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Genesys Knowledge Center User's Guide

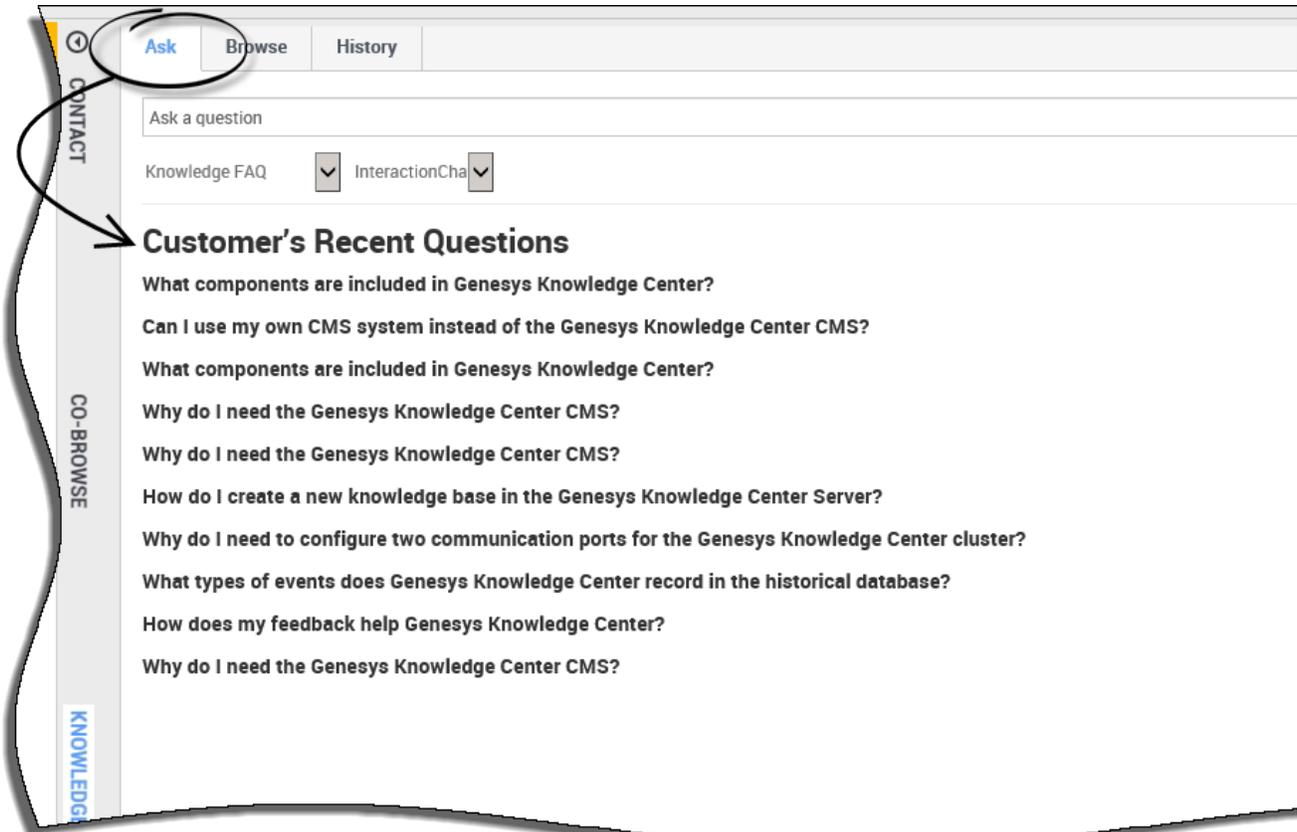
Getting started

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Getting started

