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# Genesys Knowledge Center Deployment Guide

Installing the Workspace Desktop Edition Plugin

5/5/2025

# Installing the Workspace Desktop Edition Plugin

## Installing the Plugin for Workspace Desktop Edition

Agents can use the Knowledge Center Plugin for Workspace Desktop Edition (WDE) to access knowledge-related information right from their desktop. For example, if a customer asks a question using a chat widget and the corresponding interaction is routed to an agent, Knowledge Center can execute a pre-populated search based on data attached to the new interaction, as well as displaying the customer's search history and providing the agent with full access to the knowledge base access. And if the customer has not authorized during their search, the agent can link their session history to that customer's ID to access their full history while working with the interaction. To use this plugin complete the procedures below, in order.

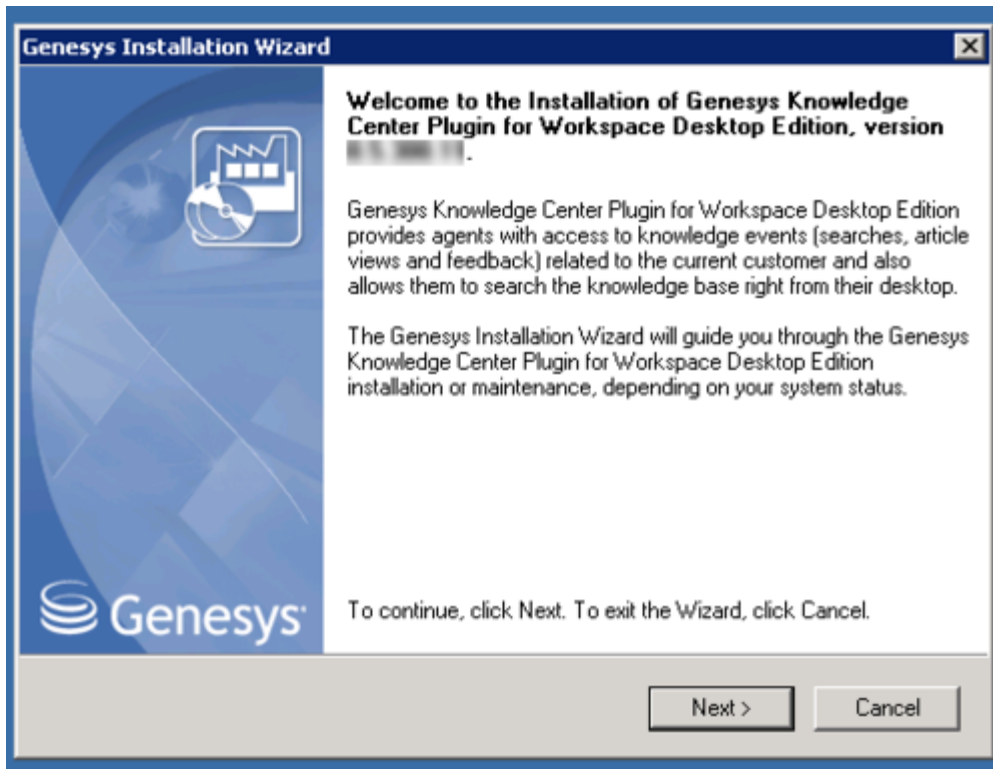
## Installing the Plugin for Workspace Desktop Edition

### Prerequisites

Workspace Desktop Edition must be installed and configured to work with voice or media interactions.

