

GENESYS[®]

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Genesys Knowledge Center User's Guide

Working with Documents

5/6/2025

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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:

00°	Genesys Knowledg	e Center CM	S Knov	vledge ba	ases 🗕 Di	ctionaries 🖥											🌣 👻 John Doe	- 0 -
12	Knowledge Center FAQ		Doci	umer	nts													
¢	Dashboard		Crea	ate	-	=	Î	Review	Approve	-							Publish	Ð
	Documents			0	Question					•	ę		All Statuses	~	0	Ð	Modified	•
•	Categories				Can I store	knowledge	articles	in different langua	ages?			FAQ	0	_	~	~	1 seconds ago	
R	No answer				How do I in	mport data	nto mv k	nowledge base?				FAQ	0	_	~	~	1 seconds ago	
-	Votes				ls agent fe	edback trea	r Ited diffe	rently from custor	mer feedback?			FAQ	0	_	~	~	1 seconds ago	
峄	Drafts				Should I le	t Genesys F	nowleda	e Center Server ki	now how many an	swers a user viewed	?	FAQ	0	_	~	~	1 seconds ago	
Э	Modifications				Why is the	correct and	wer show	vn as the second	item in the list of a	inswors?		FAO	-0	_	~	~	1 seconds ano	
					What is the	What is the difference between the Knowledge Cluster and the Knowledge Server?				EAO			~	~	1 seconds age			
					What is a l	What is the difference between the Knowledge Cluster and the Knowledge Server?				FAQ					r seconds ago			
					what is a P	cnowledge i	ase?					FAQ		_	~	~	i seconds ago	
					Can I use (Genesys Kn	owledge	Center as a virtua	l assistant?			FAQ	0	_	~	~	1 seconds ago	
					How are attachments used in finding the right answer to a question?					FAQ	0	_	~	~	1 seconds ago			
					How can I	add search	capabilit	y to a custom age	ent desktop?			FAQ	0	_	~	~	1 seconds ago	
					What Is Ge	enesys Knov	vledge Ce	enter?				FAQ	0	_	~	~	1 minute ago	
					How does	Genesys Kr	owledge	Center find the ri	ght answers to my	questions?		FAQ	0	_	~	~	1 minute ago	
					What is th	e Sample U	?					FAQ	0	_	~	~	1 minute ago	
					Why do I n	eed the Ger	iesys Kno	wledge Center Cl	MS?			FAQ	0	_	~	~	2 minutes ago	
Eng	lish >				Can I do S	earch Engin	e Optimiz	ation for articles	created in the Gen	esys Knowledge Ce	nte	FAQ	0	_	~	~	2 hours ago	
Bas	e >		1 _ 15	6 of 52	15 🛩	per page							< <	< F	Page	1	of 4 > > >	
		«																

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

ິ Genesys Knowledge Cente	er CMS Knowledge ba	86 ×				¢.	Ø → gkc_cms gkc
Knowledge Center FAQ	Documer	nts					
Documents	Translate	🖊 🖻 📋 Review Approve 👻					Publish O
Categories	. 0	Question	e :	Туре	All Statuses 🗸 🤡	Ð	Modified T
Drafts		Can I use Genesys Knowledge Center as a virtual assistant?		FAQ	-0	0	3 hours ago
No answer		How can I set access control for my administrators and managers?		FAQ	-0	0	3 hours ago
Modifications		How can I archive older knowledge base articles?		FAQ	-0	0	3 hours ago
MANILANTIN		un stastero?					
ase >	1 , 15 of 52	15 V per page			C C Page	1	of 4 >>>

Filtering list of documents

From the list of documents you can:

• filter out the list of documents by content: Knowledge bases - Dictionaries -

Docui	mer	nts						
Create	e -	- / 🖹 💼 Review Approve -					Publish	0
	0	card × ♦	All types 💉	All Statuses \checkmark	0	€	Modified	•
		How do I access my account?	FAQ	Ø	~	0	22 hours ago	^
		What do I do if my credit card or debit card is lost or stolen?	FAQ	Ø	~	0	22 hours ago	
		Does the business debit $\frac{1}{2}$ offer any rewards such as frequent flyer	FAQ	0	~	0	22 hours ago	
		How do I activate my debit card?	FAQ	0	~	0	22 hours ago	
		Where can I use my debit card to inquire about account balances trans	FAQ	0	~	0	22 hours ago	
		an ATM?	FAQ		~	0	22 hours ago	

• filter out the list of documents by category:

