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Genesys Knowledge Center User's Guide

Using the CMS (8.5.302.xx and earlier)

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Using the CMS (8.5.302.xx and earlier)

Important

You are looking at the documentation for an older version of the product. This page describes the CMS interface available in 8.5.302.xx and earlier versions (up to 8.5.300.xx).

If you are looking for the most recent user guide for CMS please refer to [Using the CMS](#).

Overview

After [logging in](#), you can use the Genesys Knowledge CMS to:

- [Work with Knowledge Base](#) (create, update, and delete knowledge bases)
- [Work with Categories](#) (assign categories to the documents in knowledge base)
- [Work with Documents](#) (create, update, and delete the contents of your knowledge bases by authoring questions and answers)
- [Working with Multilingual Content](#)
- [Export Knowledge base to Knowledge Center Server](#)
- [Work with Customer Feedback](#)

Important

Relations between Knowledge Center Cluster and Knowledge Center CMS:

- Knowledge Base definitions can be created in CMS and exported in Knowledge Center Cluster
- A new Knowledge Base can be activated only using GAX plugin
- Configurable options (Name, Description, Custom fields, attributes, Languages, Channels, Skills) can be exported from CMS to Knowledge Center Server
- Deleting the Knowledge Base in Knowledge Center Server does not affect the CMS
- Data can be Exported or Synchronized from CMS to Knowledge Center Server
- Deleting an article from the CMS also deletes it from Knowledge Center Server (after Synchronization)
- Making changes in Knowledge Center Server does not affect CMS

- Deleting the Knowledge Base in the CMS does not affect Knowledge Center Server (documents or KB will be not deleted)

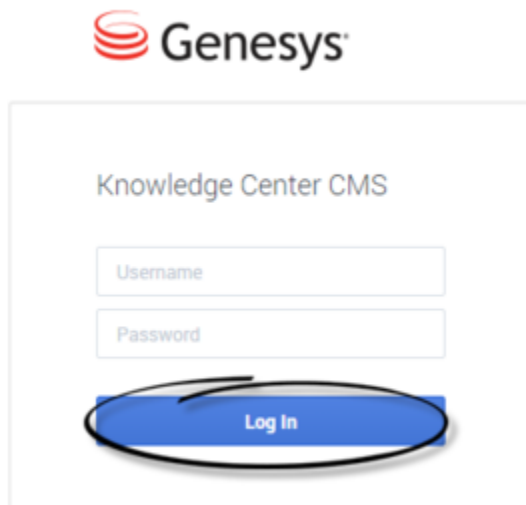
Logging Into the CMS

Prerequisites

- A user with CMS privileges has been created in Config Server.

Start

Enter your username and password and press the **Log In** button.

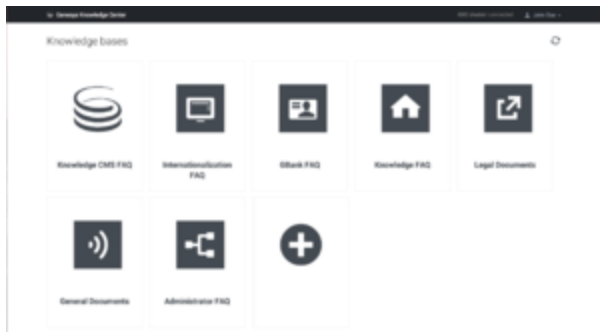


End

Inside of the CMS

Homepage

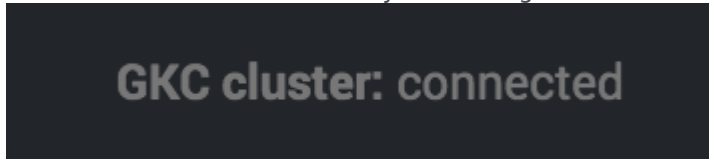
When you log into the CMS you will end up on the home page:



The homepage contains following areas:

1. Top menu:

- a. connection status to the Genesys Knowledge Center Server



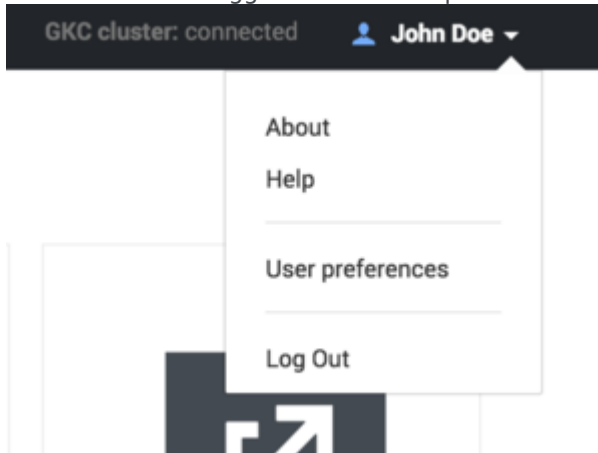
Important

Connection to the Genesys Knowledge Center Server is required for the following operations:

- Export and synchronization
- Processing of the user feedback

These operations are unavailable if the connection status is shown as disconnected. All other operations can be used despite connection status.