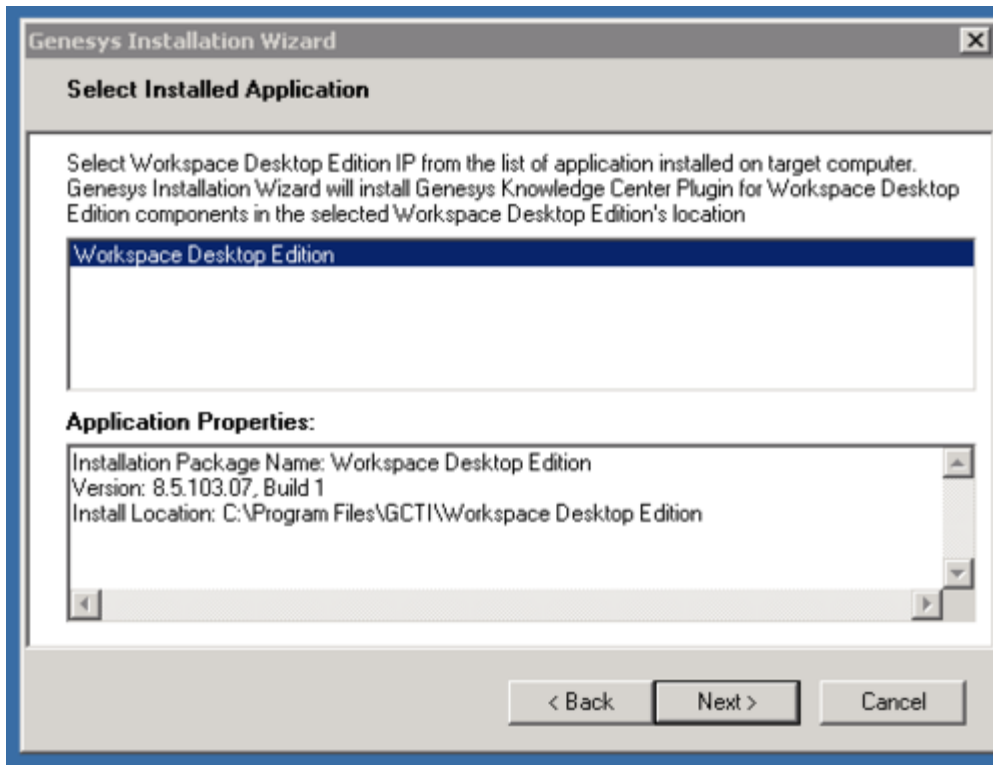
### Start

1. In your installation package, locate and double-click the **setup.exe** file. The Install Shield opens the welcome screen.



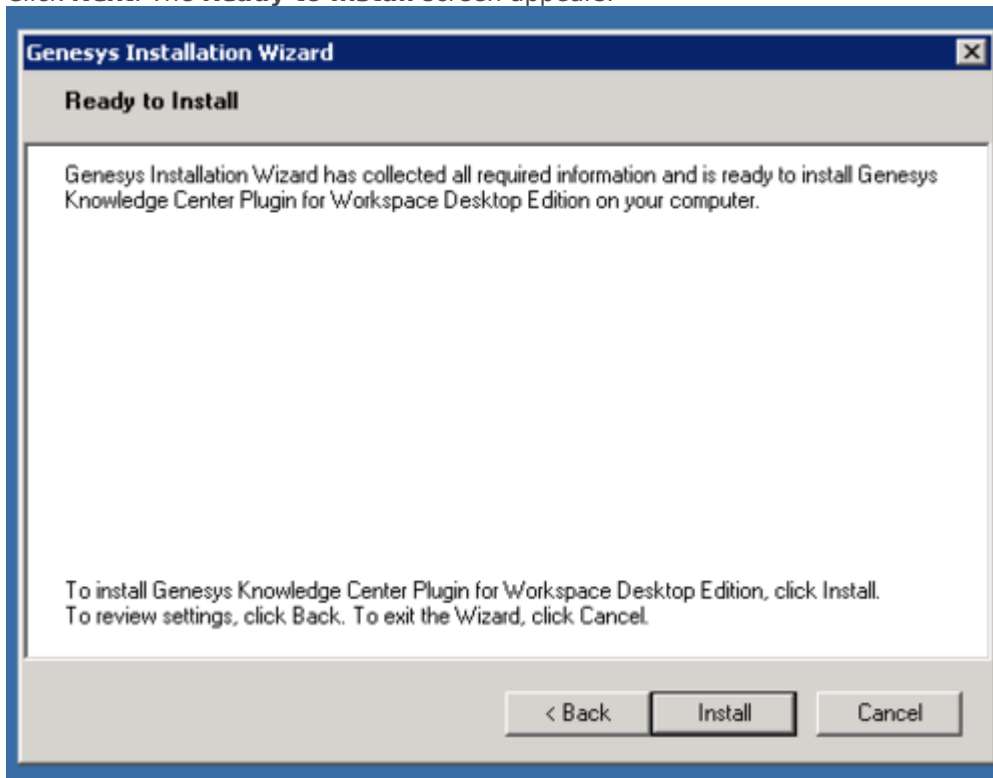
Knowledge Center WDE Plugin—Install Shield Screen

