows a document titled "What Is Genesys Knowledge Center?". Below the title is a toolbar with four icons: a back arrow, a pencil (edit), a trash can (delete), and a button labeled "History". The "History" button is circled in black. Below the toolbar, the document content is partially visible, starting with a lock icon and the text "Genesys Knowledge Center allows you to make the best use of your enterprise knowledge reporting and basic analytics via Pulse and agent desktop integration to Workspace Des". Below the content, there are sections for "Categories" (with a "General" button) and "Additional" (with "Channels any").

This displays all of the versions of the document:



The screenshot shows a version history drop-down menu with five entries. Each entry consists of a colored circle, a date, and a user icon. The entries are: a blue circle with a white play button icon and "19 days ago" (highlighted in blue), a green circle with a white checkmark icon and "17 days ago" (with a user icon), a red circle with a white checkmark icon and "19 days ago", a blue circle with a white play button icon and "19 days ago", and a red circle with a white play button icon and "19 days ago".

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



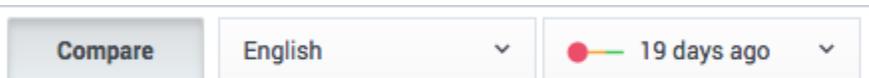
Each line in the history drop-down shows the following information about the version:



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



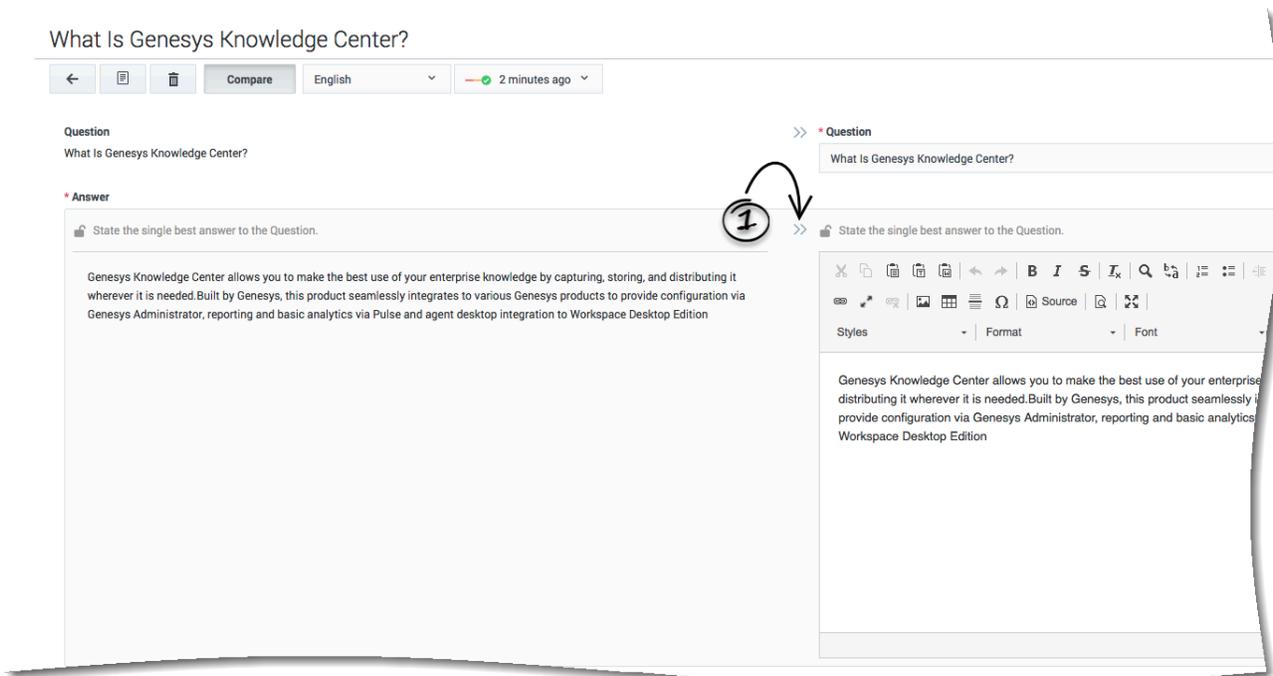
Select the desired language and version from the drop-down lists that appear.

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:

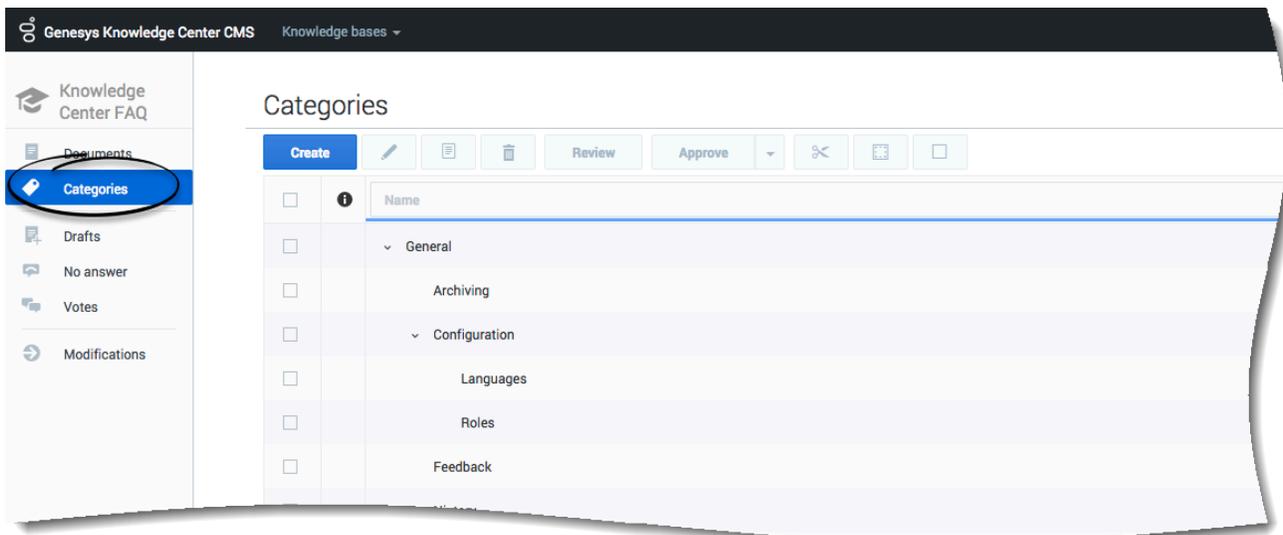


Click the Copy button **(1)** near a field to copy its value from the older version to the current one.

