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# Genesys Knowledge Center User's Guide

Working with Content

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# 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

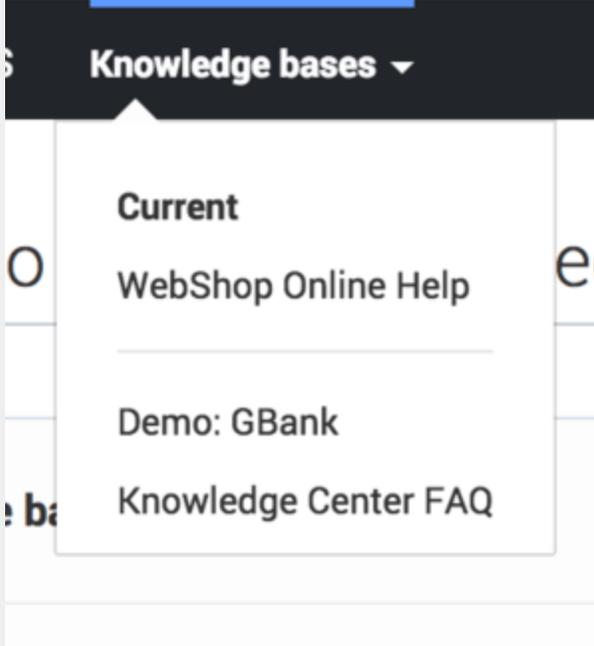
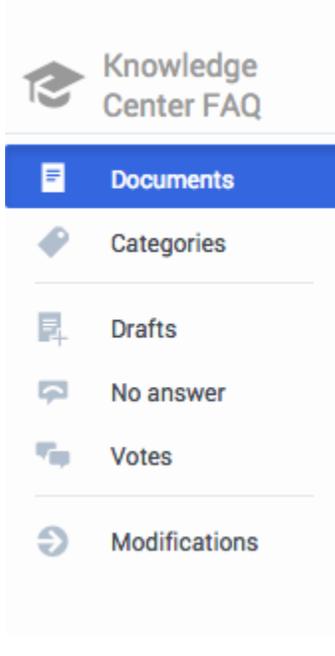
### Important

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

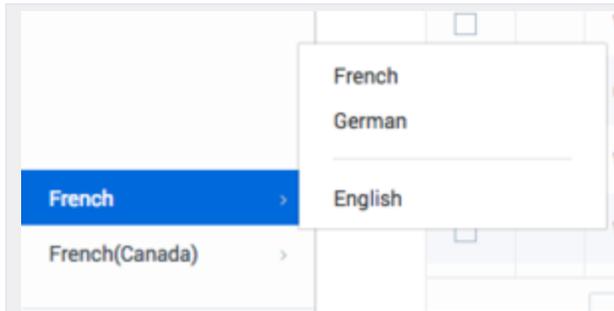
- Knowledge.CMS.Category.Author
- Knowledge.CMS.Document.Author

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

## The authoring area

	<p>To open the authoring area, click the <b>Knowledge bases</b> menu in the main menu of the application.</p> <p>This displays the current knowledge base (just below the <b>Current</b> 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"><li>• Authoring<ul style="list-style-type: none"><li>• Documents—the documents in the knowledge base</li><li>• Categories—knowledge base categories</li></ul></li><li>• Feedback<ul style="list-style-type: none"><li>• Drafts—draft documents submitted by agents (using Workspace)</li><li>• No answer—queries for which no relevant results were found</li><li>• Votes—relevancy and 5-star ratings submitted by agents and consumers</li></ul></li><li>• Synchronization status<ul style="list-style-type: none"><li>• Modifications—a list of the knowledge base modifications that are waiting to be synchronized</li></ul></li></ul>

## 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:**

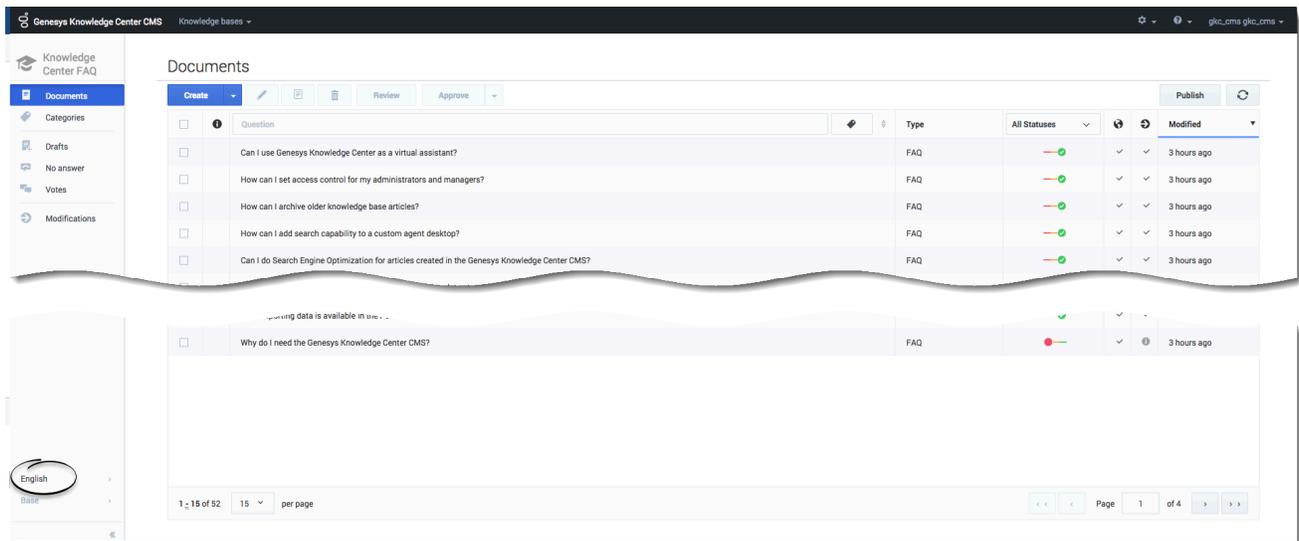
- Selecting the base language allows you to define content that will be re-used in all regional versions
- You must create a new document or category in the base language before you create a regional version.