🕸 🚽 🛛 John Doe 🚽 🙆 🚽

	Review Approve	*						Publish	0	
0	Question	\langle	● 1 ♦	All types Y	All Statuses	~ 🚷	Э	Modified	•	
	Using Online Banking outside the United States			Article	0	~	0	22 hours ago		
	Computer equipment and software required for Online Banking		Select c	pategories						
	Free and secure SiteKey service		Select	alegones						
	Reset your passcode		Q Search o	categories						× ^
				Crechnical and security Crechnical and security Account Business Online and Mobile Other Service		_				

• filter out the list of documents by type and used template (from 9.004.xx version): mter CMS Knowledge bases - Dictionaries - Tools -

Jocun	nents						
Create	🝷 🖌 🗐 📋 Review Approve <table-cell></table-cell>					Publish	0
	1 Question	All types ^	All Statuses 🗸 🗸 🗸	0	Э	Modified	•
	Are there any vehicles that GBank does not finance?	All types	-0-	~	~	1 hour ago	^
	What happens if my mobile device becomes lost or is stolen?	Article >	Custom Article	~	~	1 hour ago	
	Can I link my GBank and Merrill Lynch online accounts?	FAQ >	Standard Article	~	~	1 hour ago	
	When are employees vested in a 401(k) plan?	FAQ	0-	~	~	1 hour ago	
	Haw da Lagages my account?	540				1 hour ago	

• filter out the list of documents by current status:

Docum	ents										
Create	- / 🗉 🔒 Review Ap	pprove 👻								Publish	e
	Question		•	¢	All types	~ Dra	ft) 0	Э	Modified	•
	Are there any vehicles that GBank does not finance?				FAQ		•	~	0	1 seconds ago	

- sort the template list by:
 - document name
 - modification date

The final 2 columns display:

- A notification about whether or not the document includes translation on current language
- A notification about errors in the document (for example, the document has not attached a category)

Creating a document

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

How to create new document?	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
Alternative Questions Add alternative question Tags Genesys Knowledge Center CMS Add Tag	*Optional Enter values in Alternative Question and Tags fields by typing in a value and then pressing "Enter" to create the new entity.
	*Ontional
Attachments Add attachment	Add an Attachment . The following is a full list of the types of attachments that can be addedtxt, .doc, .docx, .pdf, .rtf, .asc, .csv, .xhtml, .html, .xml, .readme, .ppt, .pptx, .jpg, .png, .jpeg, .pjpeg, .bmp, .gif, .svg, .tiff, .vnd, .ico, .wbmp, .webp, .mpeg, .webm, .ogg, .wmv, .flv, .3gp, .3gp2, .mp4, .aac, .mov, .avi, .raw, .xls, .xlsx.
	*Optional
	Set Start and Expiration dates.
-	• Start date indicates that the document will be not published to Knowledge Server before this date, even if it has been approved
2019-03-20 Expiration date (will expire in 22 day(s)) 2019-03-28	• Expiration date indicates that the document will be not available in Knowledge Server after this date, even if it has been published. The expired document will also not be published to Knowledge Server, even if it has been approved.
	 Servers use these dates assuming that they are in Greenwich Mean Time (GMT). For example, if your local timezone is GMT+8, these dates will take effect eight hours later.
Clarosh	*Optional
colorowang ta Ad Channel	Add a list of media channels if this document provides data to a
	conversation via specific media (like chat, for example).



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Sumber						
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	Restriction .

- A document with a broken link cannot be published. You must fix or remove any broken link(s) from the document in order to publish that document.
- A message will appear if you try to review or approve a document that contains a broken link.
- If a document with a link was previously published, it will automatically be unpublished when the linked document is deleted from the Knowledge Center server.

*Optional

Add a table of contents (TOC) to any document in any knowledge base:

- 1. Place the cursor on the line that you want to format as a header.
- 2. From the **Paragraph Format** list select the appropriate header. Repeat this step for every header in the document.
- 3. Scroll to the top of the document and place the cursor at the beginning of the document.
- Click Table of Contents. The TOC appears. Note: Every time you click Table of Contents, the TOC is recreated in the location of the cursor. Before you update the TOC verify that the cursor is located above the existing TOC.

*Optional

Add a link from one section of a document to a different section in the same document. Adding links to different sections in the same document enables agents to effortlessly navigate within the document to find answers to customer questions.

- In the body of the document, select the text that will be the target of the link that you will create in a different section of the same document.
- 2. Click **Anchor** to create an internal link to the selected text.
- 3. In the body of the document, select the text that will act as the link to the text selected as the target of your link.
- 4. Click Link and from the Link Type list select Link to anchor in the text.



