GENESYS™

Genesys Knowledge Center User's Guide

Managing Knowledge Bases

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Contents

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.
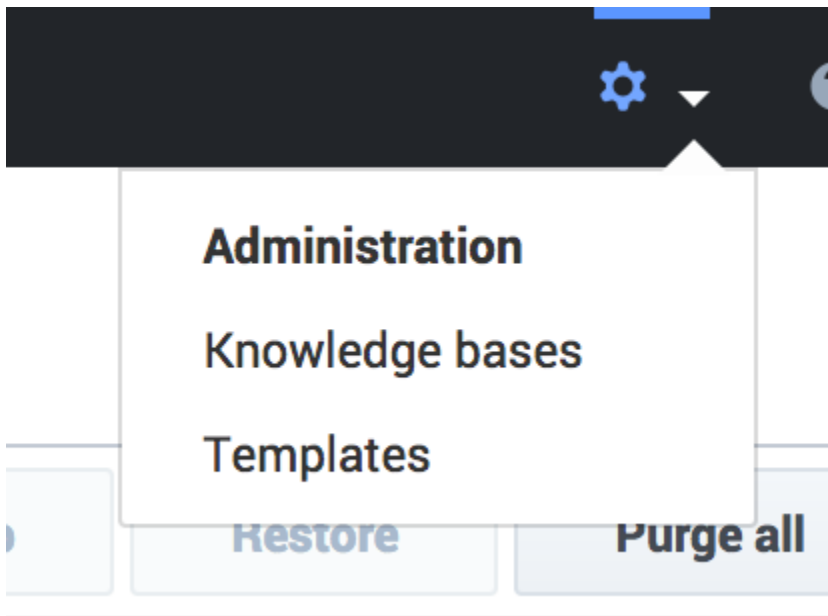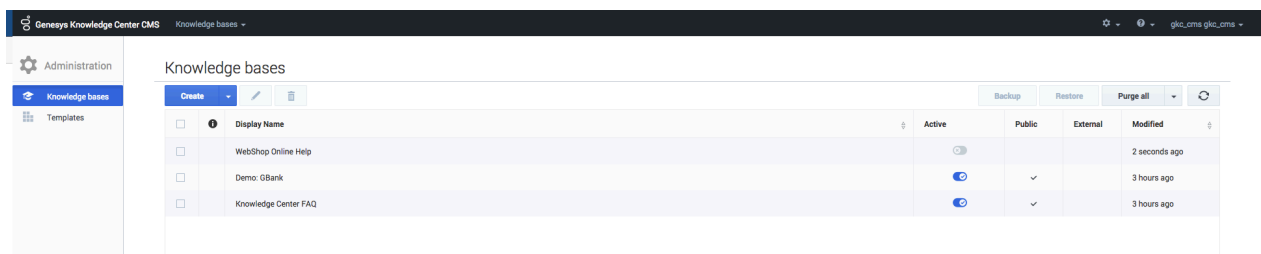

> ### Important
> To access the functionality you need to be assigned CMS Administrator privilege - Knowledge.CMS.Administrator (for more details, please see Access Permissions).

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**
- Select the **Approval Flow Type** (from version 9.0.003).

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)
>
> - Approval Flow Type - defines approval flow type in the knowledge base

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:
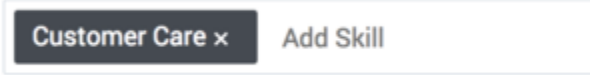
Active/Inactive