2. Click **Next**. The **Select Installed Application** screen appears.
3. Select the installed Workspace Desktop Edition Application for which you want to install the plugin. The **Application Properties** area shows the **Type**, **Host**, **Working Directory**, **Command Line executable**, and **Command Line Arguments** information previously entered in the Server Info and Start Info tabs of the selected Application object.



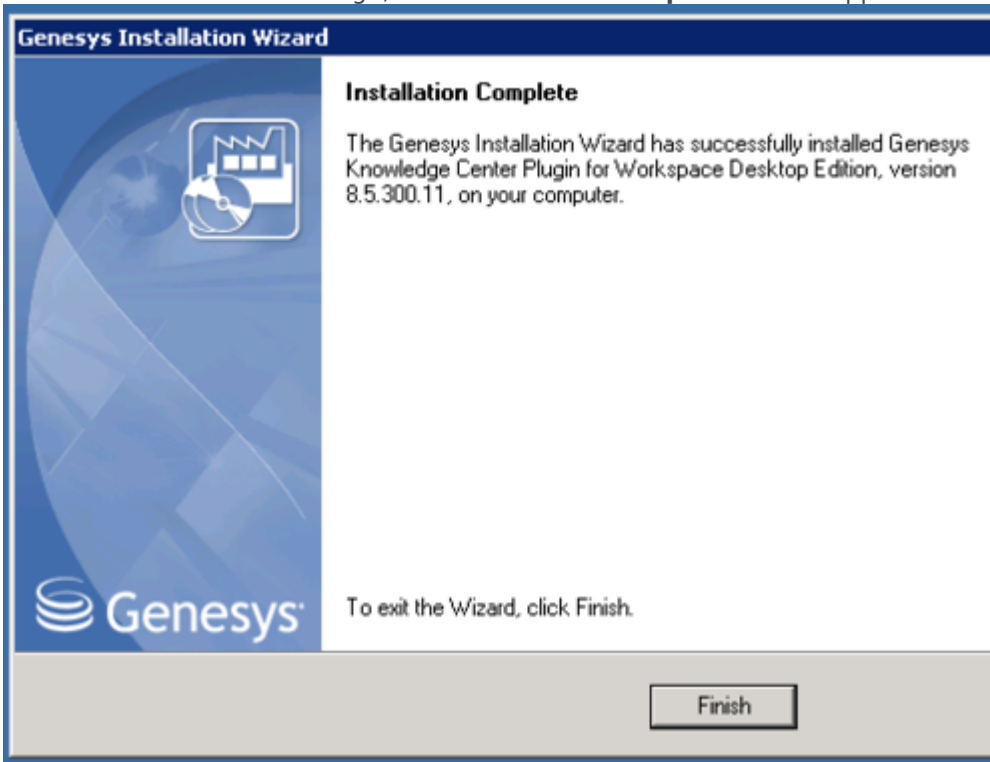
Select Installed Workspace Desktop Edition Application

4. Click **Next**. The **Ready to Install** screen appears.



Knowledge Center WDE Plugin—Ready to Install

5. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for Backend Server. When through, the **Installation Complete** screen appears.