## Working with documents

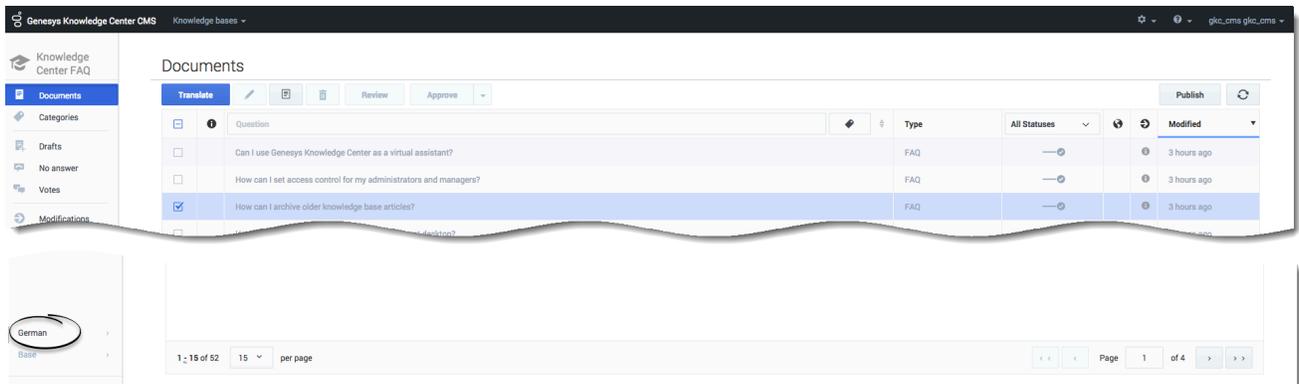
### Displaying documents

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

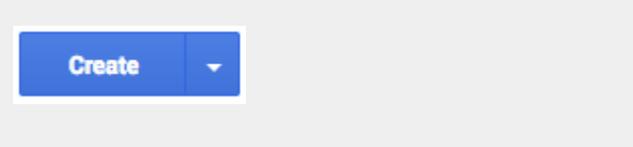
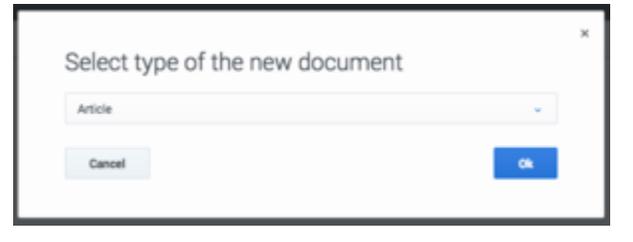
## Working with Content

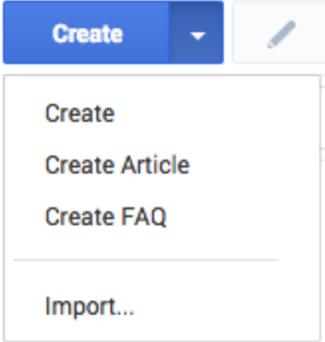
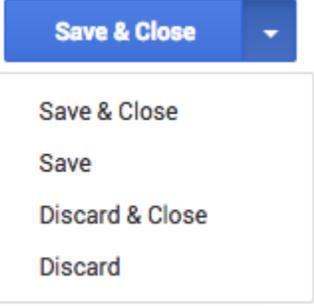


If you select any other language, you can translate an existing document or category into the selected language:



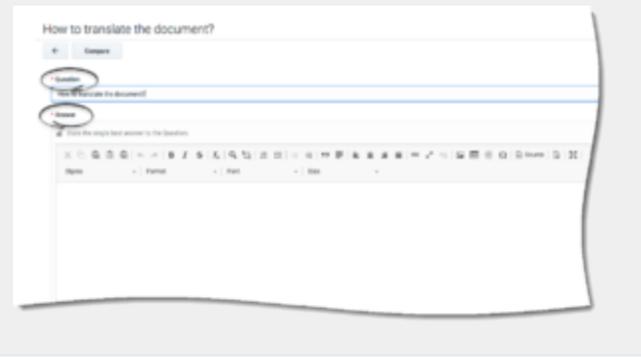
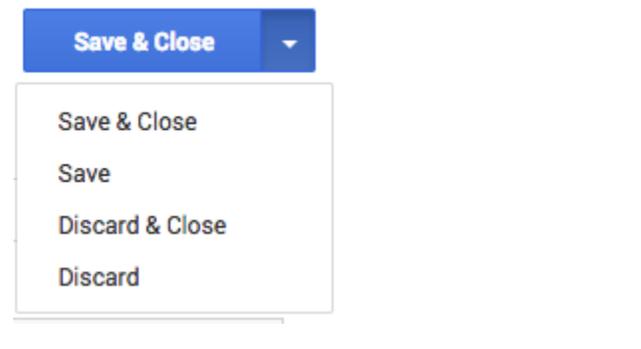
## Creating a document