Working with Categories

Displaying categories

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



Creating a category

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

Category errors

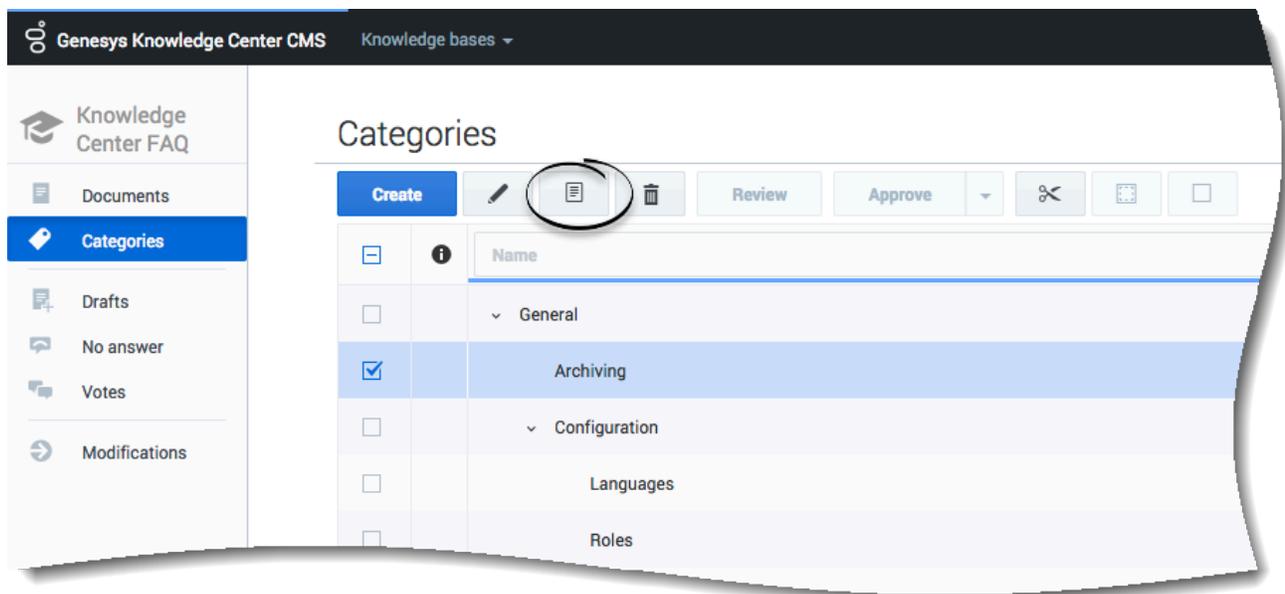
When you save a category, the Knowledge Center CMS validates the values you have entered into its fields. It highlights any fields that contain errors by:

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

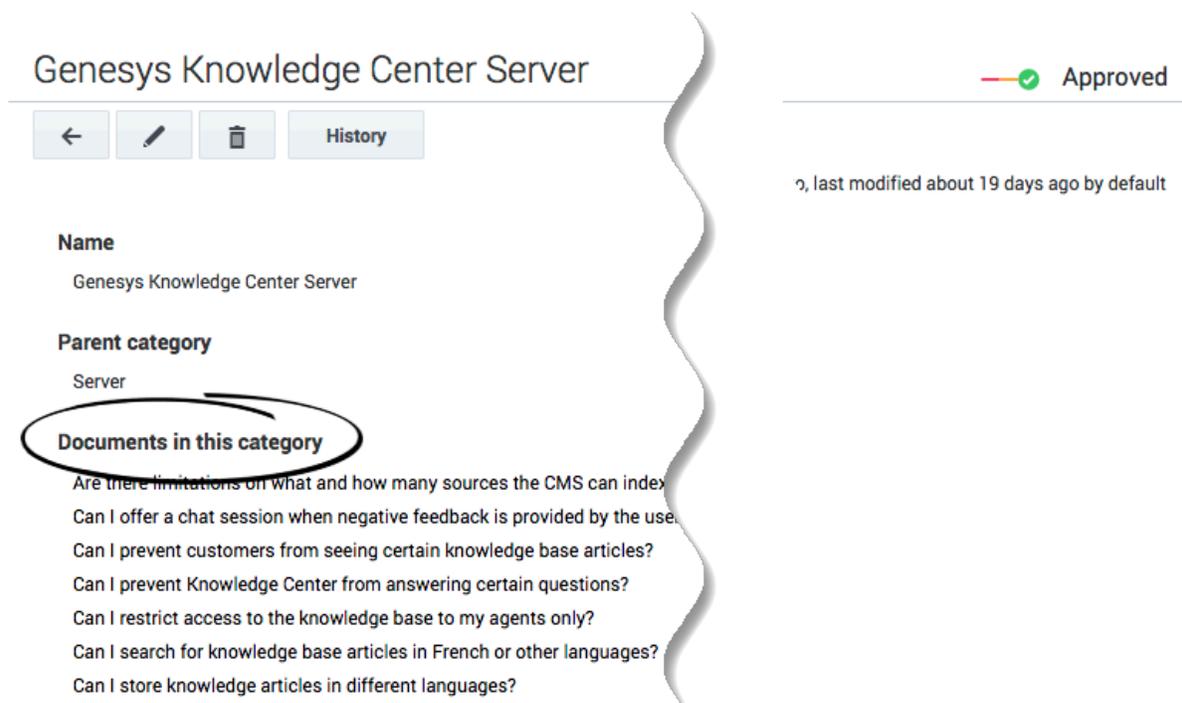


Viewing a category

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



The category will look something like this:



The screenshot displays the 'Genesys Knowledge Center Server' interface. At the top, the title 'Genesys Knowledge Center Server' is shown. Below the title are four buttons: a back arrow, an edit pencil, a trash can, and a 'History' button. The 'Name' field contains 'Genesys Knowledge Center Server'. The 'Parent category' field contains 'Server'. The 'Documents in this category' section is circled in black and contains a list of document titles. To the right of the main content, there is a status indicator 'Approved' with a green checkmark and a red line, and a note 'last modified about 19 days ago by default'.

Genesys Knowledge Center Server

← ✎ 🗑️ History

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?

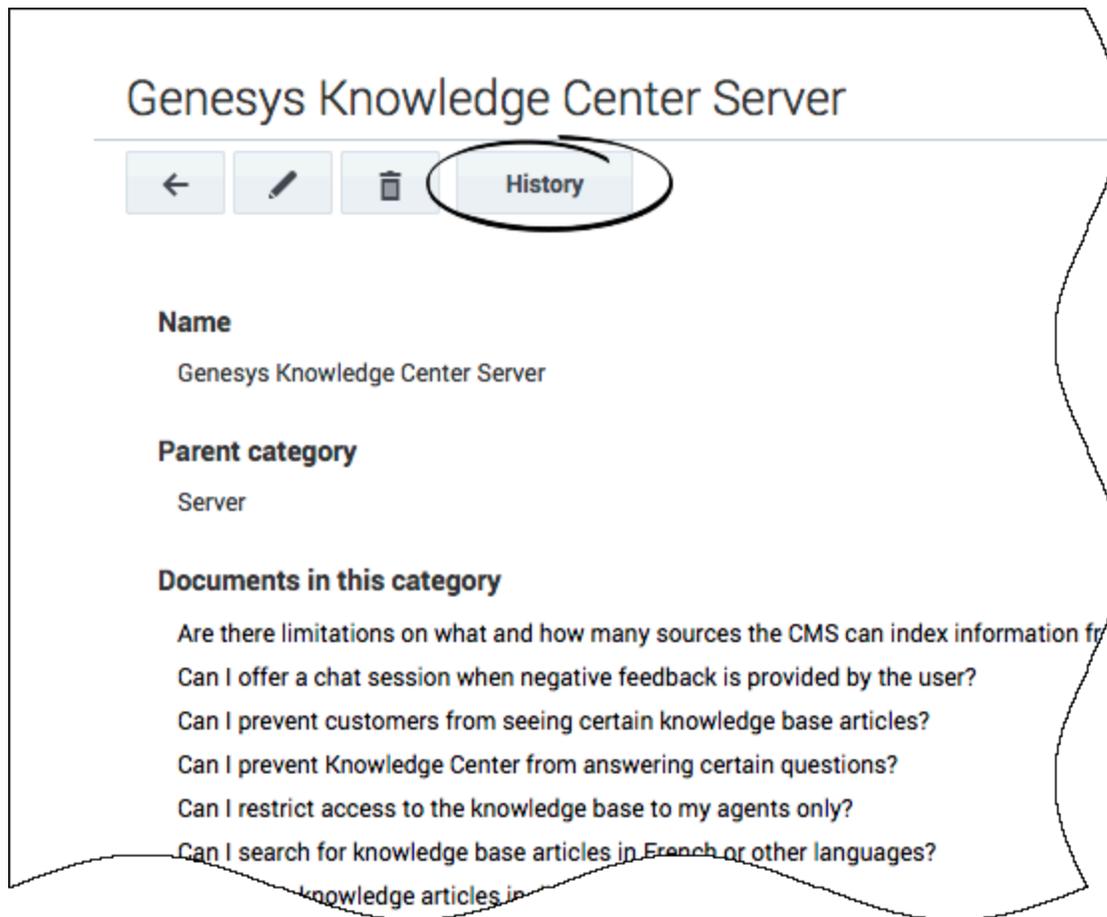
Approved

last modified about 19 days ago by default

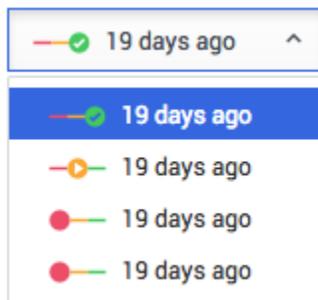
In addition to its properties, you can see a list of the documents that belong to the category. Click a document's name to open it.