Knowledge Center WDE Plugin—Installation Complete

6. Click **Finish** to complete your installation.
7. Inspect the directory tree of your system to make sure that the following files have been installed in the location that you intended:
  - *GWEInstallationFolder\Genesyslab.Desktop.Modules.Knowledge.dll*
  - *GWEInstallationFolder\Genesyslab.Desktop.Modules.Knowledge.module-config*
  - *GWEInstallationFolder\Genesyslab.Desktop.Modules.Knowledge.pdb*
  - *GWEInstallationFolder\Newtonsoft.Json.dll*
  - *GWEInstallationFolder\RestSharp.dll*
  - *GWEInstallationFolder\System.Net.Http.Formatting.dll*
  - *GWEInstallationFolder\Language\Genesyslab.Desktop.Modules.Knowledge.en-US.xml*

**End**

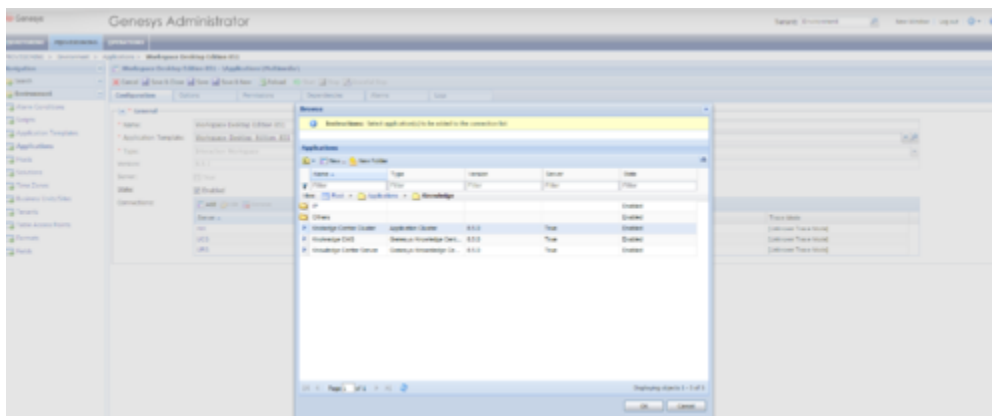
# Configuring the WDE Application to work with the WDE Plugin

### Important

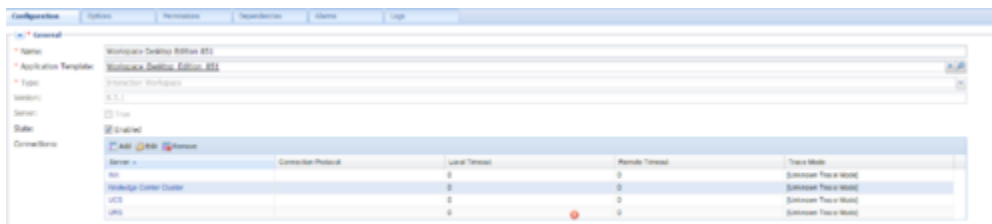
To run the WDE plugin correctly, the local storage must be enabled in Internet Explorer on the host with the WDE client application. To verify this, open **Settings > Internet Options** then click the **Advanced** tab > **Security**. Confirm that “Enable DOM-Storage” is checked. If it is not, click the check box and then save your updated settings.

## Add the Knowledge Center Cluster to Your WDE Connections

1. If your Workspace Desktop Edition application form is not open in Genesys Administrator, navigate to **Provisioning > Environment > Applications**. Select the application defined for the Workspace Desktop Edition and click **Edit....**
2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens. Select the **Knowledge Center Cluster application**, then click **OK**.