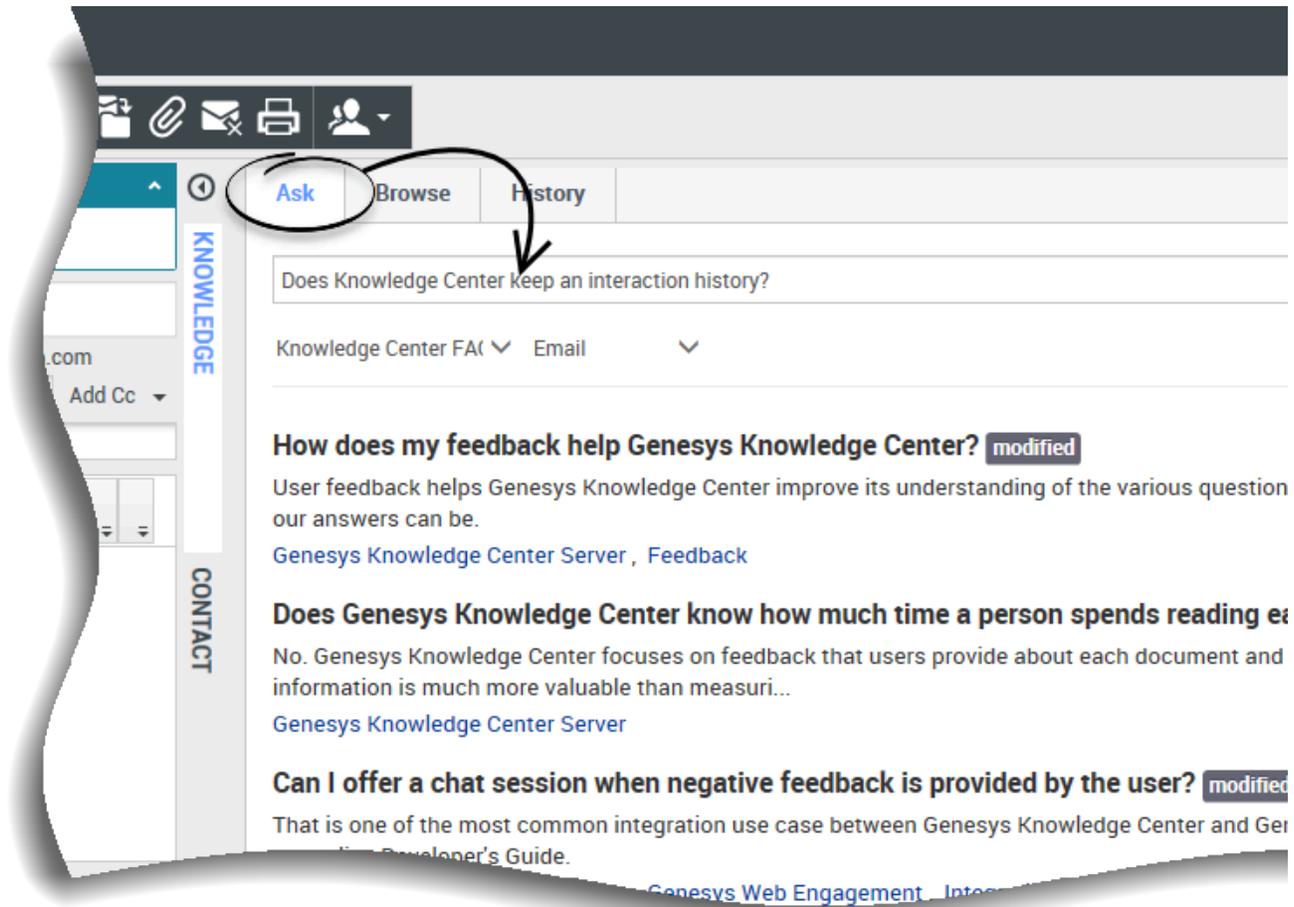
Viewing Recent Customer Questions



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

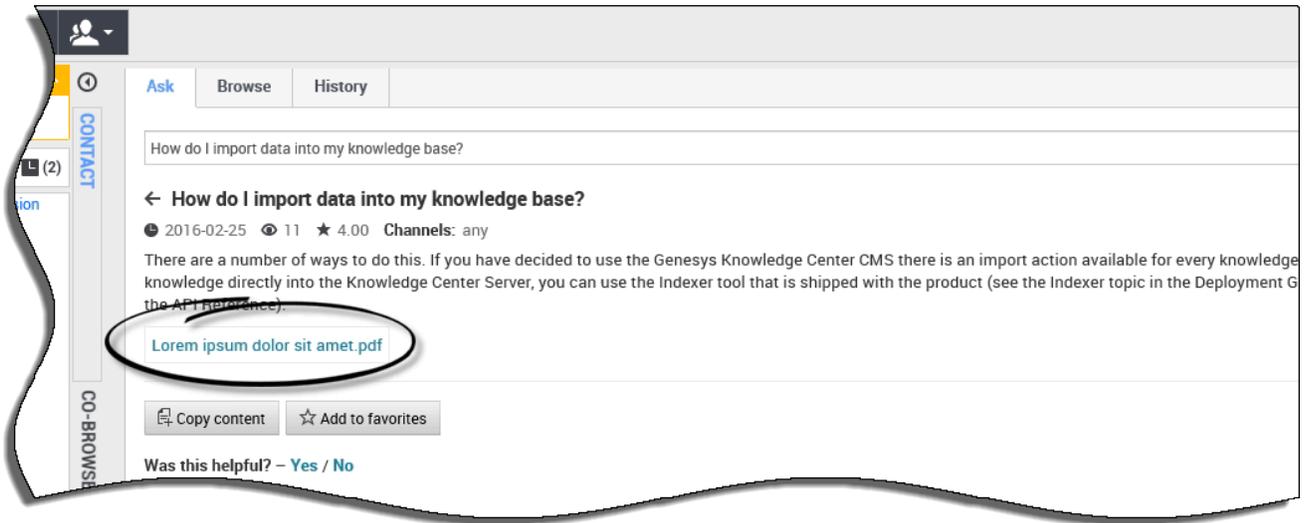


Use the following procedure to search for answers in a Knowledge Base.