Category history

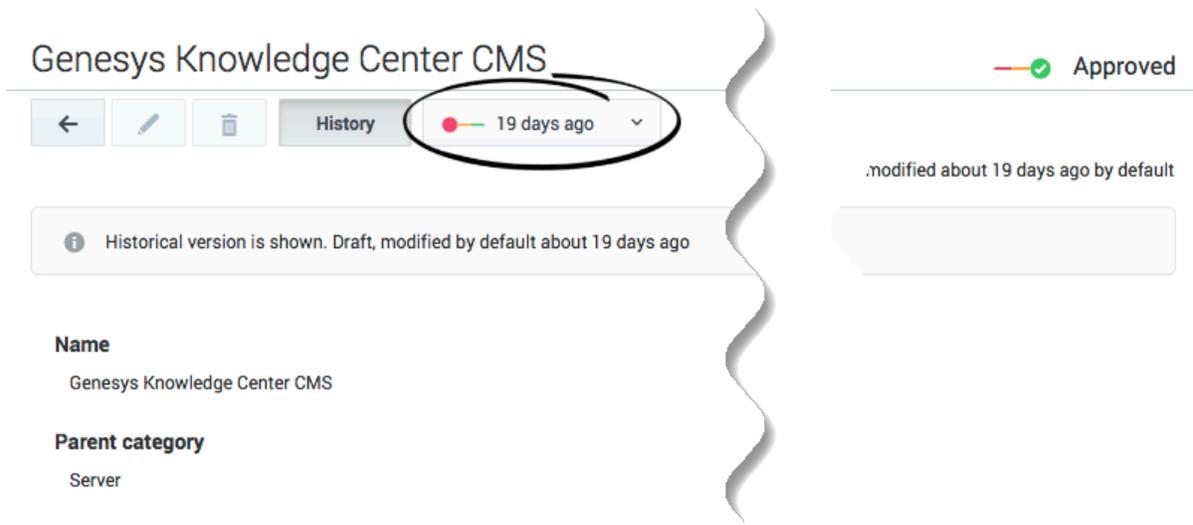
While you are viewing a category, you can click the **History** button:



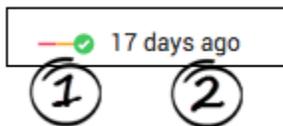
This displays all of the versions of the category:



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



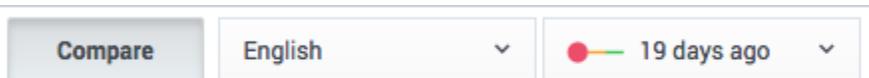
Each line in the history drop-down shows the following information about the version:



- 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**:

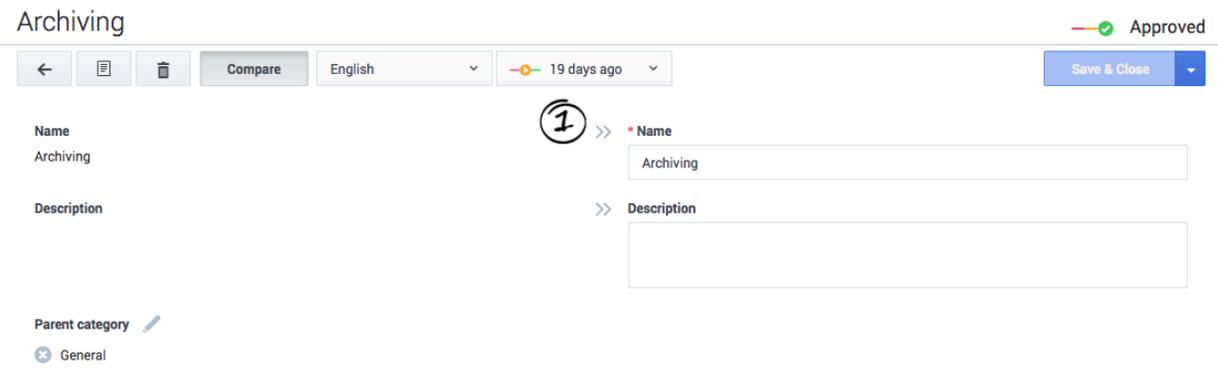


Select the desired language and version from the drop-down lists that appear.

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:



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

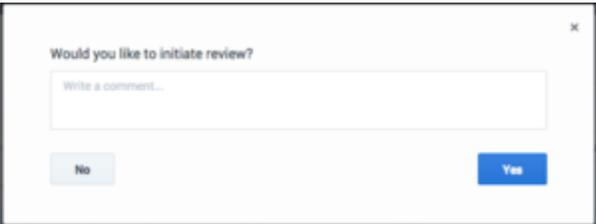
Approval workflow

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

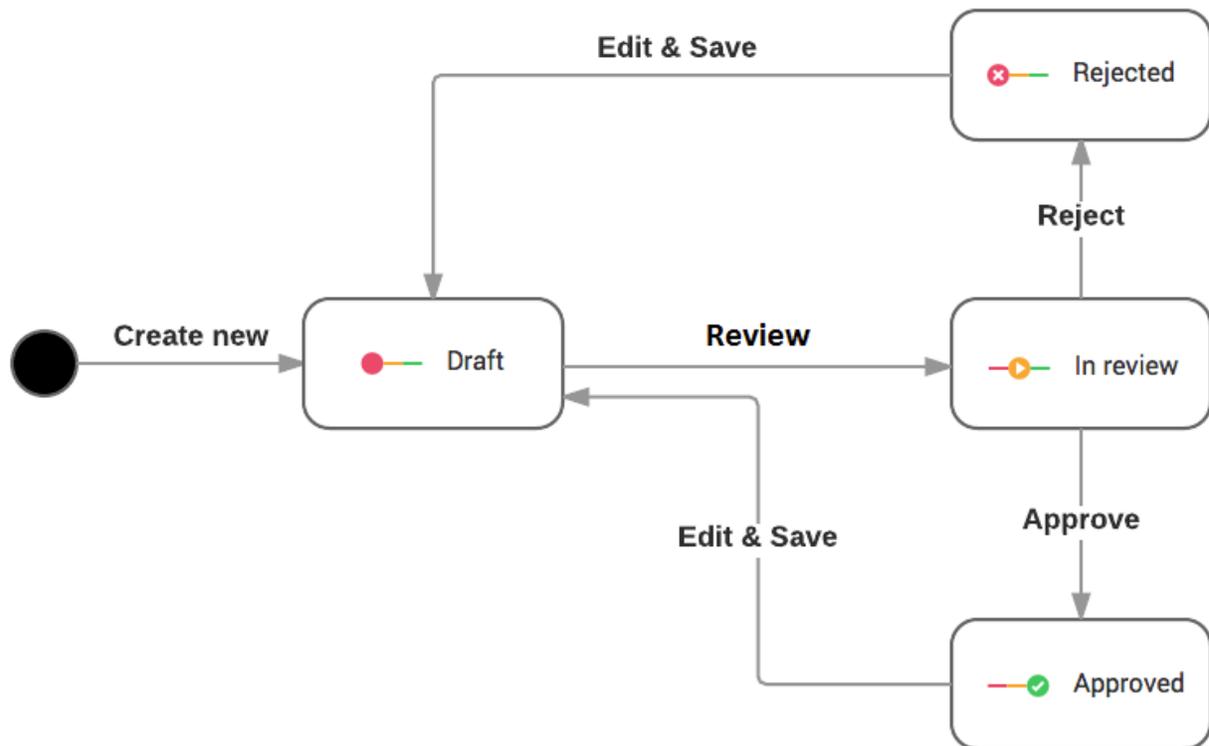
	Draft —authoring is in progress.
	In Review —the category is ready for approval review.
	Approved —the category is ready to be published to the server so it can be used by Knowledge Center.
	Rejected —the category has been reviewed and rejected—it requires further editing before it can be resubmitted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