5. In the **By Anchor Name** section of the window select the anchor you created in the previous step and click **OK**.

Note: Repeat these steps for every link you want to create within the document.



Characters Allowed in Names

The names of most Knowledge Center CMS objects can consist only of the alphanumeric characters supported in UTF-8, plus the characters listed below in the "Additional Characters Allowed in Object Names" table.

The length of a category name cannot be longer than 64 characters.

The **Display Name** for the **Language** Business Attribute can only consist of Latin characters and numbers (A-7, a-z, 0-9).

Name	Character	Name	Character	Name	Character
Hyphen	-	Exclamation point	!	Backslash	١
Number sign, pound	#	Dollar sign	\$	Parentheses	()
Caret	^	Asterisk	*	Question mark	?
Underscore	_	Curly brackets	{ }	Space	
Angle brackets	< >	Period, full stop		At sign	@

Additio	onal Char	acters A	llowed i	in Oh	iect N	ames
7.000101			now ca			annes

Important

Applicable only for CMS from version 9.0.000.15 to 9.0.005.04.

Document categories

cument editor view	
Can I do Search Engine Optimization for articles created in the	Categories attached to the document (selected categories) are rendered by default in the Categories tree.
Can I do Search Engine Optimization for articles created in the Compare Poperties Poperties Compare Poperties Pop	 To view Recent categories: Click in the Categories tree toolbar. Recent categories are marked with a bold, gray background, their relevant icon, and have an Add to category link near the category name To attach Recent category(s) to the document, 2 options are available: Click the Add to category link near the category name to attach the category to the document. Click the Accept all suggested link to attach all recent categories to the document.

 Click in the Categories tree toolbar. Suggested categories are marked with a bold, gray background, thier relevant icon, and have an Add to category link near the category name. To attach Suggested category(s) to the document, 2 options ar available: Click the Add to category link near the category name to attach the category to the document. Click the Accept all suggested link to attach all Suggested categories to the document. To refresh the list of Suggested categories:
 Suggested categories are marked with a bold, gray background, thier relevant icon, and have an Add to category link near the category name. To attach Suggested category(s) to the document, 2 options a available: Click the Add to category link near the category name to attach the category to the document. Click the Accept all suggested link to attach all Suggested categories to the document. To refresh the list of Suggested categories:
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 Click the Accept all suggested link to attach all Suggested categories to the document. To refresh the list of Suggested categories:
To refresh the list of Suggested categories:
 Click (enabled only when suggested categories are displayed).
To view Selected categories:
• Click 🗹 in the Categories tree toolbar.
 Selected categories are marked with a bold, gray background, their relevant icon, and hav a Remove from category link near the category name.
To remove document from Selected category(s):
 Click the Remove from category link near the category name to deattach the category from the document.



Select document categories Image: select document categories Image: se	 To view Suggested categories: Click in the Categories tree toolbar. Suggested categories are marked with a gray background and have the hat icon near the category name.
Select document categories Image:	To view Selected categories: • Click in the Categories tree toolbar. • Selected categories are marked with a checkbox.

Al Conservation of the Conservation of Content CMS Content of CMS C	Char salartion	To view All categories in the current Knowledge base: • Click All in the Categories tree toolbar. • Category sub-trees are expanded to the terminal highlighted category or selected category, by default.
	Taketid Co	
Q. traditionary ins	Char selection	To attach Suggested or Recent category(s) to the document 2 options are available:
		 Check the checkbox in front of the highlighted category name to attach the category to the document. Click to

Translating a document

For a quick reference on how to:

- Translate (no source)
- Translate (with source)
- Machine translate
- Translating a document in compare mode

please see the following video— Link to video



Translate (no source)



How to translate the document?	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
Save & Close Save Save Discard & Close Discard	Click Save & Close or select one of the other options in the Save & Close menu.

Translate (with source)

Documents				
Translate (no source) Translate (with source) Machine translate	Click the arrow next to the Translate button in the toolbar and choose Translate (with source) fro the menu.			
What is Generopy Knowledge Center? If a generopy and generopy and a generopy and a generopy and	Translate the document fields using the source document content.			

Save & Close 🗸	
Save & Close	
Save	Click Save & Close or select one of the options in the Save & Close menu.
iscard & Close	
Discard	

Machine translate

Important

this mode of translation is only available when your administrator has configured an external translation service to translate content.