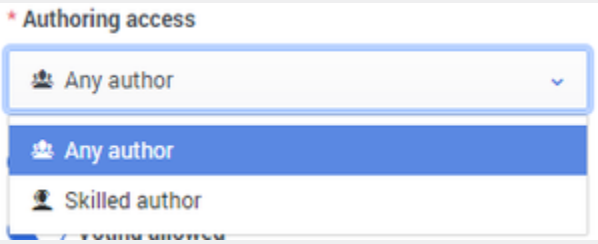|	
	Inactive (default) - If you select the inactive status for your Knowledge Base neither your customers nor your agents will be able to search for information in that knowledge base. Knowledge authors and knowledge administrators can still use the base to prepare content stored in it. Inactive status is recommended when your knowledge base is not ready for prime time
	Active - allows knowledge base to be available for search by agent and customer (according to set permissions)
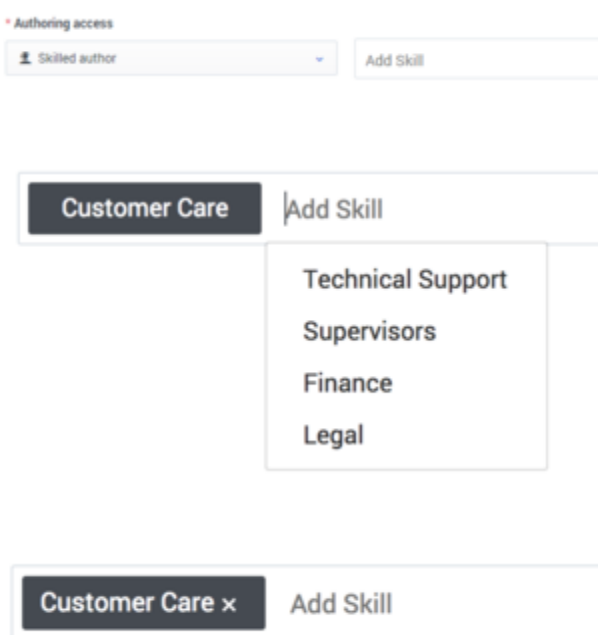
Access For Reading

Reading access allows to define knowledge base visibility for customer and agents:

	Reading access - defines the Knowledge base visibility for reading (default reading access is "Public"). You can specify whether the Knowledge base should be available to: • **Public** (default value) - all users (consumers and all agents) • **Agents only** - to all of your agents, but not exposed to customers • **Skilled agent** - only to the agents that have at least one of the specified skills.
	When **Skilled agent** is selected as the **Reading access** value, the skill selection is shown. It allows you to define the list of skills for restriction. In a case where you have specified several skills for the reading access, the agent needs to have at least one of them to access the knowledge base. Skill level does not influence the ability to access the knowledge base. To add a skill: 1. Select a **Skilled agent** access type. 2. Click **Add Skill** in the form field located to the right. 3. Type a skill name you would like to add and click enter.

	Hint: you can select it from the drop-down list provided. **Hint**: as you begin typing the skill name, a list of proposed skills is refined to match the information being typed. This helps to easily find the required skills in large lists. To remove a skill: 1. Move your mouse over the selected skill. 2. Click the **X** icon next to the skill name.