Let's look at an example of this workflow:

	When you create a new category or document, it has a status of Draft . You can edit and save it multiple times while it is still in Draft status.
--	--

	<p>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.</p> <p>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.</p>
 In review	<p>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.</p> <p>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.</p>
 Approved	<p>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.</p> <p>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.</p>
 Rejected	<p>Rejected categories or documents have a status of Rejected. They must to be corrected and then resent for review and approval.</p>

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

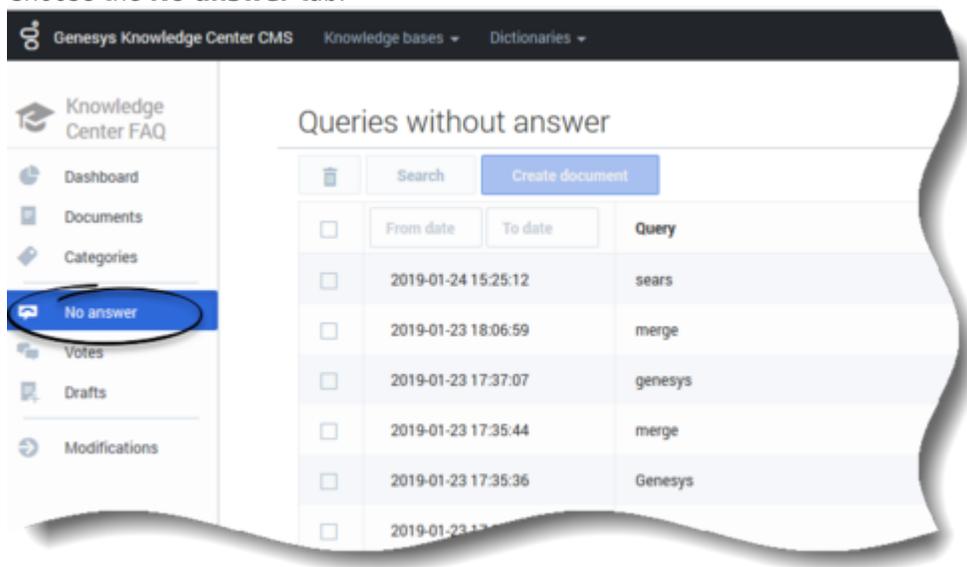
Processing a "No answer" Item

Prerequisites

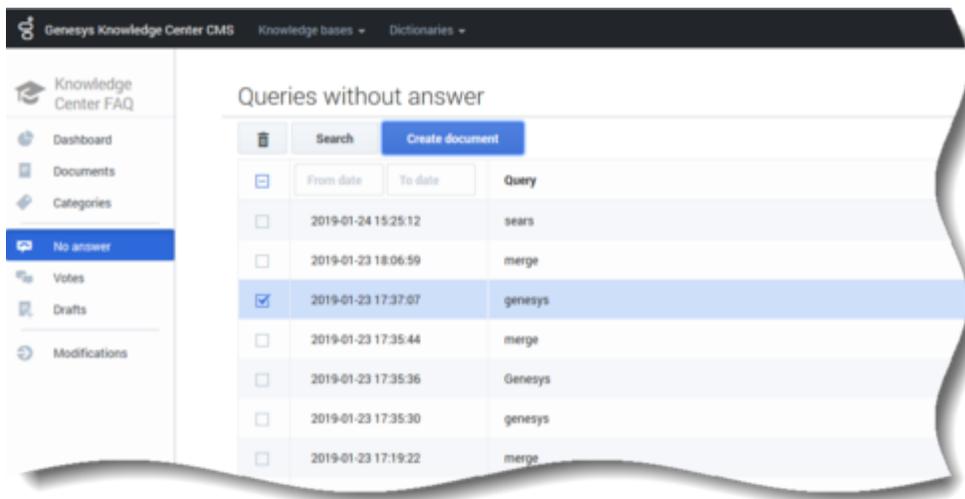
- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.
- **Knowledge.Author** privileges have been assigned to the user.

Start

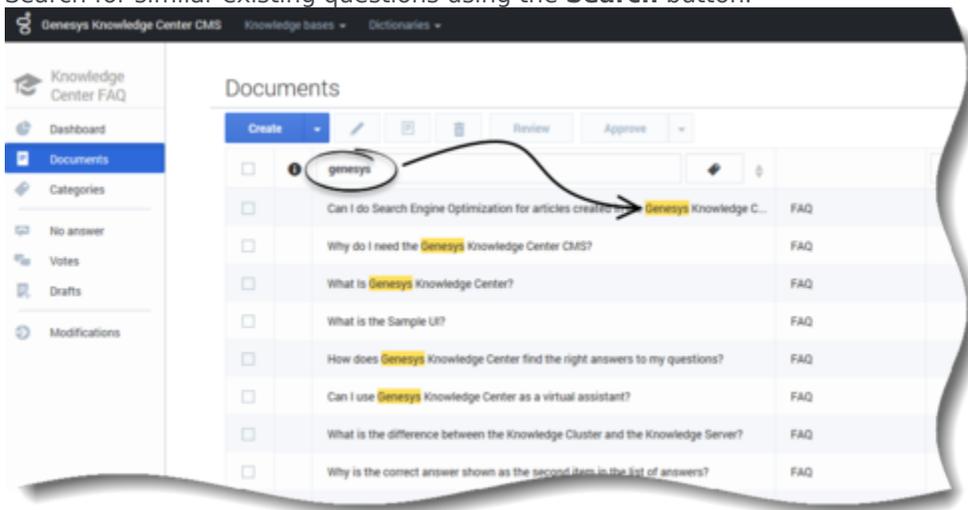
1. Select a knowledge base to display a list of its contents.
2. Choose the **No answer** tab.



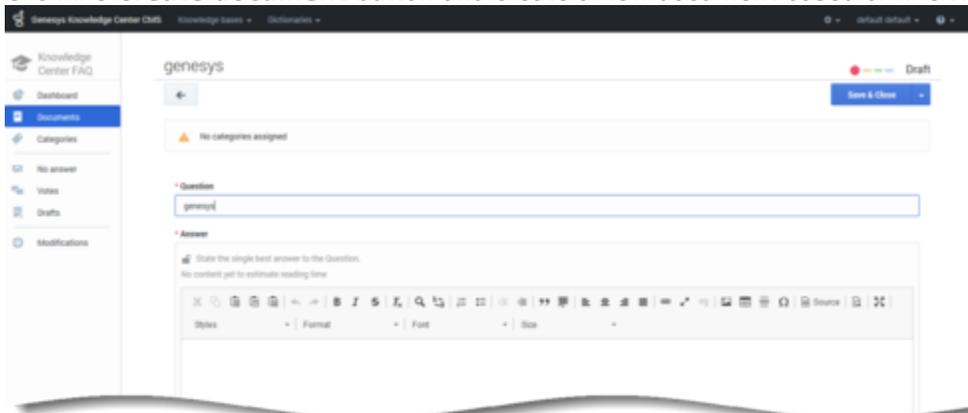
3. Choose one or more items from the list.
4. Process each item:



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



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



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

End

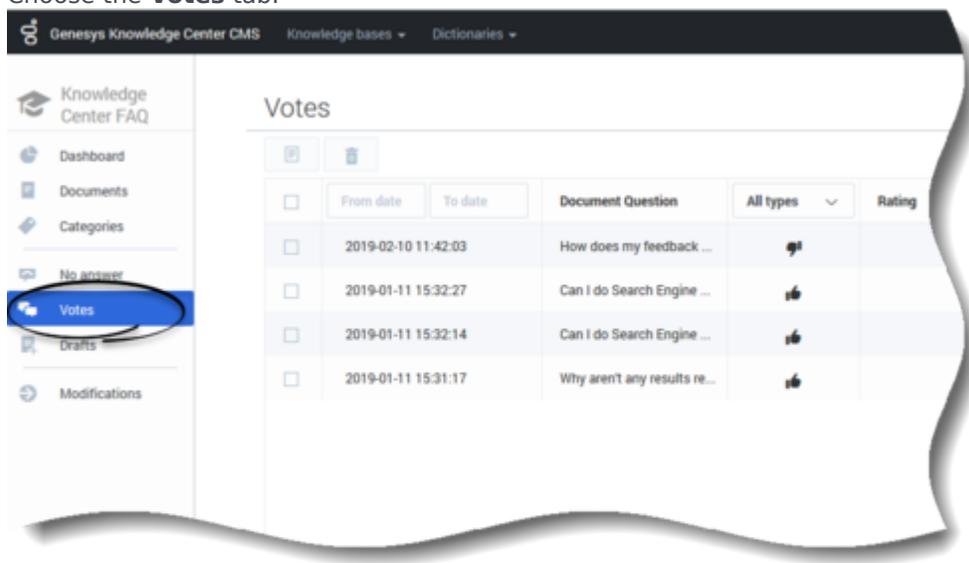
Processing Votes

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.



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

View	From date	To date	Document Question	All types	Rating	Query
<input type="checkbox"/>	2019-02-10 11:42:03		How does my feedback ...	👍		help
<input checked="" type="checkbox"/>	2019-01-11 15:32:27		Can I do Search Engine ...	👍		search data
<input type="checkbox"/>	2019-01-11 15:32:14		Can I do Search Engine ...	👍		search data
<input type="checkbox"/>	2019-01-11 15:31:17		Why aren't any results re...	👍		search data

- Review vote

Is agent feedback treated differently from customer feedback?

Vote

Rating: ★★★★★

Customer comment: Very good search results

Is agent feedback treated differently from customer feedback?

less than a minute of reading / 60 words

Both agent and customer feedback allow Knowledge Center to improve the quality of its responses. However, in most cases, agent feedback is considered more valuable than customer feedback because agents can help create and improve knowledge via the Workspace plugin and the Knowledge Center CMS. Refer to the Knowledge Center User Guide for more information.

Categories (in English)

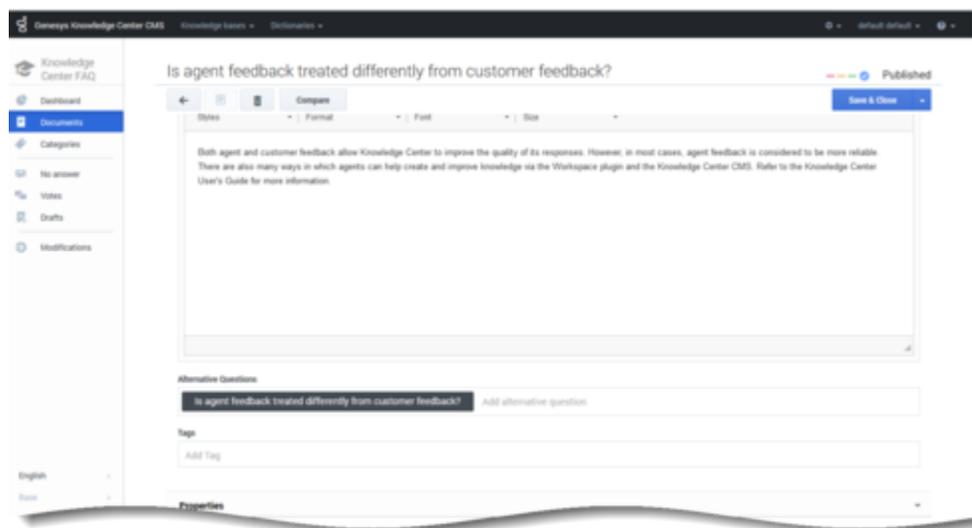
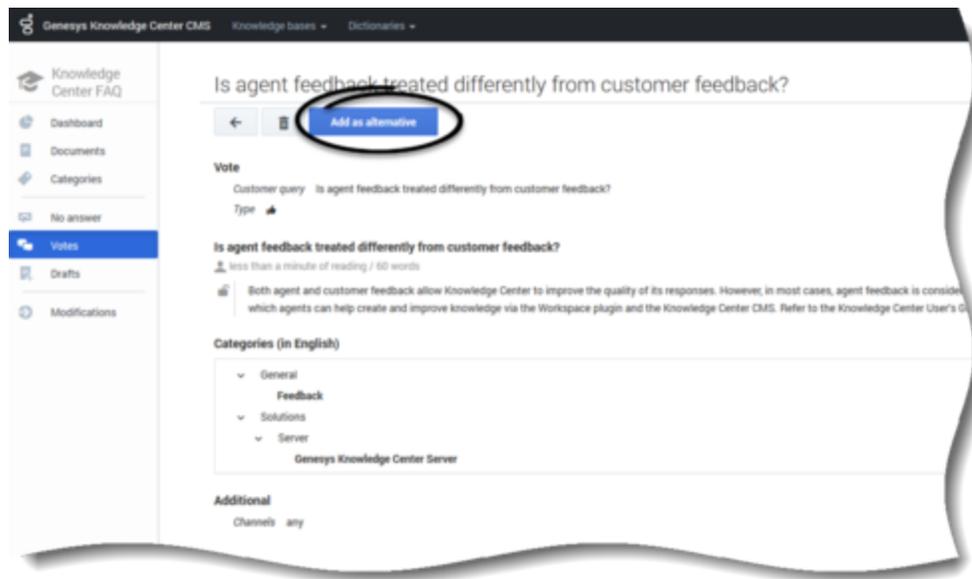
- General
- Feedback
- Solutions
- Server

Genesys Knowledge 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.



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

End

Processing Drafts

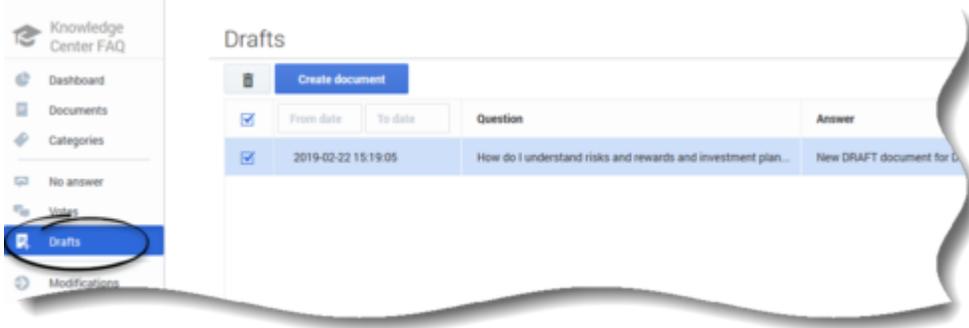
Prerequisites

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

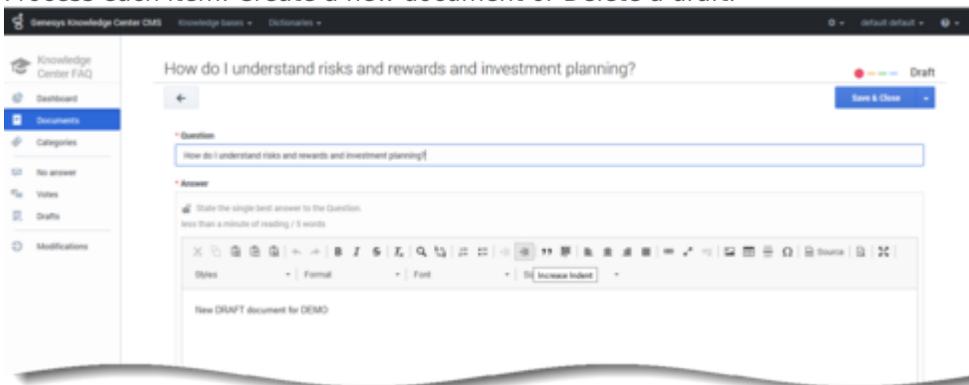
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

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.