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.

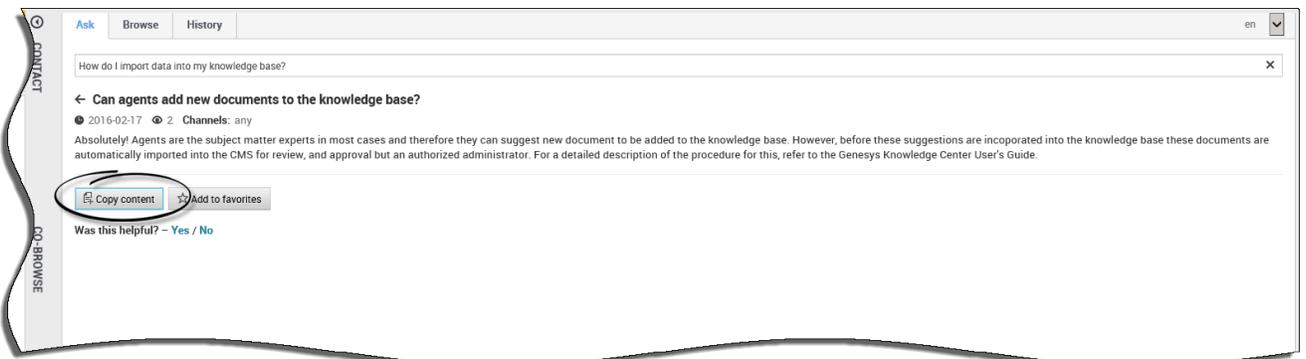
Viewing Attachments



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 public content of answers into your interactions:

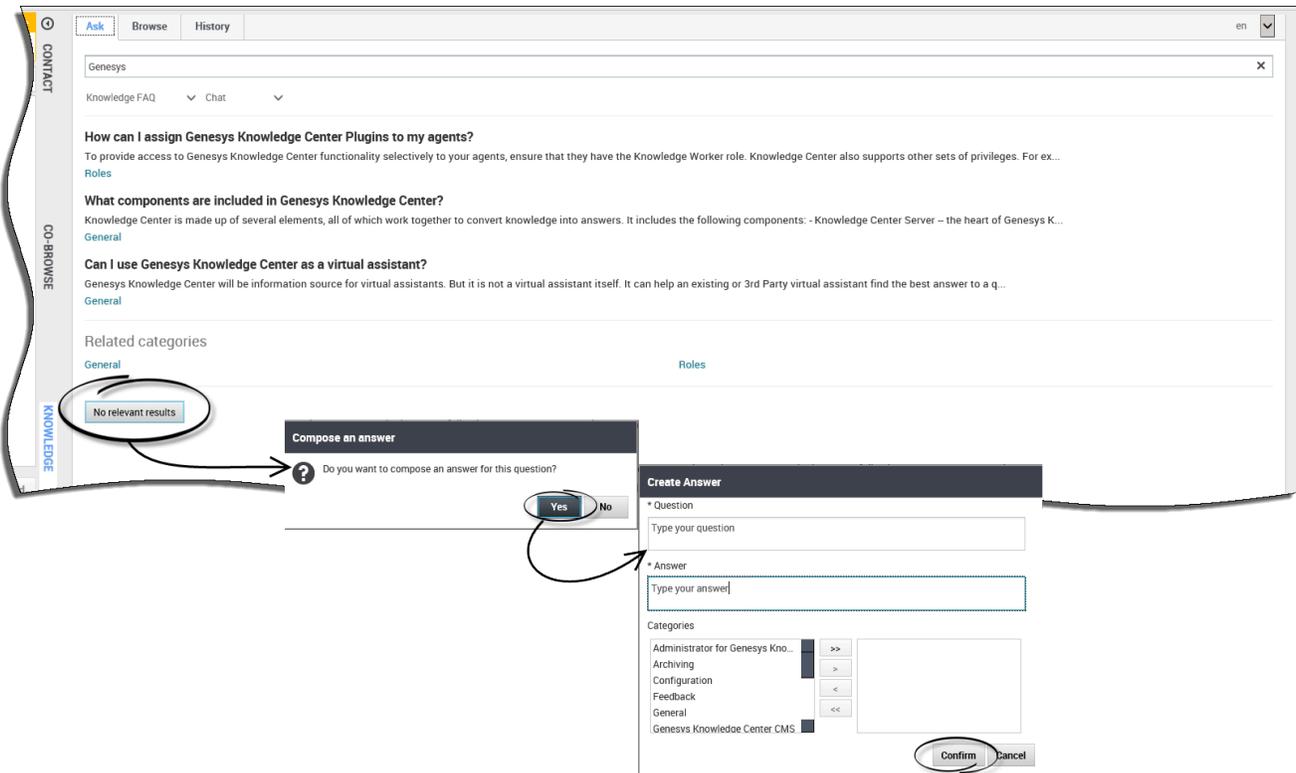
Prerequisites

- 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