Save & Close 🗸	
Save & Close	
ave	Click Save & Close or select one of the c options in the Save & Close menu.
card & Close	
Discard	

Translating a document in compare mode



Translate Standard Article	Click the Compare button from the Document translation view.
Translate Standard Article Compare English 3 38 minutes agr No categories assigned Title What is Denesys Knowledge Center 7 Summary Genesys Knowledge Center allows you to make the best use of your enterprise knowledge by capturing, storing, and distributing it wherever it is needed.	Click Machine translate or Translate (with source) from the menu.
Was ist das Genetys Knowledge Certer?	Make edits to the translated fields, if necessary. If you clicked Translate (with source) , you must translate the content in the fields manually.
Save & Close Save Save Discard & Close Discard	Click Save & Close or select one of the other options in the Save & Close menu.

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**:

Documents

Tran	slate	Review Approve -				Publish 📿	
Ξ	0	Question +	Туре	All Statuses V	0	Ð	Modified
		What is tags for?	FAQ	•	~	0	3 seconds ago
		How do I configure two Knowledge Servers into a cluster?	FAQ	©		0	6 hours ago
		Can I use my own CMS system instead of the Genesys Knowledge Center CM	FAQ	-0-		0	6 hours ago

The document will look something like this:

g Genesys Knowledge C	enter CMS Knowledge bases + Tools +	🗘 🔹 system user 👻 😝 🗸
😢 test	What Is Genesys Knowledge Center?	• Approved
Documents Categories	History	Created 5 hours ago , last modified about 5 hours ago by default
Modifications	What is Generys Knowledge Center? I less than a minute of reading / 62 words,	eart of the system is the Genesys Knowledge Center Server, art of the system is the Genesys Knowledge Center Server,

Information about document word count and estimated reading time are found under the question title. The left side (with the agent icon) displays all information (both public + private) and shows the document word count and estimated reading time. The right side (with the customer icon) shows only the public document word count and estimated reading time.

Document history

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

ල් Genesys Knowledge Cente	er CMS Knowledge bases - Tools -
test Documents Categories	What Is Genesys Knowledge Center?
Modifications	What Is Genesys Knowledge Center? Itess than a minute of reading / 62 words, Itess than a minute of reading / 31 words Summary The ultimate goal of Genesys Knowledge Center is to convert your knowledge into answers to the question which is designed to find the best answer to every question you ask. Image: The ultimate goal of Genesys Knowledge Center is to convert your knowledge into answers to the questions you which is designed to find the best answer to every question you ask. Image: Categories
	Knowledge Center Additional Channels any

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

Genesys Knowledge C	enter CMS Knowledge bases - Dictionaries - Tools -
Knowledge Center FAQ	What is a knowledge base?
Dashboard	← / 1 Review History⊘-5 days ago ^ ④
Documents	• 5 days ago
Categories	Historical version is shown. Approved, modified by defaul 5 days ago
No answer	<u>Q</u> -54493.890
🖏 Votes	What is a knowledge base?
Drafts	Less than a minute of reading / 25 words
Modifications	A knowledge base is an organized collection of related inform
	Categories O 21 days ago
	General
	Additional
	Channels any

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



- (1) Approval status (Draft, In Review, Approved, Published) '
- (2) How many days since the version was created

Document version rollback

Important

This functionality is available starting with the 9.0.001.xx release of the product.





Comparing document versions

While editing a document you can compare the current version with any other version by clicking **Compare**:

Compare	English	~	19 days ago	~

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:

- English · - 2 minutes ago ·	
uestion hat Is Genesys Knowledge Center?	>> * Question What Is Genesys Knowledge Center?
Inswer State the single best answer to the Question. Genesys Knowledge Center allows you to make the best use of your enterprise knowledge by capturing, storing, and wherewe it is parted Built by Genesys. This product approaches in integrate to uprice Genesys products to provide or	distributing it
Genesys Administrator, reporting and basic analytics via Pulse and agent desktop integration to Workspace Desktop	Edition Edition Edition Edition Styles - Format - Format - Format - Format Genesys Knowledge Center allows you to make the best use of your enter distributing it wherever it is needed.Built by Genesys, this product seamles provide configuration via Genesys Administratory reporting and hasis apalu
	Workspace Desktop Edition

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

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.
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:
	×
	Are you sure you want to delete selected Documents?
	Warning! You are going to delete core version of selected documents All translated and regional versions of selected documents will also be deleted
	No

Important

If you delete the core version of a document (in other words a document created in the default language in a Knowledge Base), all translations and regional versions of this document are deleted. If you delete the translated version of a document and it has regional versions, all regional versions of this document are deleted.

Tip

If the deleted document was published to Knowledge Center Server it is deleted from the Server on the next manual or scheduled synchronization.