Access For Authoring

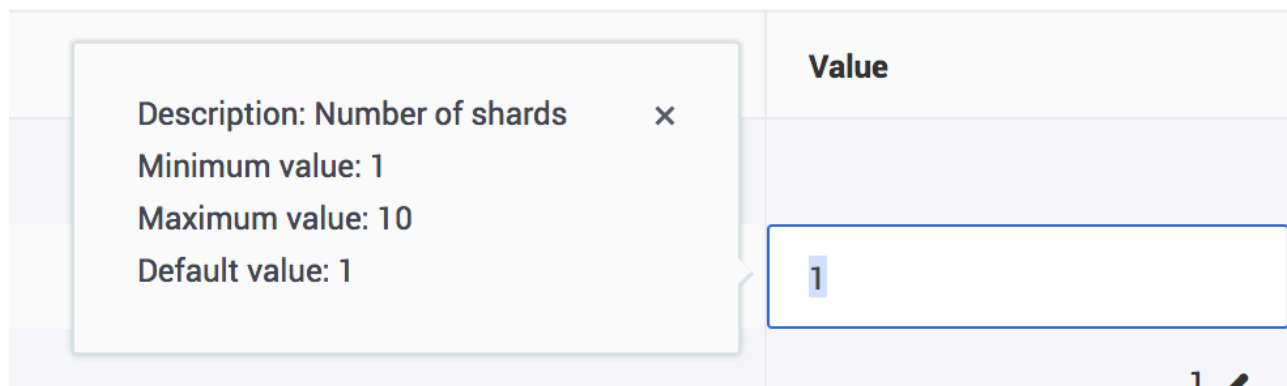|	
	Authoring access - defines the Knowledge base visibility for authoring (default reading access is "Agents only"). You can specify whether the Knowledge base should be available for authoring to: • **Any author** - any authors that have authoring privilege • **Skilled author** - only to the authors that have at least one of the specified skills.
	When **Skilled author** is selected as the **Authoring access** value, the skill selection is shown. It allows you to define the list of skills for restriction. In the case where you have specified several skills for the authoring access, the agent needs to have at least one of them to access the knowledge base. Skill level does not influence the ability to access the knowledge base. To add a skill: 1. Select a **Skilled author** access type. 2. Click **Add Skill** in the form field located to the right 3. Type a skill name you would like to add and click enter **Hint**: you can select it from the drop-down list provided **Hint**: as you begin typing the skill name, a list of proposed skills is refined to match the information being typed. This helps to easily find the required skills in large lists. To remove a skill: 1. Move your mouse over the selected skill. 2. Click the **X** icon after the skill name.

Behavior Options

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

Behavior

Name	Value
⌄ 📁 index	
Number of shards	1 ✏
Number of replicas	1 ✏
⌄ 📁 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:

Value

Description: Number of shards ✕
Minimum value: 1
Maximum value: 10
Default value: 1

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## 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:
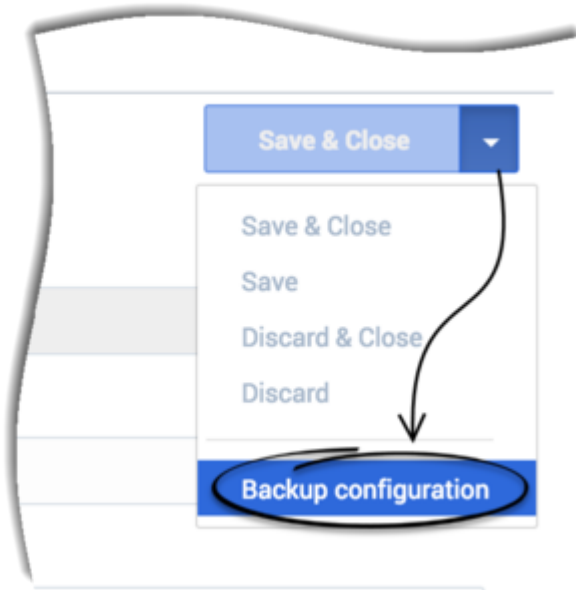
5. The browser downloads a text file with the knowledge base configuration (name: knowledgenbaseId + ".scheme").
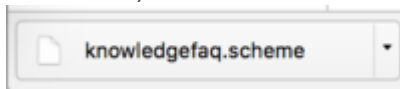
6. Go back to the **Knowledge Bases** page.

7. In the **Create** drop-down menu select the **Import ...** option:
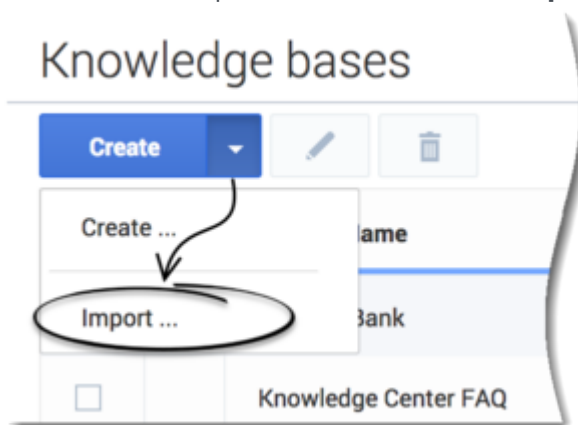
8. Select **Browse**, choose the recently downloaded file in the opened dialog window and then, click **Import**:

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.