Knowledge Center WDE Plugin—Browse for applications 1



Knowledge Center WDE Plugin—Browse for applications 2

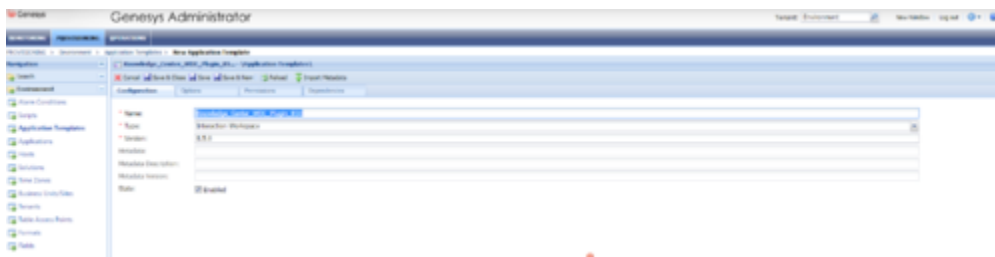
## Add Knowledge Center Options to Your WDE Application

To use the Knowledge Center Plugin for WDE, you need to add some options to your WDE application so that it can gather knowledge-related information from incoming interactions. You can add these

options to the the **interaction-workspace** section of the WDE application.

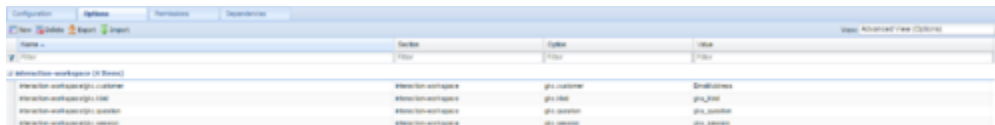
### Start

1. Import the template with the additional options:
  1. Open Genesys Administrator and navigate to **Provisioning > Environment > Application Templates**.
  2. In the **Tasks** panel, click **Upload Template**.
  3. In the *Click 'Add' and choose application template (APD) file to import* window, click **Add**.
  4. Choose the application template (APD) file from the import window and click **Add**.
  5. Browse to the *Knowledge\_Center\_WDE\_Plugin.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.



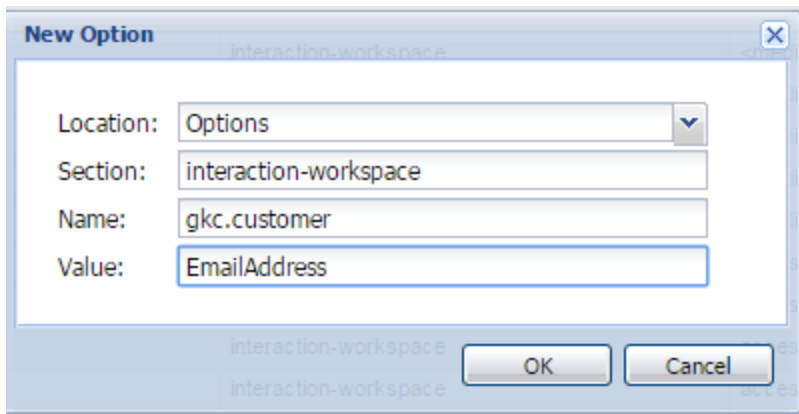
Knowledge Center WDE Plugin—New Application Template panel

6. Click **Save and Close**
2. Open the **Options** tab of the uploaded application and review the new options.



Knowledge Center WDE Plugin—Options tab of uploaded application

3. Navigate to **Provisioning > Environment > Applications**. Select the application defined for Workspace Desktop Edition and click **Edit...**
4. Open the **Options** tab.
5. Add the plugin options to the **interaction-workspace** section using the **New** button.