- b. the name of the logged in user with personalized menu



3. The main area contains the list of the knowledge bases you have in your CMS and provides the ability to

create a **new knowledge base**.

Inside of the knowledge base

When you navigate inside of a particular knowledge base, a few new elements are added:



1. The top menu now contains additional elements to navigate through the different areas of the knowledge base:
 - Documents - allows seeing the document within the knowledge base
 - Categories - shows the category taxonomy associated with knowledge base
 - Feedback - allows retrieving information about the usage of the knowledge from Genesys Knowledge Center Server

Important

Please ensure that the CMS is connected with Genesys Knowledge Center Server to work with user feedback

- Modifications - recently updated documents that are awaiting synchronization
- Main area contains following elements:
 - current location
 - toolbox panel includes (vary depending on the functionality of particular view)
 - operations that is applicable to the currently selected elements
 - quick filters
 - language selector
 - quick search functionality
 - Table pagination control
 - number of elements shown on the screen
 - navigation between data pages

Working with Knowledge Bases

Creating a New Knowledge Base

Prerequisites

- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the + sign on the main page.



2. Click "Create" link



3. The **Create Knowledge Base** window appears.

On the **General** tab:

- Enter the unique knowledge base ID (the ID should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters).
- Enter knowledge base name (maximum length of 50 characters).
- Enter the Document Type (FAQ or Article).
- (Optional) You can change the default icon assigned to the knowledge base.

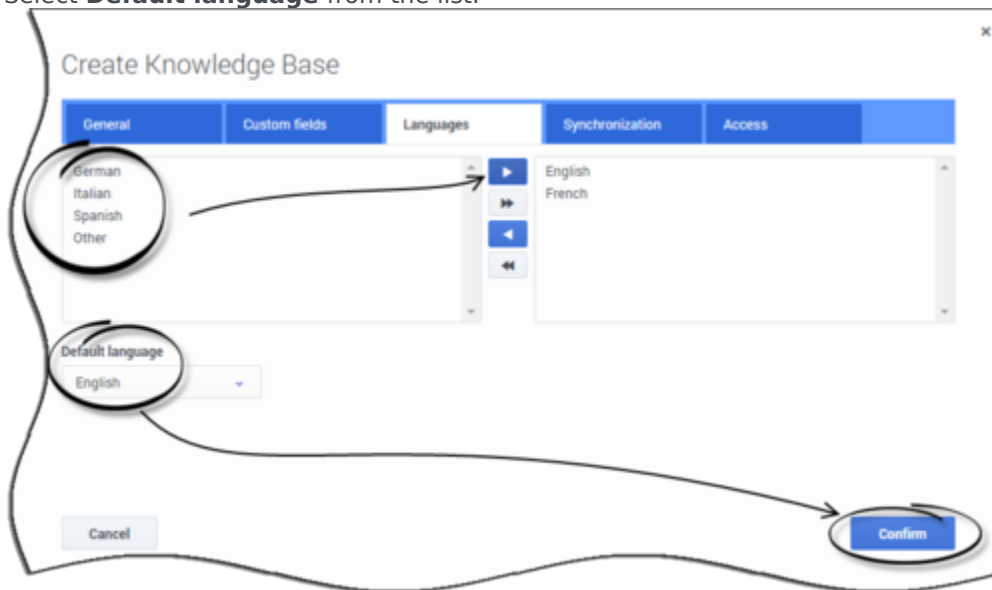
The screenshot shows the 'Create Knowledge Base' dialog box with the 'General' tab selected. The tabs are General, Custom fields, Languages, Channels, Synchronization, and Access. The form contains the following fields:

- * Knowledge Base ID: A text input field.
- * Knowledge Base Name: A text input field.
- Knowledge Base Description: A text area.
- * Document type: A dropdown menu with 'FAQ' selected.
- Knowledge Base Icon: A dropdown menu with 'Genesys' selected, accompanied by a Genesys icon.

At the bottom, there are 'Cancel' and 'Confirm' buttons.