Importing Knowledge Base Content

You can import your own data (documents+categories) to the knowledge base.

1. Click **Knowledge bases** from the toolbar at the top
2. Choose your knowledge base from list
3. Click the **Documents** tab
4. Click the arrow next to the **Create** button
5. Click **Import...**
6. Choose the XML-based file with your data
7. Choose the language
8. Click **Import**
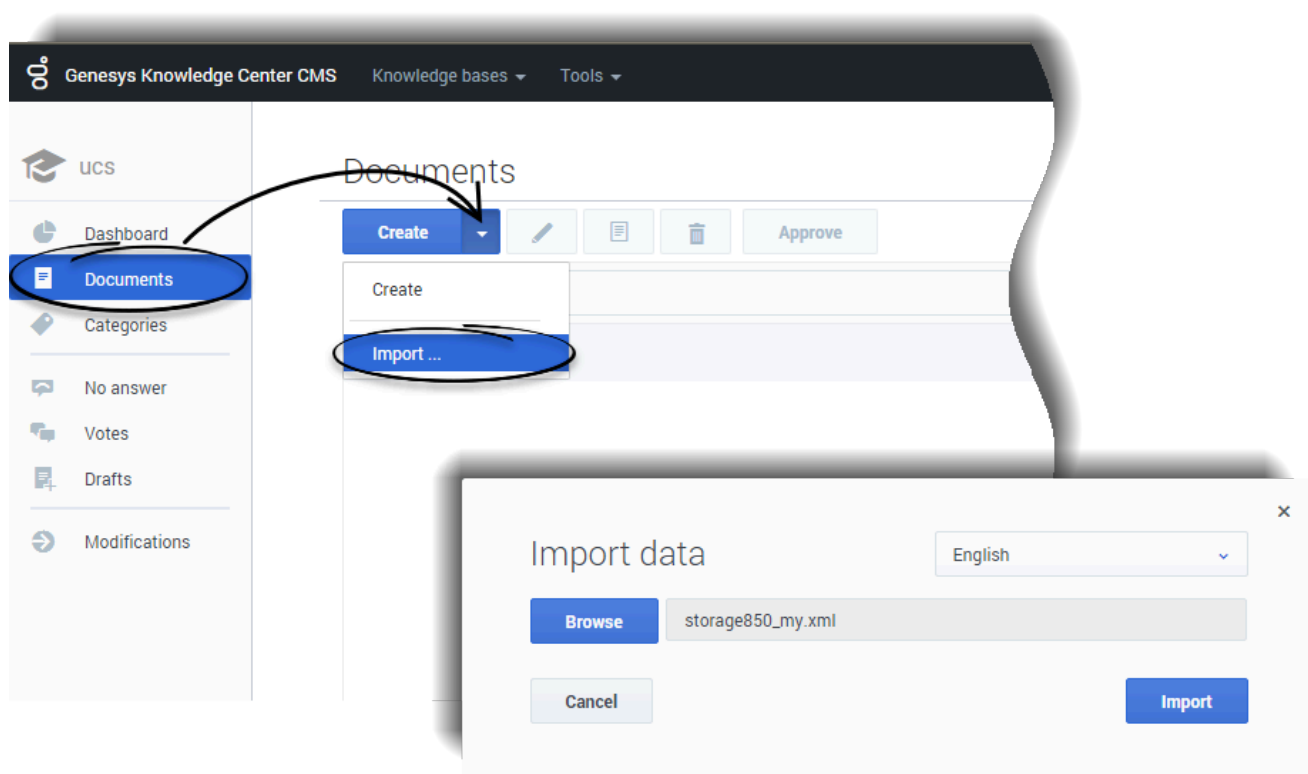
Supported data format