	<p>Click <b>Create</b>.</p> <p><b>Note:</b> You can only create documents in the default language. Use other languages to <b>translate</b> 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>Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.</p>
	<p>Click <b>Save &amp; Close</b> or select one of the other options in the Save &amp; Close button's drop-down menu.</p>

## Translating a document

	<p>Select a document to translate to the current language.</p>
	<p>Click <b>Translate</b>.</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 <b>Save &amp; Close</b> or select one of the other options in the Save &amp; 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:

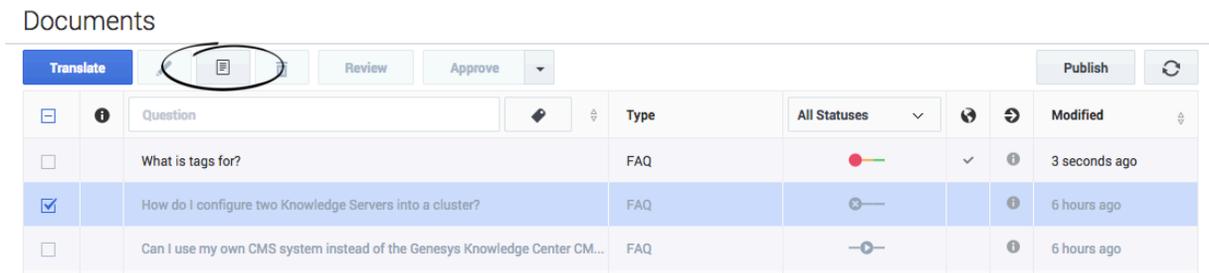
- **Frequently asked questions (FAQ)**—A list of questions and answers, all of which can be commonly asked in a specific context and which pertain to a particular topic. This format is often used on mailing lists and in other online forums, where common questions tend to be asked repeatedly.
- **Article**—An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

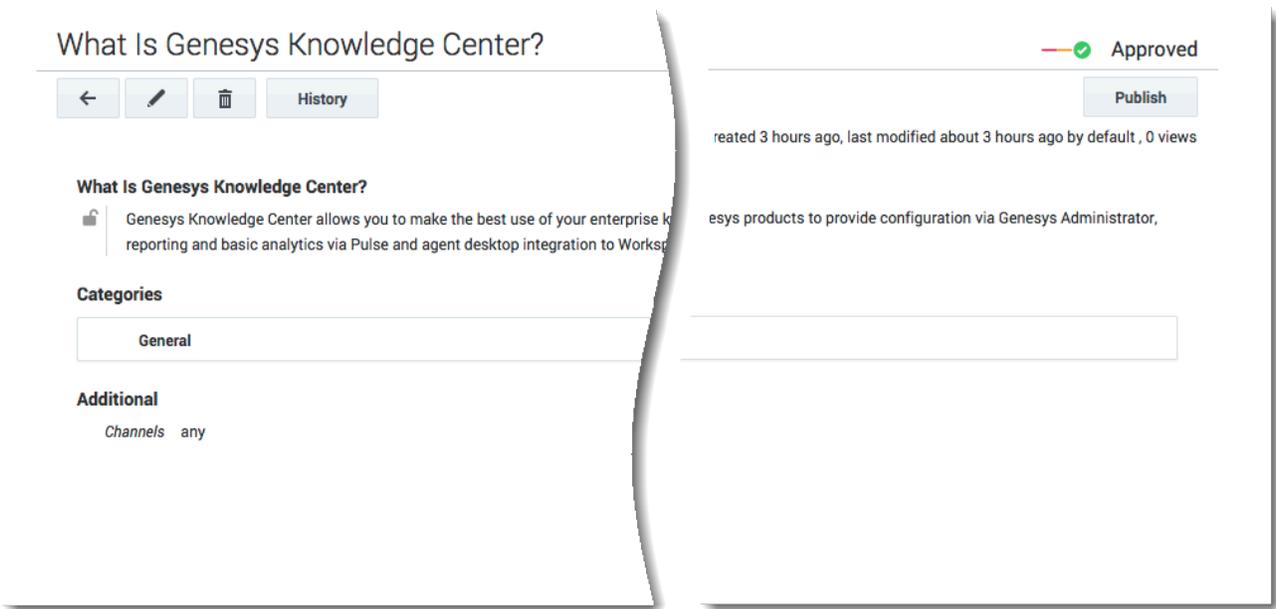
	FAQ	Article
Document name	Question	Title
Short Summary (plain text)		Summary
Document content (formatted text)	Answer	Description
Alternative names	Alternative Questions	Alternative Titles