4. To add supported languages to Knowledge Base:

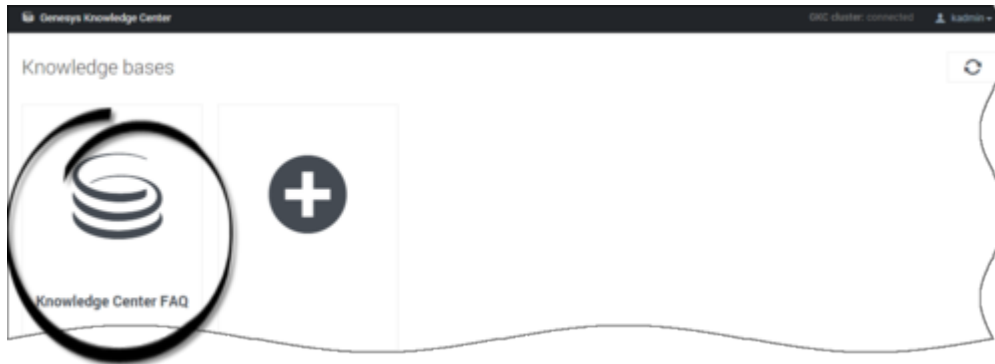
- Click the **Languages** tab.
- Move appropriate languages to the **Selected languages** list.
- Select **Default language** from the list.



Important

The first language added to the knowledge base will become the default language for this knowledge base. It cannot be removed or changed.
More information regarding usage of different languages in the knowledge bases can be found in [Understanding Language Principles](#).

5. Your knowledge base has been created.



End

Deleting a Knowledge Base

Important

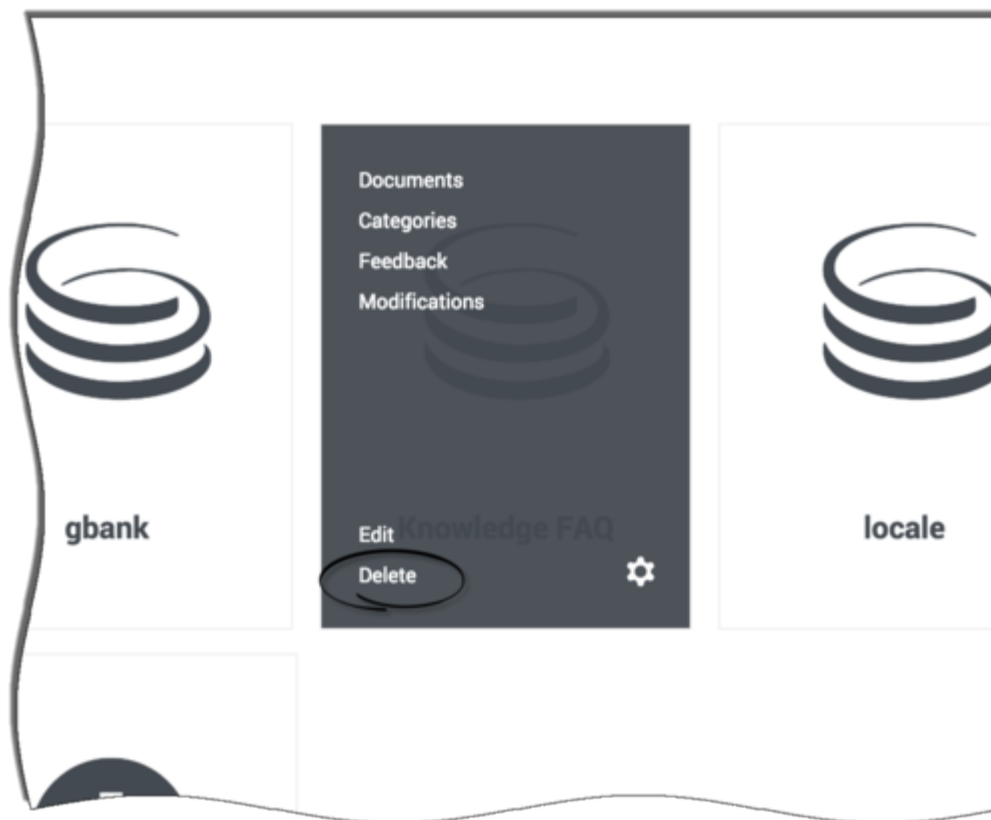
Deleting a Knowledge Base will delete all of the content in that Knowledge Base.

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Delete** and confirm the action in the dialog box.



End

Editing a Knowledge Base Definition

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Edit**.
3. The **Edit Knowledge Base** window appears.