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:

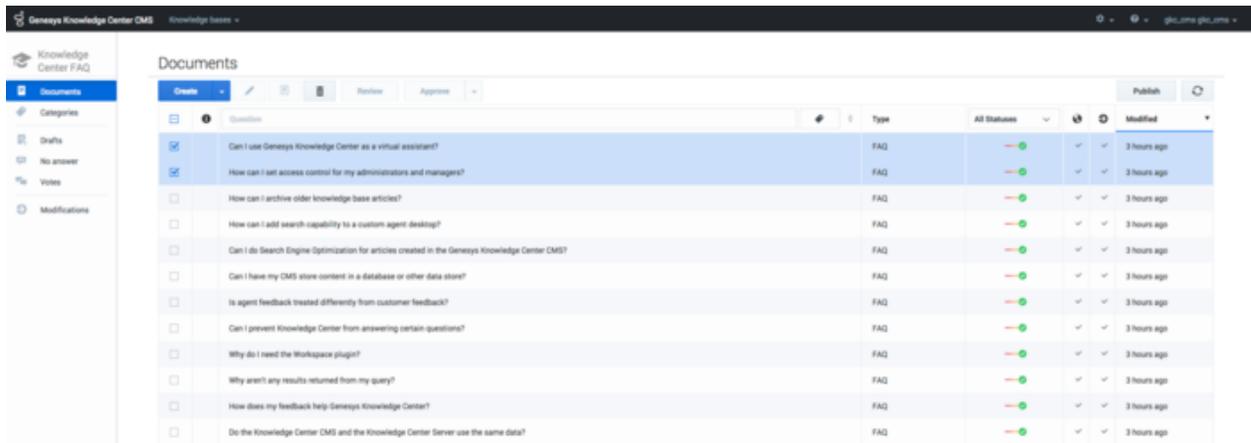
- Only the approved version of the document is published
- If the document has several approved versions, the most recent approved version is selected for publishing
- If the latest approved version of the document has the **Expiration date** defined and that date has passed, the document is not published

Publishing documents

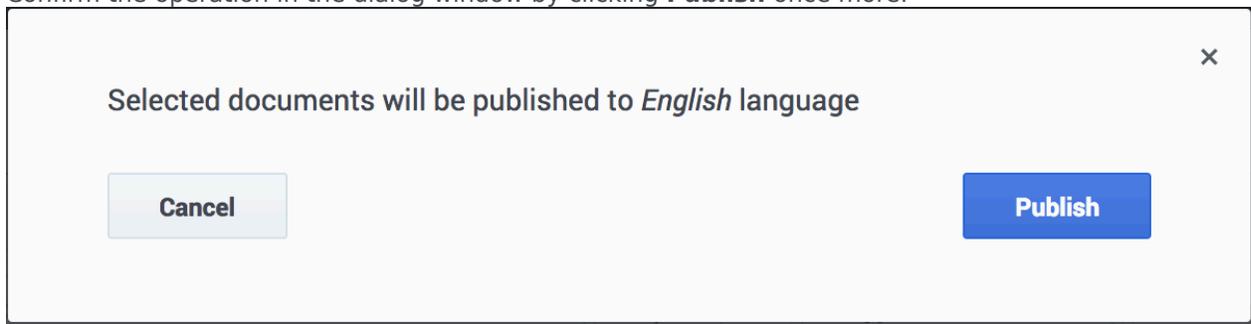
In some cases, you might need to publish only certain select document(s). In this case, you can publish a document from the same location it is being authored.

Publishing from document list

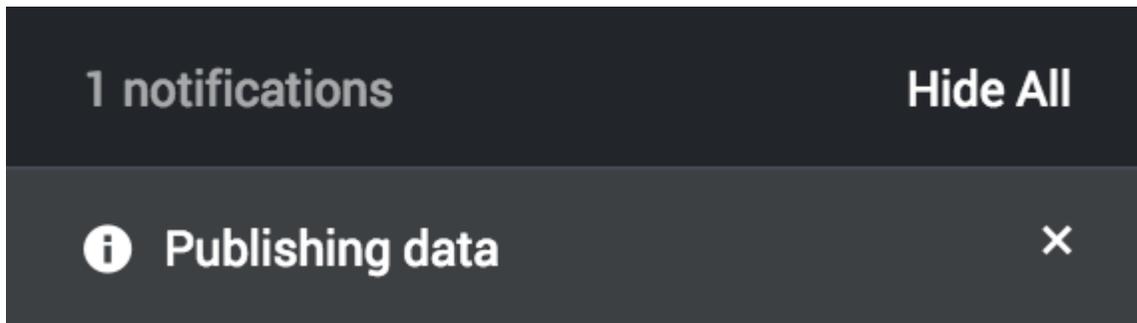
1. From the left-hand sidebar menu, click **Documents**.
2. Select the documents to publish, then click **Publish**.



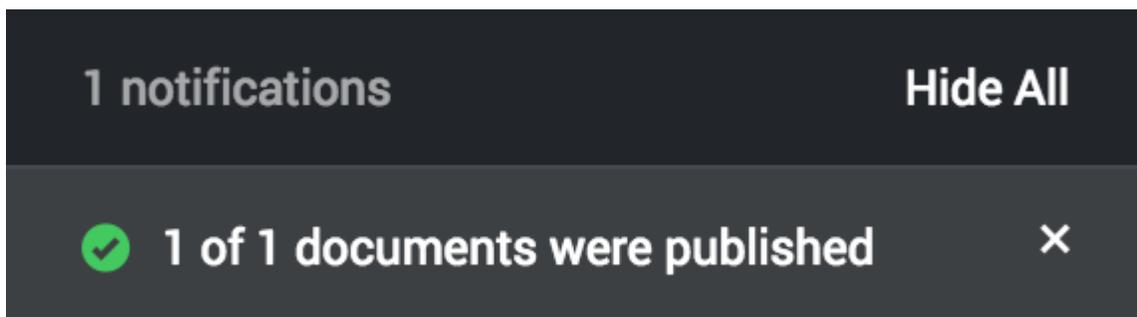
3. Confirm the operation in the dialog window by clicking **Publish** once more.



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

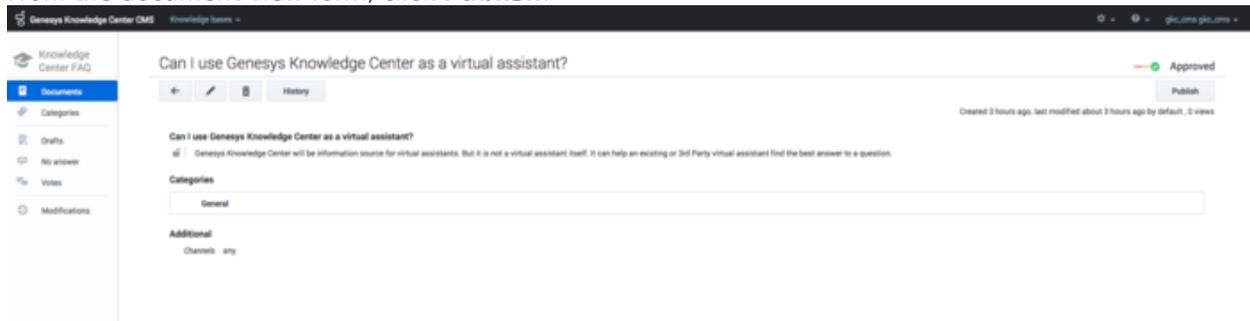


Finally, you will see the notification confirming the document(s) are published:



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**.