### 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**:



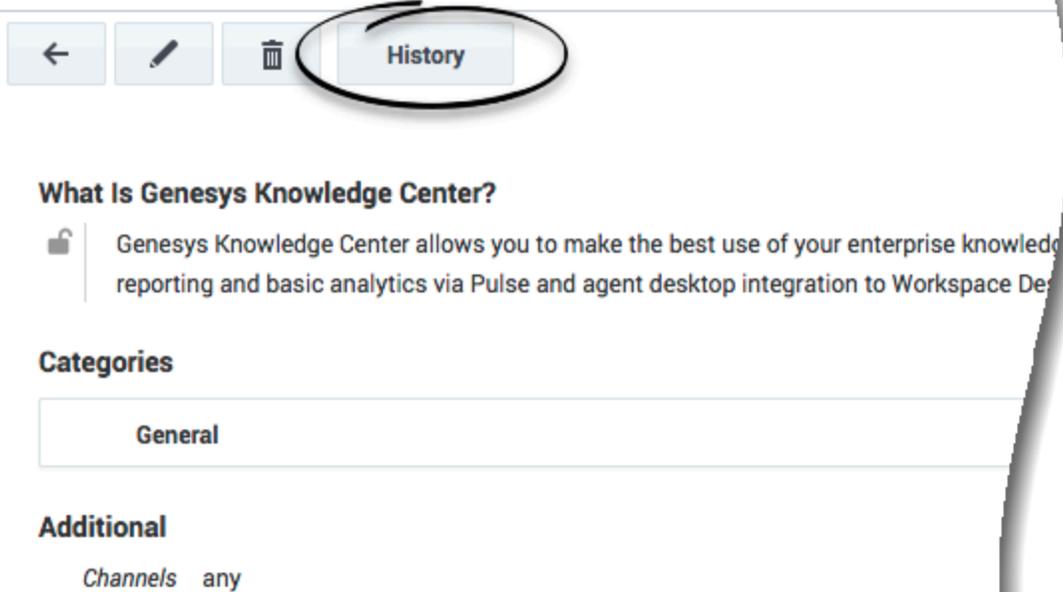
The document will look something like this:



### Document history

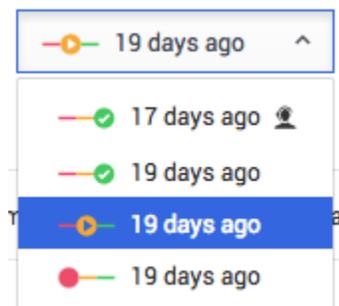
While you are viewing a document content, you can click the **History** button:

## 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, a trash can, and a button labeled "History". The "History" button is circled in black. Below the toolbar, the document content is visible, including a sub-header "What Is Genesys Knowledge Center?", a paragraph of text, a "Categories" section with a "General" tag, and an "Additional" section with "Channels any".

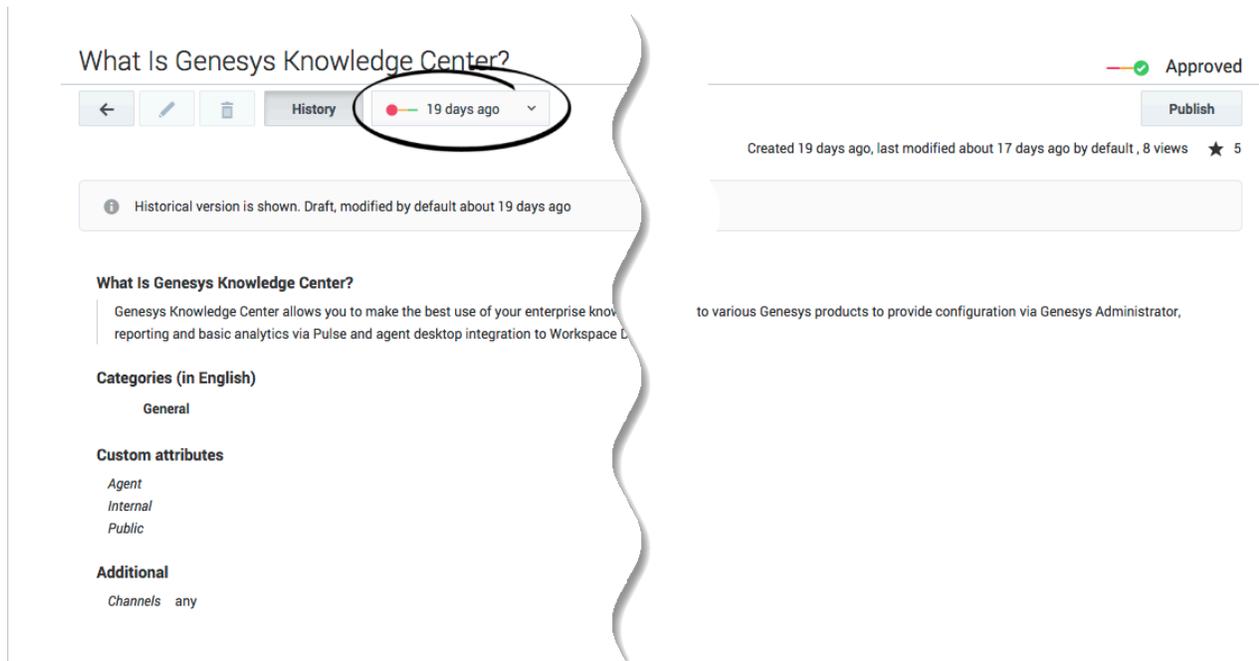
This displays all of the versions of the document:



The screenshot shows a list of document versions. Each entry includes a colored circle icon, a timestamp, and an upward arrow. The versions are:

- 19 days ago (with a blue circle icon)
- 17 days ago (with a green circle icon and a user icon)
- 19 days ago (with a green circle icon)
- 19 days ago (with a blue circle icon, highlighted)
- 19 days ago (with a red circle icon)

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



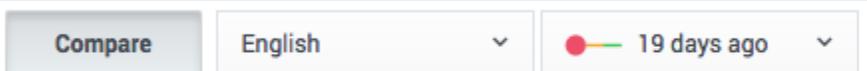
Each line in the history drop-down shows the following information about the version:



- **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:

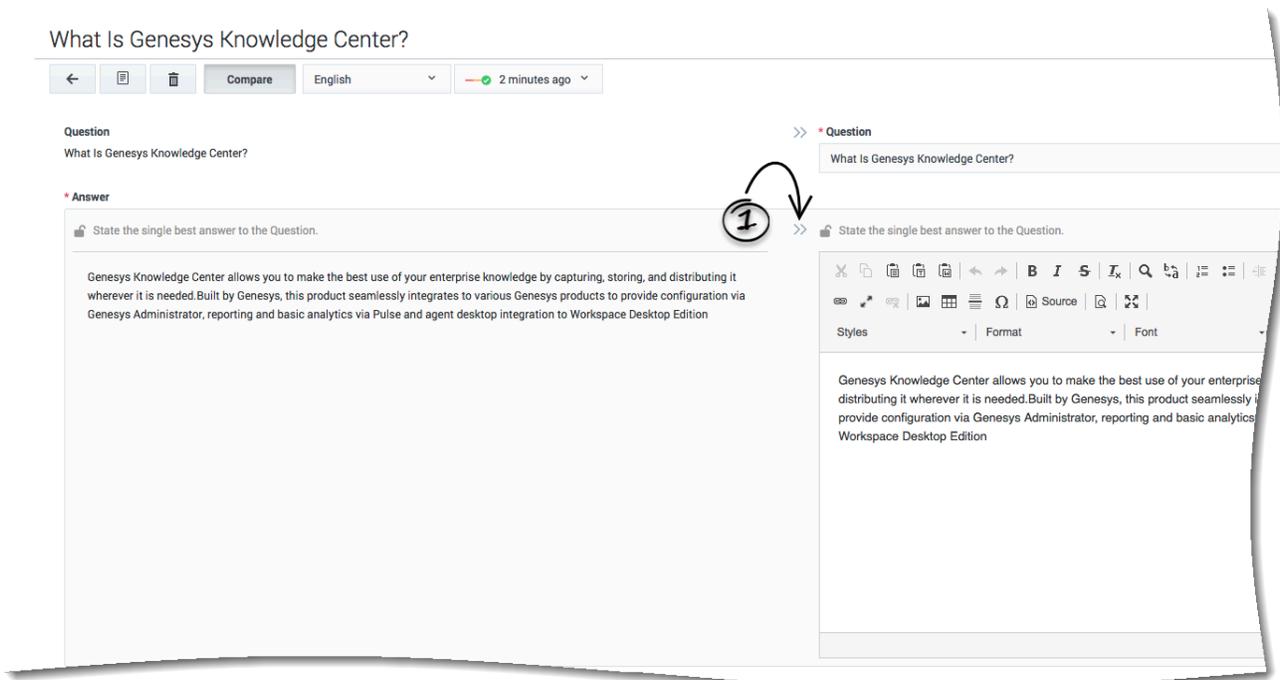
- Compare the current version with a previous version

## Working with Content

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- 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:

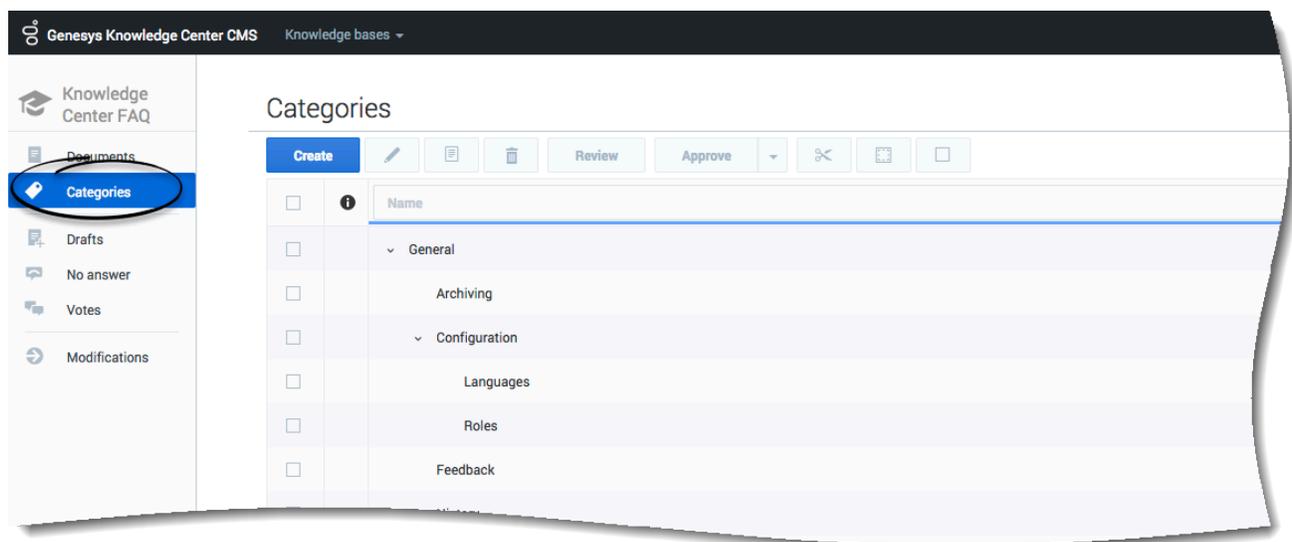


Click the Copy button (**1**) near a field to copy its value from the older version to the current one.