Knowledge Center WDE Plugin—Add plugin options

**End**

The Knowledge Center Plugin for WDE uses the following additional options:

Section	Option	Default value	Allowed values	Description	Takes effect
interaction-workspace	gkc.question	gks_question	any valid user data key	Interaction user data key that contains search query that will be pre-populated in Desktop	Next agent session
interaction-workspace	gkc.kbid	gks_kbid	any valid user data key	Interaction user data key containing the knowledge base Id to search knowledge in	Next agent session
interaction-workspace	gkc.customer	EmailAddress	any valid user data key	Interaction user data key that contains customer identification (for example email address of the customer)	Next agent session
interaction-workspace	gkc.session	gks_session	any valid user data key	User data key that contains knowledge session Id associated with the interaction	Next agent session
interaction-workspace	gkc.language	gks_lang, Language	comma-separated list of valid user	Interaction user data key that contains	Next agent session



Section	Option	Default value	Allowed values	Description	Takes effect
			data keys	language of interaction  This option can contain a comma-separated ordered list of keys. for example "gks_lang, Language"; in the case of several keys in the attached data, the first key in the list is used	
interaction-workspace	gkc.country	Country	any valid user data key	Interaction user data key that contains a region of interaction (used for multi-regional languages, for example en_US, en_UK)	Next agent session
interaction-workspace	gkc.spellcheck	false	true false	Enables or disables spell check correction of the searched query	Next agent session
interaction-workspace	gkc.send-document	false	true false	Allows agents to push a link to the document into the chat session transcript by clicking the <b>Send Document</b> button	Next agent session
interaction-workspace	gkc.extended-filters-view	false	true false	Allows you to display type labels for custom attributes in an applied filter  <b>Introduced in: 9.0.001.04</b>	Next agent session

### Providing Knowledge Center Access to Agents

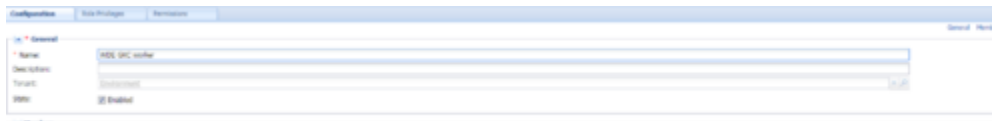
Genesys Knowledge Center supports the following privilege in order to restrict Agent access:

- **Knowledge.WORKER** — Enables access to the Genesys Knowledge Center tab in WDE
- **Knowledge.AUTHOR** — Enables ability to suggest new knowledge to knowledge bases.

To configure the appropriate role for an agent:

#### Start

1. Go to **Provisioning > Environment > Application Templates**.
2. Select the application template defined for Workspace Desktop Edition and click **Edit....**
3. Click **Import Metadata**.
4. Click **Add** and select the *Knowledge\_Center\_WDE\_Plugin.xml* file.
5. Click **Open**.
6. Information from the metadata file will be added to the template and the appropriate privilege will be added into the framework.
7. Save and Close.
8. Go to **Provisioning > Accounts > Roles**.
9. In the taskbar click **New** to create a new object.
10. Set the name of the role in the **General** section.



Knowledge Center WDE Plugin—Set Role Names

11. Go to the **Role Privileges** tab, and select the set of roles for Genesys Knowledge Center.
12. Open the WDE Knowledge Center Plugin privileges list and select the **Genesys Knowledge Center Privileges** section.
13. Create the appropriate privileges as allowed.



Knowledge Center WDE Plugin—Create Privileges

14. Go back to the **Configuration** tab.

15. Add the appropriate Agent to the **Members** section by clicking the **Add** button.

The screenshot shows the 'Members' section of the Knowledge Center WDE Plugin. It is divided into two main sections: 'Users' and 'Access Groups'. Each section has an 'Add', 'Edit', and 'Remove' button. The 'Users' section contains a table with columns: User Name, Agent, Last Name, First Name, Employee ID, and State. The 'Access Groups' section contains a table with columns: Name, Type, and State.

User Name	Agent	Last Name	First Name	Employee ID	State
default	False	default	default	0	Enabled

Name	Type	State
Administrators	Administrators	Enabled

Knowledge Center WDE Plugin—Members Section

16. Save and Close.

**End**