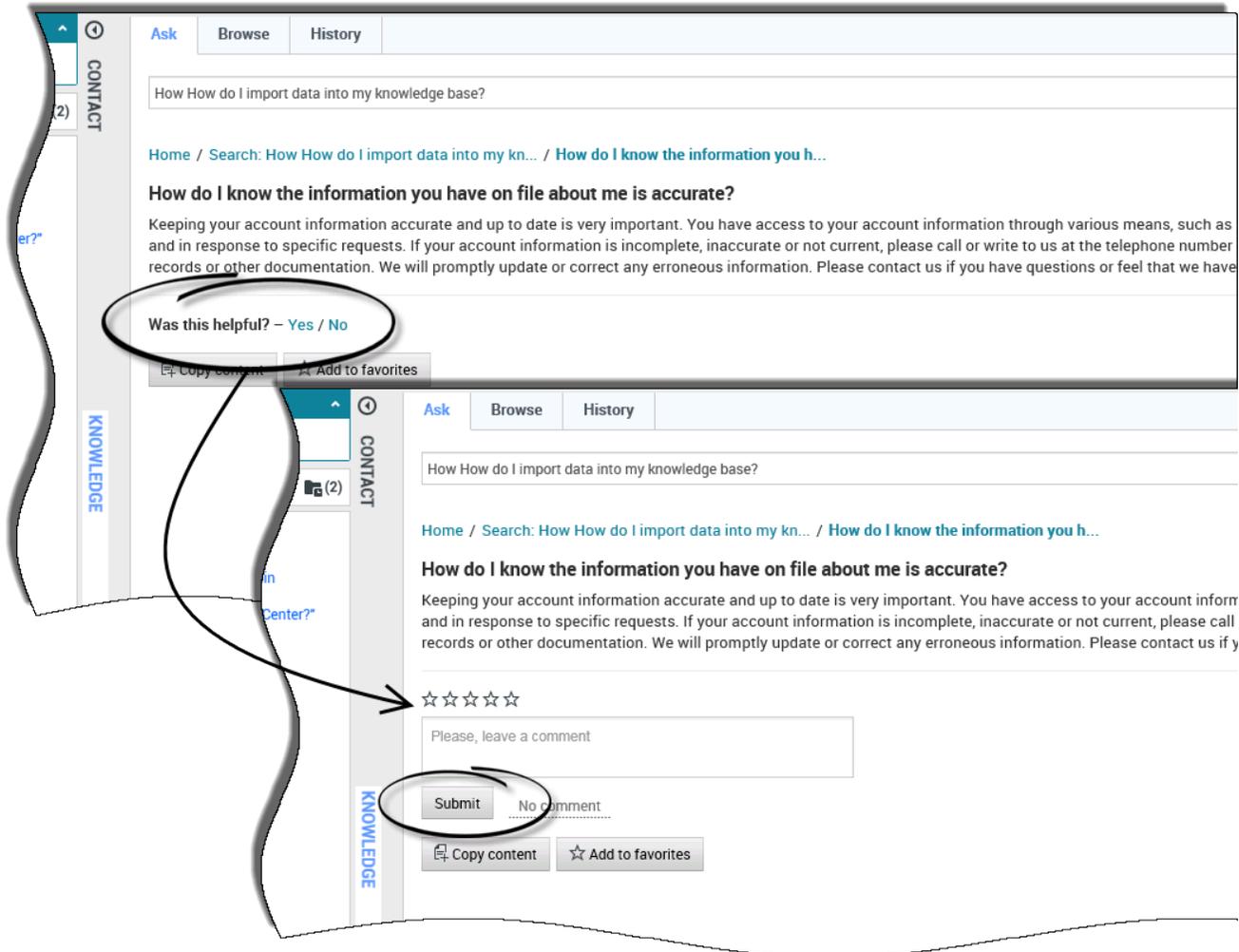
- The incoming interaction has been accepted.

