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Genesys Knowledge Center Deployment Guide

Access Permissions

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Access Permissions

Overview

Before starting up with Knowledge Center you need to:

- Define access rules for every knowledge base you have created
- Set up permissions for your knowledge team
- Set up access to knowledge for your agents

Knowledge Center leverages privileges and skills to define desired access level:

- Privileges used to grant access to functional capabilities such as authoring ability, approval rights, ability to work with knowledge in Workspace or ability to suggest content. Privileges assigned to roles that you can assign to your personnel.
- Skills allow you define knowledge areas that an agent or author can access. Skills are highly dynamic and allow you to provide additional knowledge while you assign areas of responsibilities to your agents.

Let's review these tasks a bit closer in the following sections.

Access permissions

Restricting access to Knowledge

To restrict access to the knowledge you need to define these restrictions for a knowledge base. All documents within knowledge base will follow the defined restrictions.

A knowledge base can be restricted–

for viewing:

- Public (Anyone) - its content is accessible to all agents and customers
- Private (Agent Only) - its content is accessible to agents only
- Private with skill restriction (Skilled agent) - content of the knowledge base is accessible to an agent with specific skills

for authoring:

- Any Author - any agent that is granted author privilege can create/update knowledge documents
- Authors with skill restriction - only agents that are granted author privilege and have one of the selected skills can create/update knowledge documents

Skill-based access allows you dynamically manage access to the knowledge along with managing the distribution of the customer's interactions. That ensures that there are no additional actions required when you assign an agent to a new area.

For example, say you have a knowledge base with restricted access for agents who have the skill "technical support", and the same skill is used for routing interactions to your group of agents. Adding the agent to the group by assigning him the "technical support" skill will automatically give him access to the proper knowledge bases.

Setting up Knowledge Team

The next task is to grant access to the CMS and knowledge bases to the members of your authoring team. CMS allows the following privileges to be granted:

- Administrator - allowed to manage knowledge bases (create new, modify and delete)
- Author: Categories - gives content author ability to create new categories, and modify and delete existing ones
- Author: Documents - gives content author ability to create new documents, and modify and delete existing ones
- Approver - designated for content managers who validate and approve created documents and categories

At least one of the above privileges are required to be able to work with CMS.

Also, content authors and managers need to be assigned proper skills to get access to the private knowledge bases with skill restrictions. **Note:** Administrators have access to any knowledge base, no matter the skill restrictions applied.

Granting access to agents

Agents follow the same concept. They require *privileges* to get access to functionality and *skills* for getting access to private knowledge bases with skill restrictions.

An agent can be assigned following privileges:

- Knowledge Worker - allows access to Knowledge Center functionality in the Workspace
- Knowledge Author - allows agent to suggest knowledge content from the Workspace

Also, agents need to be assigned proper skills to get access to the private knowledge bases with skill restrictions.

Configuration Procedures

Knowledge Center Privileges

Knowledge Center supports following privileges

Privilege	Product	Description	Since
Knowledge.AUTHOR	Knowledge Center Server	Allows changing data in a knowledge base. This privilege is required for agents that are running data synchronization from Genesys Knowledge Center CMS or third-party sources.	9.0.0
Knowledge.MULTITENANT	Knowledge Center Server	Allows to bypass tenants restrictions while importing data into knowledge bases. **Important** Required only for the multi-tenant deployments. Will not affect other privileges or access rights except authoring.	9.0.0
Knowledge.CanAccessPublic	Knowledge Center Server	Allows agents to access public knowledge bases. Used if the Cluster option privilege.can-access-public in section search is set to false	9.0.0
Knowledge.CMS.Document.Author	Knowledge Center CMS	Gives content author ability to create new documents, and modify and delete existing ones	9.0.0
Knowledge.CMS.Category.Author	Knowledge Center CMS	Gives content author ability to create new categories, and modify and delete existing ones	9.0.0
Knowledge.CMS.Approver	Knowledge Center CMS	Designated for content managers who validate and approve created documents and categories	9.0.0
Knowledge.CMS.Administrator	Knowledge Center CMS	Allowed to manage knowledge bases (create new, modify and delete)	9.0.0
Knowledge.CMS.Multitenant	Knowledge Center CMS	Allows bypassing tenant restrictions while working through API	9.0.0
Knowledge.Worker	Workspace Desktop Edition	Enable the Knowledge Center Plugin for the agent	9.0.0
Knowledge.Author	Workspace Desktop Edition	Allows agent to propose new knowledge documents from	9.0.0

Privilege	Product	Description	Since
		Workspace	

Privileges for typical Roles

The table below shows examples of typical roles and privileges required for them:

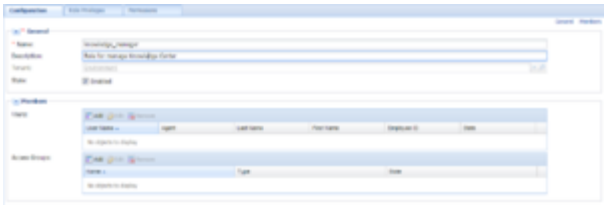
Role	Description	Privileges
CMS Administrator	• Manages Knowledge Bases • Sets up publishing schedules • Doing maintenance procedures with knowledge	• Knowledge.CMS.Administrator (CMS) • Knowledge.AUTHOR (Server)
Knowledge Manager	• Approves content produced by authors • Publish knowledge documents to be used by agents and customer	• Knowledge.CMS.Approver (CMS) • Knowledge.AUTHOR (Server)
Knowledge Author	• Creates knowledge documents • Creates knowledge categories • Reviews usage feedback and update knowledge content	• Knowledge.CMS.Document.Author (CMS) • Knowledge.CMS.Category.Author (CMS)
Agent	• Handles customers' interactions • Access to public Knowledge bases for this agent is allowed (while disabled in general)	• Knowledge.Worker (WDE) • Knowledge.Author (WDE) • Knowledge.CanAccessPublic (Server)

Assigning a Privilege

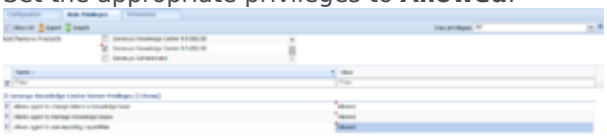
To configure the appropriate privileges for an Agent:

Start

1. Go to **Provisioning** > **Accounts** > Roles.
2. In the taskbar, click **New** to create a new object.
3. Set the name of the role in the **General** section.



4. Go to the **Role Privileges** tab and select the set of roles for Genesys Knowledge Center.
5. Open the list of privileges for Knowledge Center Server.
6. Set the appropriate privileges to **Allowed**.



7. Go back to the **Configuration** tab.
8. In the **Members** section, add the appropriate agent by clicking the **Add** button.

9. Save and Close.

End

Assignining Skills

To configure the appropriate skills for an Agent:

Start

1. Go to **Provisioning** > **Accounts** > **Users**.
2. Select **Agent** from the table
3. Click **Edit...** button
4. Expand Agent Info panel
5. Click **Add...** in the **Skills Level** section

6. In the **Skills Level** dialog:

- select the skill
- enter the skill level
- click OK

7. Save and Close.

End