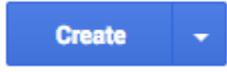
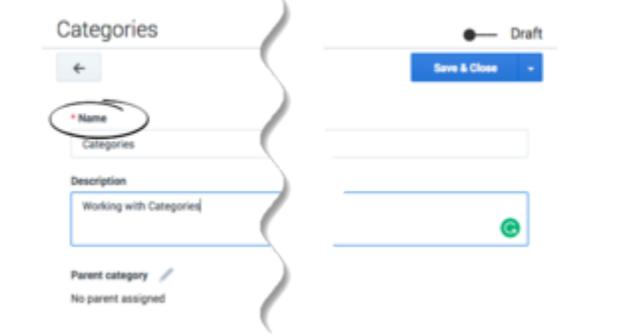
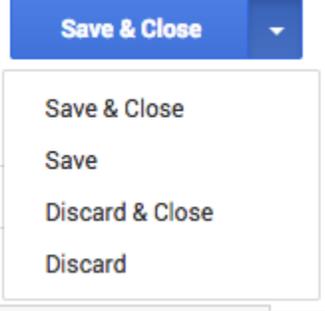
## Working with Categories

### Displaying categories

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



### Creating a category

	<p>Click <b>Create</b>.</p> <p><b>Note:</b> If you select a category from the category list before clicking <b>Create</b>, 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 <b>Save &amp; Close</b> or select one of the other options in the Save &amp; Close button's drop-down menu.</p>

## Category errors

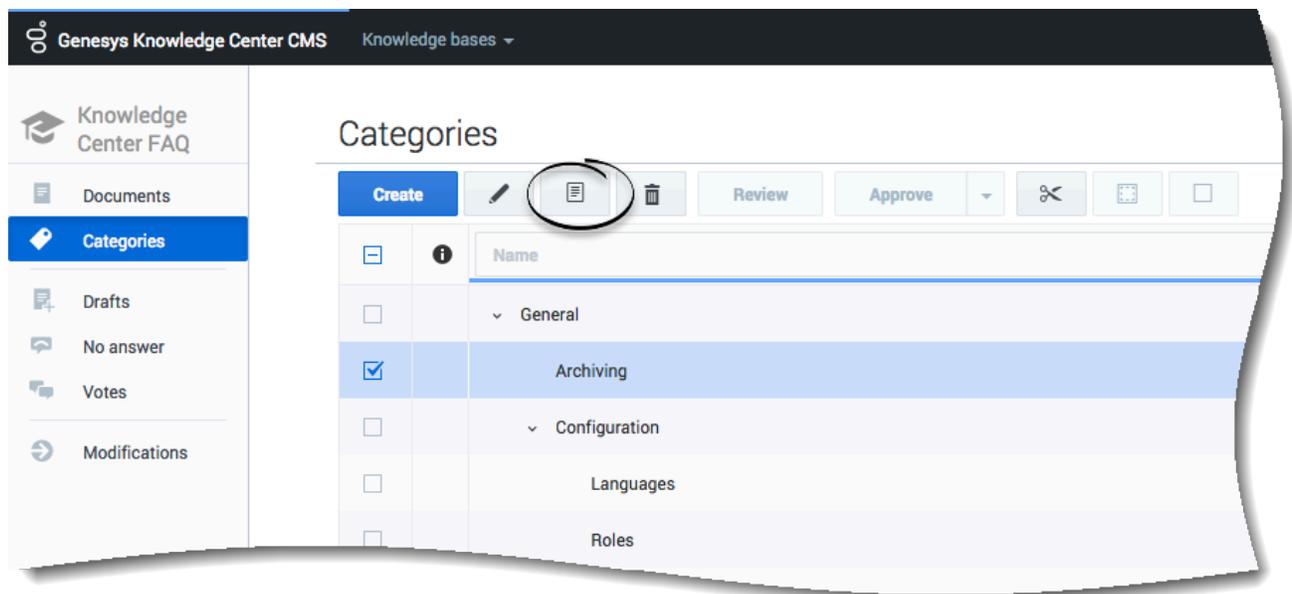
When you save a category, the Knowledge Center CMS validates the values you have entered into its fields. It highlights any fields that contain errors by:

- 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:

## Genesys Knowledge Center Server



 Approved

👤, last modified about 19 days ago by default

### Name

Genesys Knowledge Center Server

### Parent category

Server

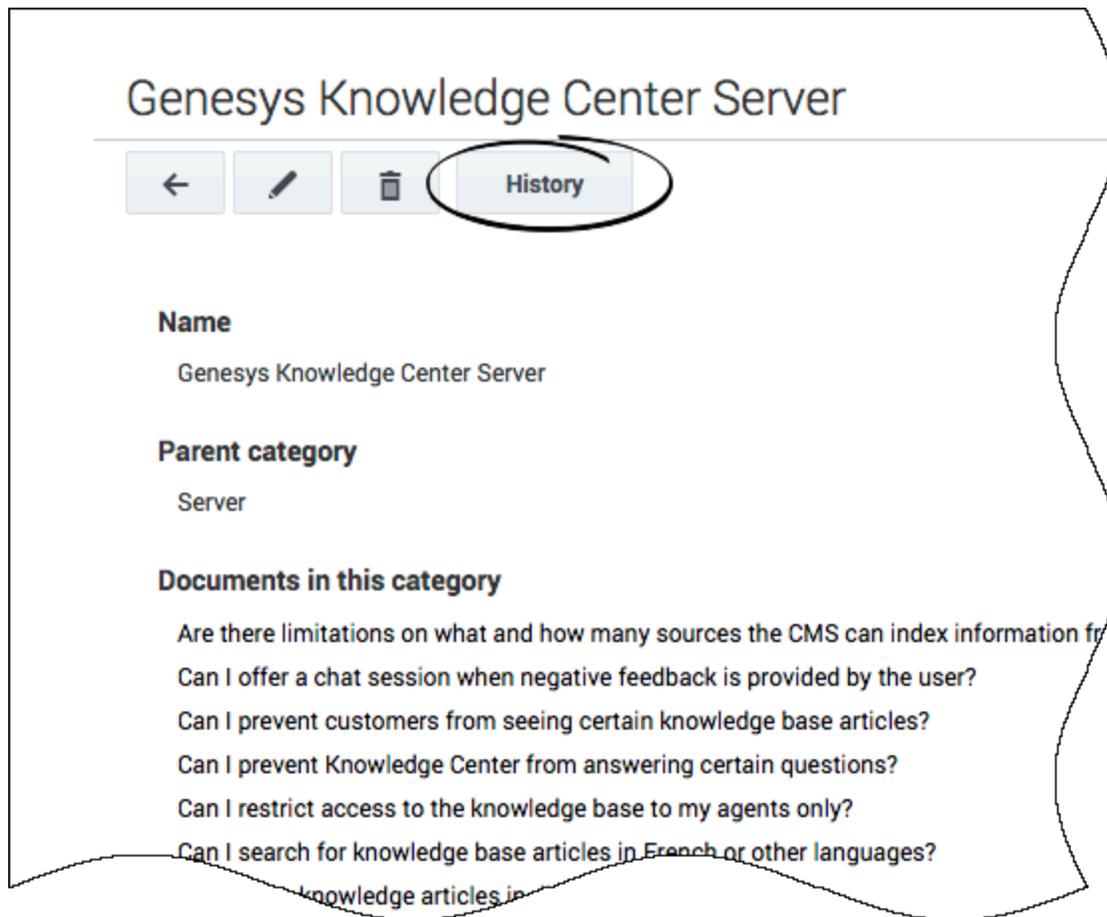
### Documents in this category

- Are there limitations on what and how many sources the CMS can index
- Can I offer a chat session when negative feedback is provided by the user?
- Can I prevent customers from seeing certain knowledge base articles?
- Can I prevent Knowledge Center from answering certain questions?
- Can I restrict access to the knowledge base to my agents only?
- Can I search for knowledge base articles in French or other languages?
- Can I store knowledge articles in different languages?

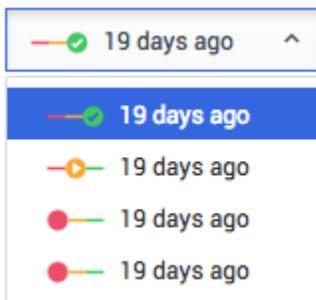
In addition to its properties, you can see a list of the documents that belong to the category. Click a document's name to open it.

## Category history

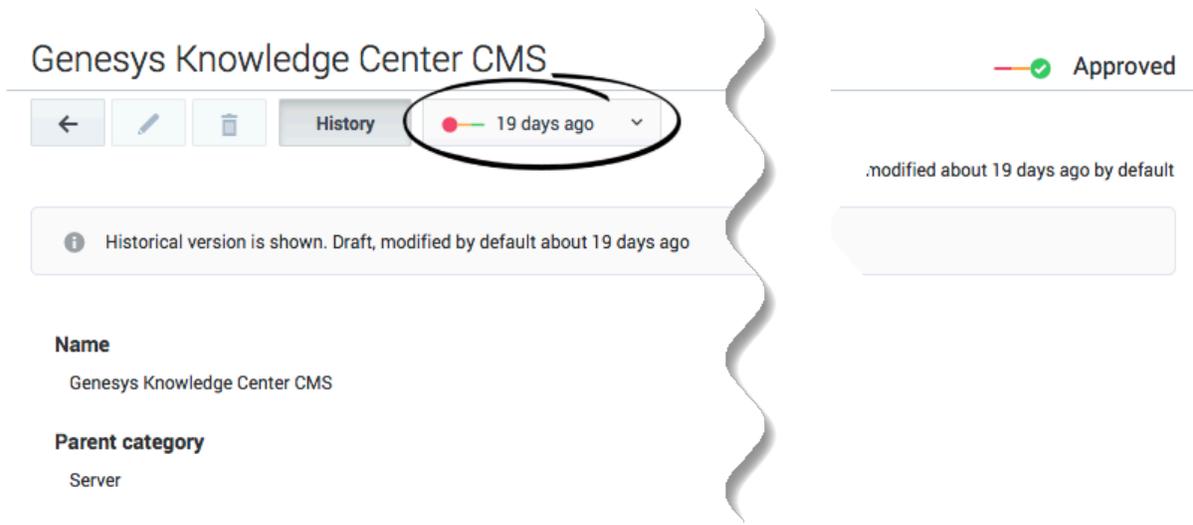
While you are viewing a category, you can click the **History** button:



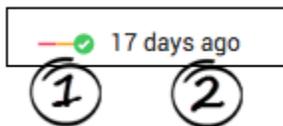
This displays all of the versions of the category:



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



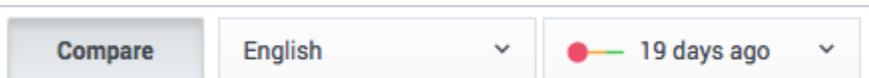
Each line in the history drop-down shows the following information about the version:



- 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**:

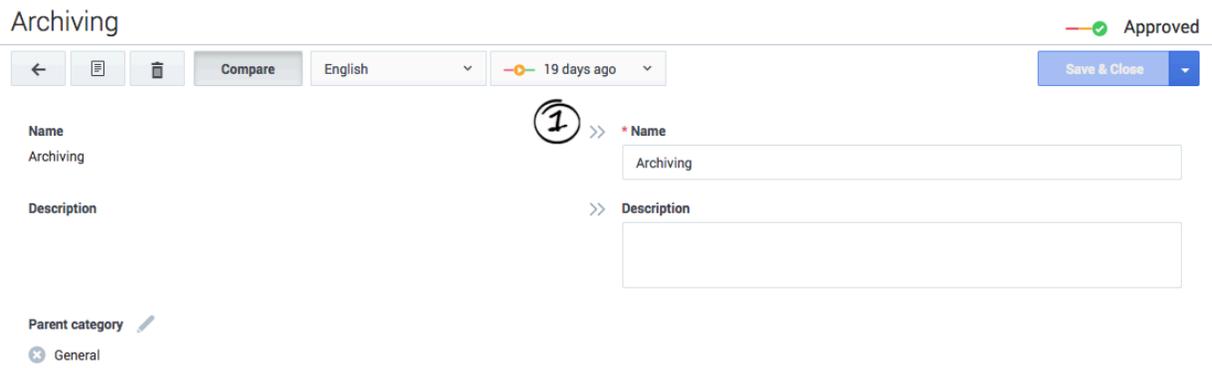


Select the desired language and version from the drop-down lists that appear.

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:

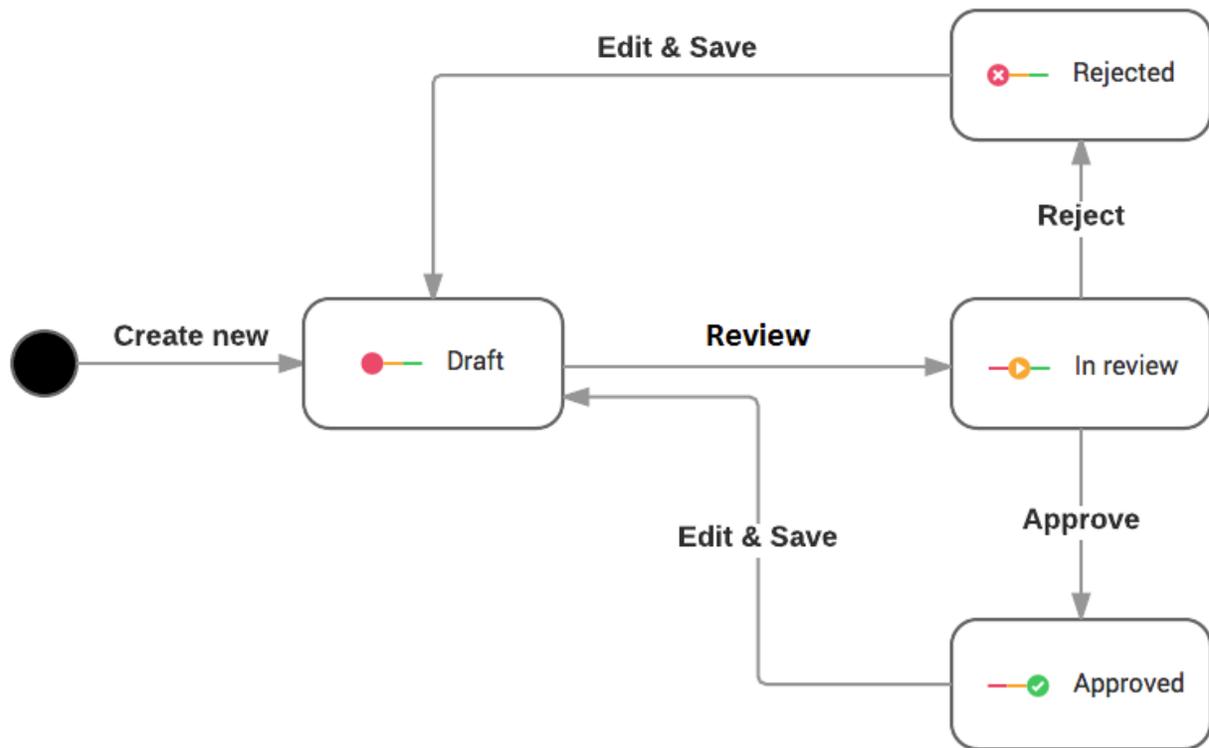
	<b>Draft</b> —authoring is in progress.
	<b>In Review</b> —the category is ready for approval review.
	<b>Approved</b> —the category is ready to be published to the server so it can be used by Knowledge Center.
	<b>Rejected</b> —the category has been reviewed and rejected—it requires further editing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

Let's look at an example of this workflow:

 <b>Draft</b>	When you create a new category or document, it has a status of <b>Draft</b> . You can edit and save it multiple times while it is still in <b>Draft</b> status.
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	<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 <b>In Review</b> status.</p> <p>You can also submit comments to the reviewer to explain the changes that you made and why they should be approved. <b>Note:</b> 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>
	<p>When you review a category or document that has a status of <b>In Review</b>, 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><b>Note:</b> If you change the contents of the category or document and then save it, it will receive a status of <b>Draft</b>, which means the approval workflow will be restarted.</p>
	<p>Once the category or document has been approved by the reviewers, it has a status of <b>Approved</b>. It can now be published to the Knowledge Center Server for use by agents and customers.</p> <p><b>Note:</b> If you change the contents of the category or document and then save it, it will receive a status of <b>Draft</b>, 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>
	<p>Rejected categories or documents have a status of <b>Rejected</b>. 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**.