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**.

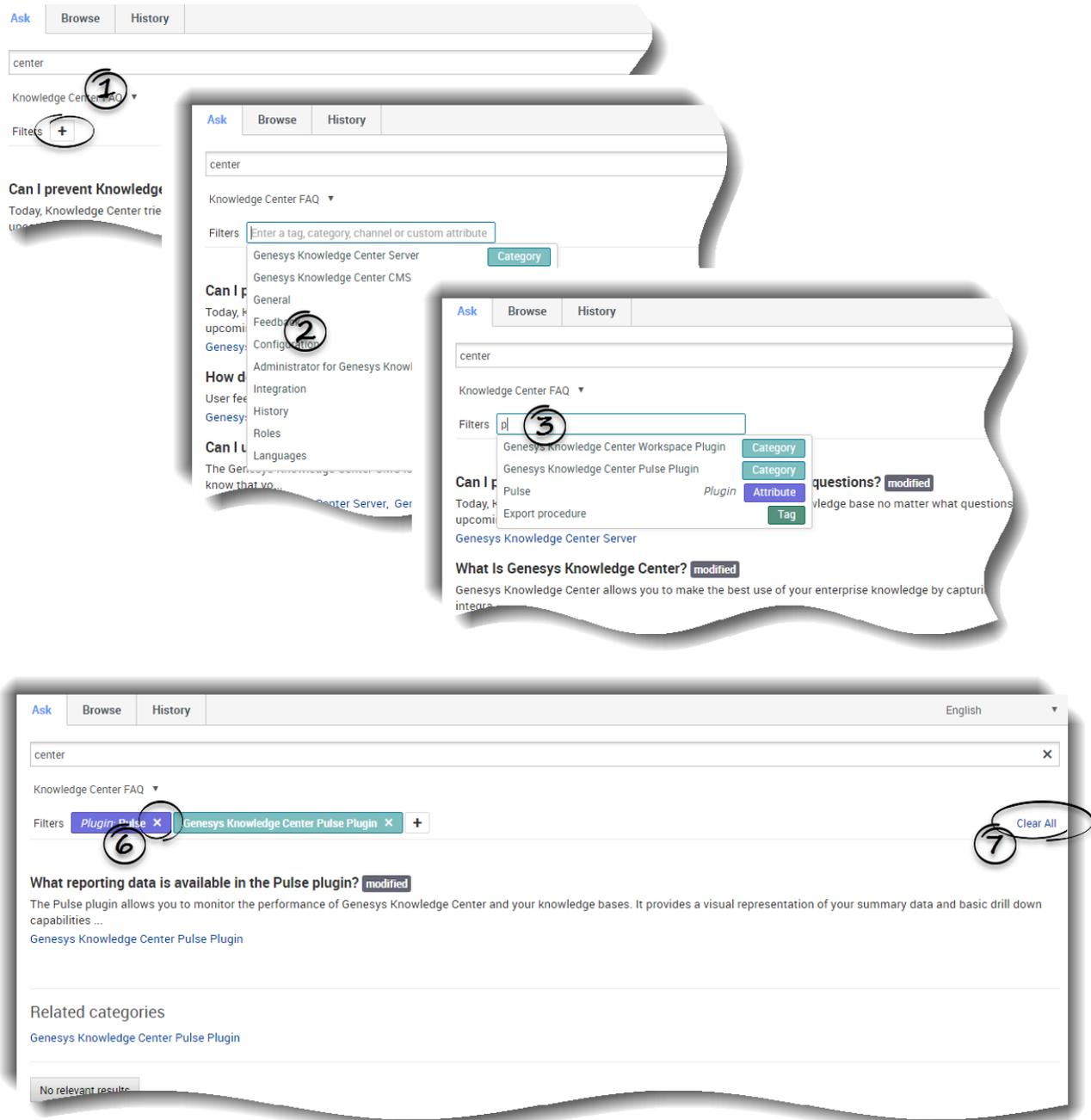
Search Result Filters

Important

This functionality is available as of the 9.0.001.xx release of the product.

You can use search result smart filtering to improve the precision of your search results. Also, while browsing, smart filtering allows you to type in contextual information that is related to your question and Knowledge Center will provide suggested filters that can be applied in the given context. Knowledge Center analyzes the categories that documents are assigned to, as well as the documents' attributes, tags, and channels to come-up with the most relevant suggested filters for you to choose from.

How to use smart filtering when asking a question



Under the **Ask** tab, you'll find the **Filters +** area immediately below the "Ask a question" field. To add a smart filter:

1. click on the **+** button.
2. When you click in the filter area you will be immediately provided with some suggested filters.

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3. As you begin typing in this field, Knowledge Center refines the list of suggested filters to reflect the context you are searching.
4. Knowledge Center suggests smart filters based on the:
 - categories used
 - document attributes
 - document tags
 - channels that knowledge can be used across
5. Click on one of the suggested filters to add it. This will refine the results on your ask query.
6. To remove a smart filter, click on the **X** next to the filter name.
7. To remove all applied filters, click on **Clear all** at the end of the Filters line.

How to use smart filtering when browsing the knowledge

The image illustrates the smart filtering process in the Knowledge Center interface through four sequential screenshots:

1. The 'Filters' section is shown with a '+' icon circled in red, indicating the initial state.
2. A search input field is shown with a dropdown menu of suggestions, with the first suggestion circled in red.
3. The search input field is shown with the text 'D' and a dropdown menu of suggestions, with the first suggestion circled in red.
6. The 'Filters' section is shown with two filters applied: 'Plugin: Pulse' and 'Genesys Knowledge Center Pulse Plugin', with the 'X' icon next to the first filter circled in red.
7. The 'Clear All' button is circled in red, indicating the final step to remove all filters.

Under the **Browse** tab, you'll find the **Filters +** area immediately below the knowledge base selection.

To add a smart filter you need to:

1. Click on the **+** button.
2. When you click in the filter area you will be immediately provided with some suggested filters.
3. As you begin typing in this field, Knowledge Center refines the list of suggested filters to reflect the context you are searching.
4. Knowledge Center suggests smart filter based on the:
 - categories used
 - document attributes
 - document tags
 - channels that knowledge can be used across
5. Click on one of the suggested filters to add it. This will refine the results on your browse query.
6. To remove a smart filter, click on the **X** next to the filter name.
7. To remove all applied filters, click on **Clear all** at the end of the Filters line.

Next, let's check out some of the Knowledge tab's [advanced features](#)!