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.

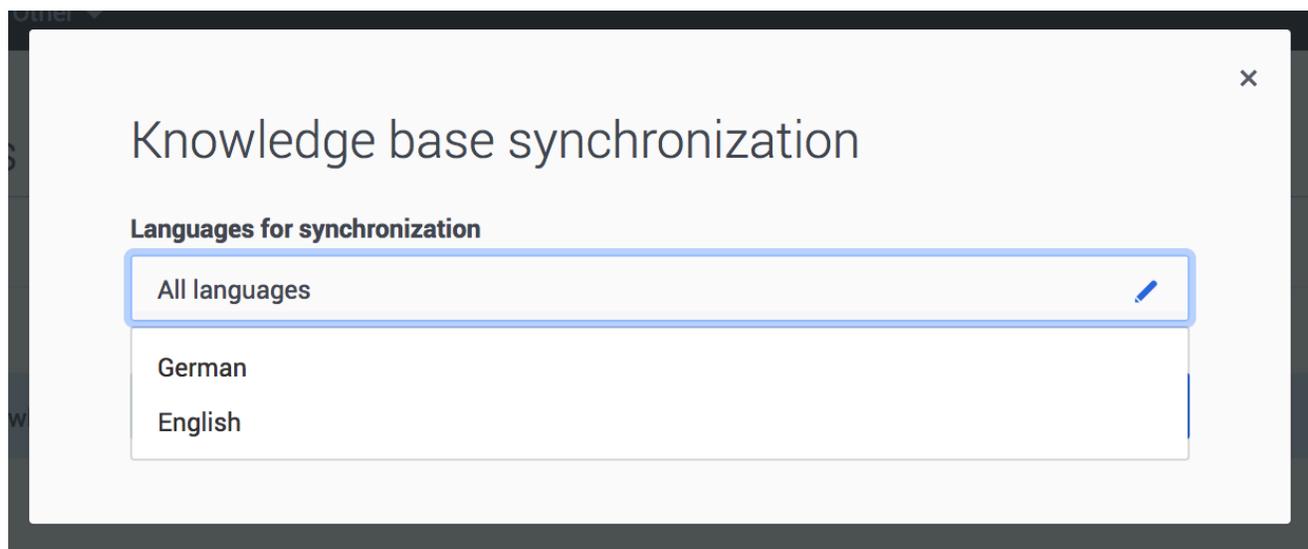
Important

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.

The screenshot shows the 'Modifications' page in the Genesys Knowledge Center CMS. The page displays a table of modifications with columns for Title, Language, Type, and Modified. A 'Synchronize' button is visible in the top right corner of the table area.

Title	Language	Type	Modified
Can I use Genesys Knowledge Center as a virtual assistant?	English	APPROVED	40 seconds ago
How can I set access control for my administrators and managers?	English	APPROVED	3 hours ago
How can I archive older knowledge base articles?	English	APPROVED	3 hours ago
How can I add search capability to a custom agent desktop?	English	APPROVED	3 hours ago
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	English	APPROVED	3 hours ago
Can I have my CMS store content in a database or other data store?	English	APPROVED	3 hours ago
Is agent feedback treated differently from customer feedback?	English	APPROVED	3 hours ago
Can I prevent Knowledge Center from answering certain questions?	English	APPROVED	3 hours ago
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
How does my feedback help Genesys Knowledge 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
How long is information stored in the Historical database?	English	APPROVED	3 hours ago
What reporting data is available in the Pulse plugin?	English	APPROVED	3 hours ago
Does Genesys 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.



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:

- Hourly - define hours and minutes

Scheduling
 Hourly Repeat every 1 hour(s) at 0 minute(es)

- Daily - select time

Scheduling
 Daily Start at 9 : 00 AM

- Weekly - select weekdays and time

Scheduling
 Weekly Days of week Sunday Start at 9 : 00 AM

- Monthly - select day of the month and time

Scheduling
 Monthly Day of month 1 Start at 9 : 00 AM

- Once a year - select month, day of the month and time

Scheduling
 Once a year Month January Day 1 Start at 9 : 00 AM

Synchronized Content

Attachment synchronization

Synchronization

Attachments synchronization

Disabled

Disabled

Only URL

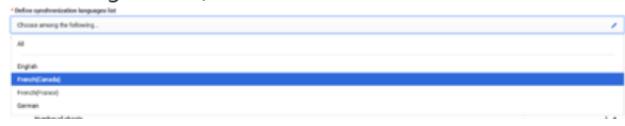
URL and content

- 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.

Important

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

<p>Languages for synchronization: all</p>	<p>(Default) Synchronization enabled for all languages within the knowledge base</p>
<p>Languages for synchronization: selected</p>	<p>Languages that need to be synchronized (needs to be selected from the list of supported languages by knowledge base):</p>  <p><i>click to enlarge</i></p>

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:

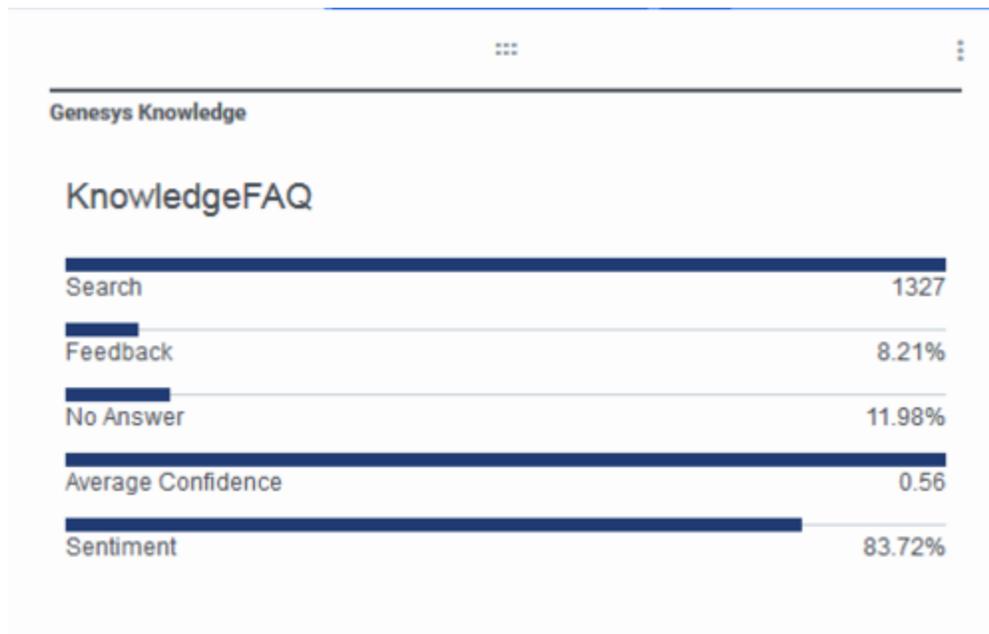
- **Dashboard:** containing a set of pre-configured statistics that are embedded into the main pulse dashboards along with other measures of your environment.
- **Expanded:** Kibana-based widget that allows dynamic data discovery when you expand the widget.