The Import tool supports xml-files with the following structure:

```xml
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<knowledge lang="en" kbId="knowledgefaq" version="9.0.000">
    <categories>
        <category>
            <id>cat1</id>
            <categoryParentId></categoryParentId>
            <name>Root</name>
            <description></description>
            <status>APPROVED</status>
        </category>
        <category>
            <id>cat2</id>
            <categoryParentId>cat1</categoryParentId>
            <name>Cat ER 89313</name>
            <description></description>
            <status>APPROVED</status>
        </category>
    </categories>
    <documents>
        <document>
            <id>doc1</id>
            <templateId>basearticle</templateId>
            <status>APPROVED</status>
            <media/>
            <tags/>
```

```
            <alternatives/>
            <categories>
                <category>
                    <id>cat</id>
                </category>
            </categories>
            <customFields/>
            <title>
                <id>title</id>
                <value>Sample Article</value>
            </title>
            <content>
                <docField>
                    <id>description</id>
                    <value>Sample body.</value>
                </docField>
            </content>
            <additional>
                <docField>
                    <id>summary</id>
                    <value></value>
                </docField>
            </additional>
        </document>
    </documents>
</knowledge>
```

Fields descriptions

- `templateId` - id of basic or custom template. Predefined templates are:
  - `basefaq`
  - `baseartcile`

- `title` - named field(s) for document title part:
  - For FAQ it is 'question'
  - For 'Article' it is 'title'

- `content` - named field(s) for document content part:
  - For FAQ it is 'answer'
  - For 'Article' it is 'description'

- `additional` - named additional field(s):
  - No additional fields for 'FAQ'
  - For 'Article' it is 'summary'

Purge Knowledge Bases

Using a **Purge operation** Genesys Knowledge Center enables you to remove broken or outdated content stored in Elasticsearch. Removing broken or outdated content from Elasticsearch will not

delete data or the knowledge base.

The Purge operation only deletes an Elasticsearch index associated with a deleted Knowledge Base (that is, if they were no deleted automatically) and removes categories that are not related to existing documents.
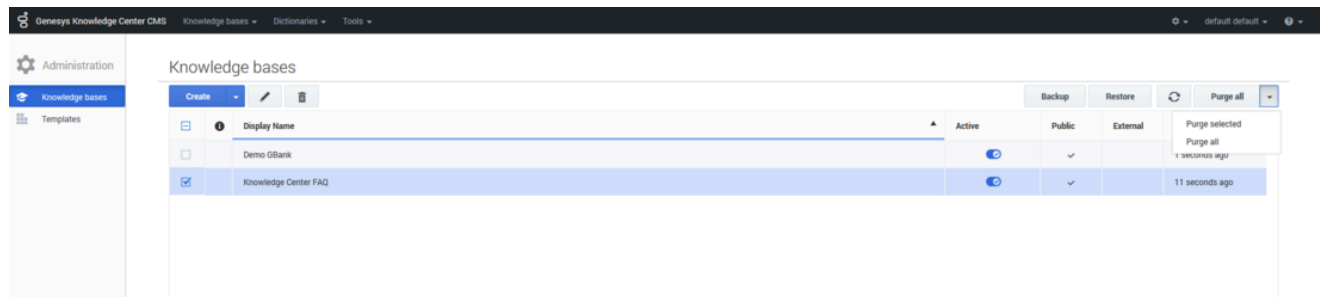
To purge a Knowledge Base

1. Open the Knowledge Base list.
2. Select the Knowledge Base you want to purge.
3. In the top-right corner of the screen open the **Purge all** list.
4. Select **Purge selected**.

Important

Select **Purge All** when you want to remove broken data in all the Knowledge Bases at once.