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



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

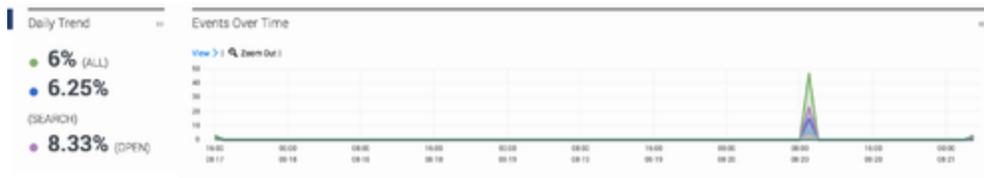
The goal of the Analytics Widget, intended for use by supervisors and content managers, is to help you visualize how data is used in the enterprise by focusing on the most frequently used content and questions that fail to yield an answer. This widget can also be used to analyze data within a particular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



Analytics Widget Dashboard

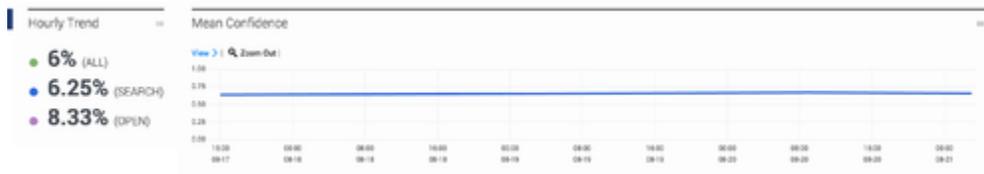
Let's see what each part of the dashboard means:

- 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.



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.



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.

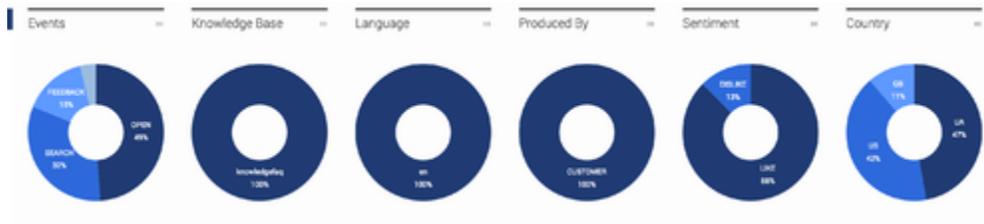


Analytics Widget Geography Panel

- 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



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



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

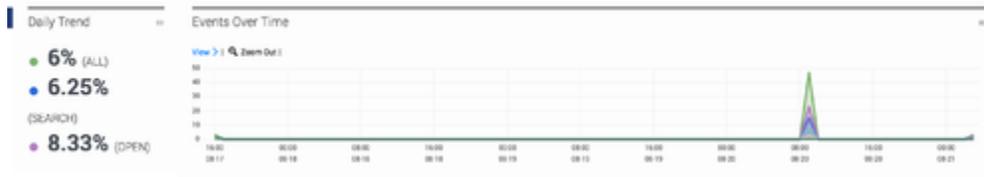
The Performance Widget, intended for use by administrators, focuses on the mean processing times for user requests based on their distribution between servers, knowledge bases, and location.



Analytics Widget Timeline

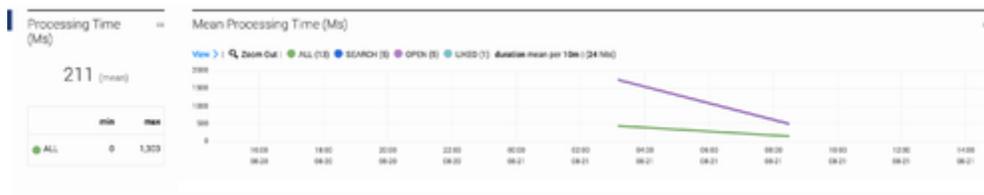
Let's take a look at each part of the dashboard:

- 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.



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.



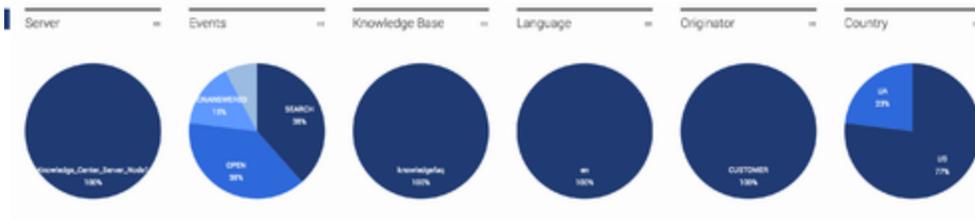
Performance Widget Time Processing Panel

- 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.



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:

The expanded widget shows a table of event details with the following columns: type, query query, timestamp, eventid, and knowledgeid. The table contains 13 rows of data.

type	query query	timestamp	eventid	knowledgeid
SEARCH	plugin	2015-08-21 15:31:50		knowledgefaq
OPEN		2015-08-21 15:31:47		knowledgefaq
NONANSWERED		2015-08-21 15:31:44		knowledgefaq
SEARCH	Do the Knowledge Center CMS and the Knowledge Center Server...	2015-08-21 15:31:44		knowledgefaq
NONANSWERED		2015-08-21 15:31:39		knowledgefaq
SEARCH	test	2015-08-21 15:31:39		knowledgefaq
FEEDBACK	How can I assign Genesys Knowledge Center Plugins to my agen...	2015-08-21 15:31:35		knowledgefaq
OPEN		2015-08-21 15:31:34		knowledgefaq
SEARCH	How can I assign Genesys Knowledge Center Plugins to my agen...	2015-08-21 15:31:32		knowledgefaq
OPEN		2015-08-21 15:31:26		knowledgefaq

Expand Performance Widget to see Details

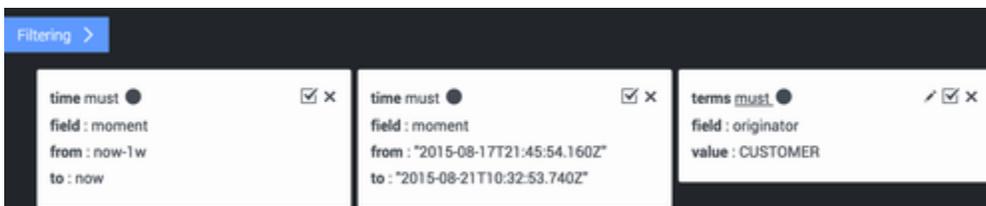
Widget Time Frame Display

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



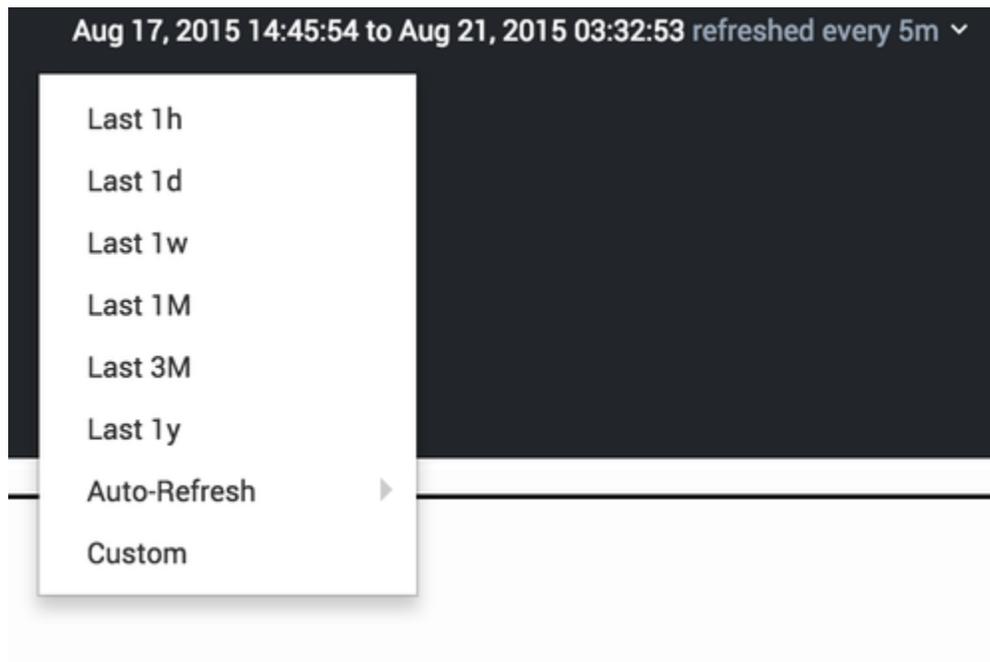
Panel Above Dashboard

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



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