Edit Knowledge Base

General | Custom fields | Languages | Channels | Synchronization | Access

* Knowledge Base ID
knowledgefaq

* Knowledge Base Name
Knowledge FAQ

Knowledge Base Description

* Document type
FAQ

Knowledge Base Icon
Genesys

Cancel Confirm

4. Press **Confirm** to save your changes.

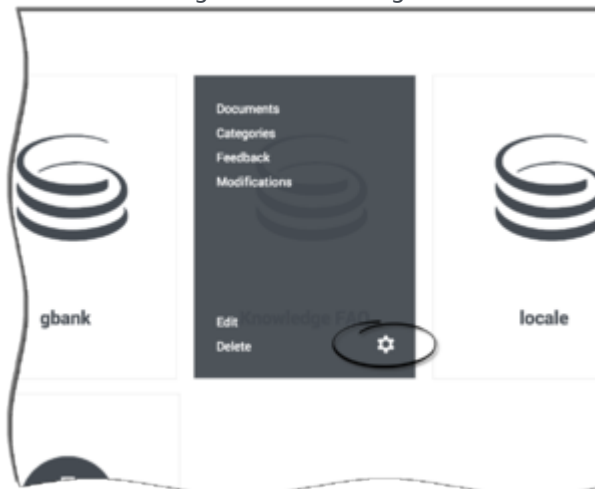
End

Exporting Knowledge Base Configuration

Export of the knowledge base configuration can be useful for backup purposes and to duplicate configuration (via import) to another knowledge base.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page
2. Click the "settings" icon in the right bottom corner



3. From this menu select the **Backup configuration** item



4. Configuration file download will start

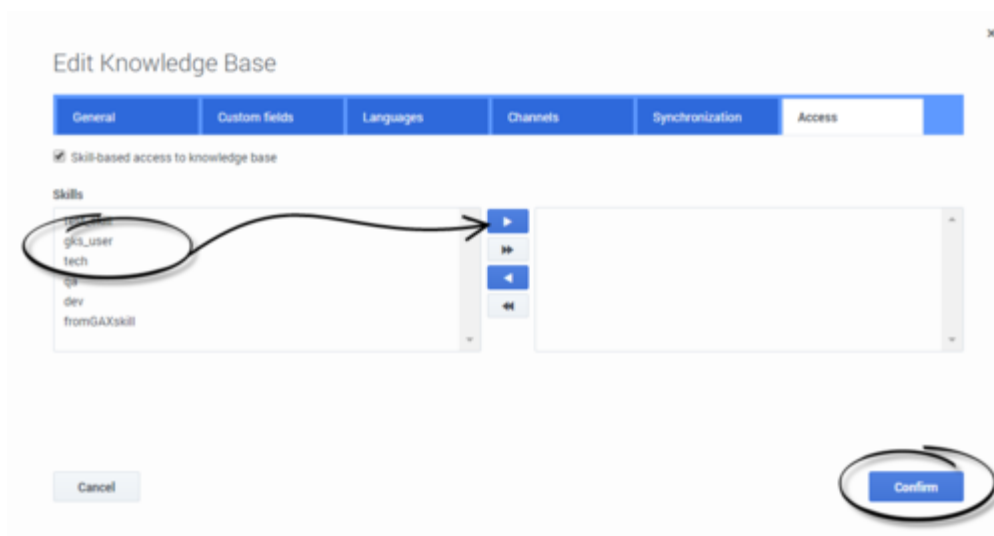
End

Defining Knowledge Base Availability

Use of skills provides the option of refining the data that agents see when they interact with Knowledge Center. Agents will only have access to Knowledge Bases that best match their skills when availability is assigned.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Edit**.
3. The **Edit Knowledge Base** window appears.
4. Click the **Access** tab.
5. Select whether you would like knowledge base to be available for all of your agents or for only the agents that have one of the specified skills.



6. Press **Confirm** to save your changes.

End

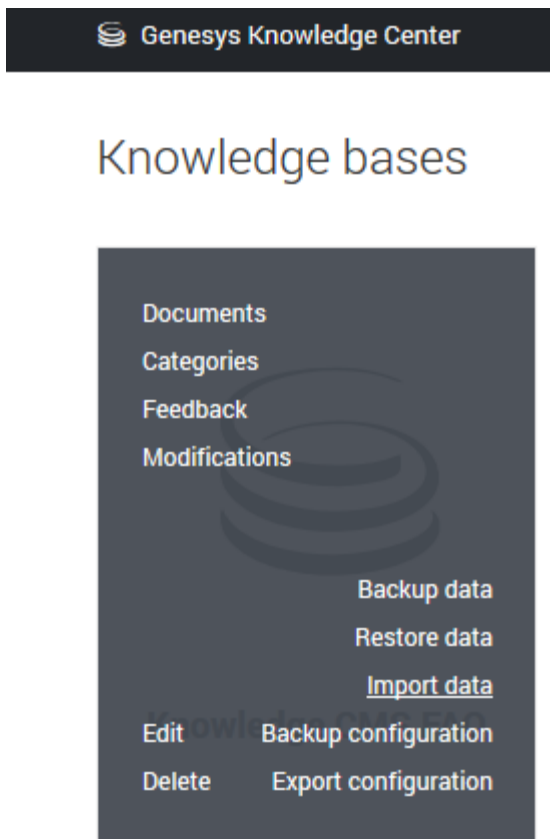
Importing Initial Documents

Prerequisites

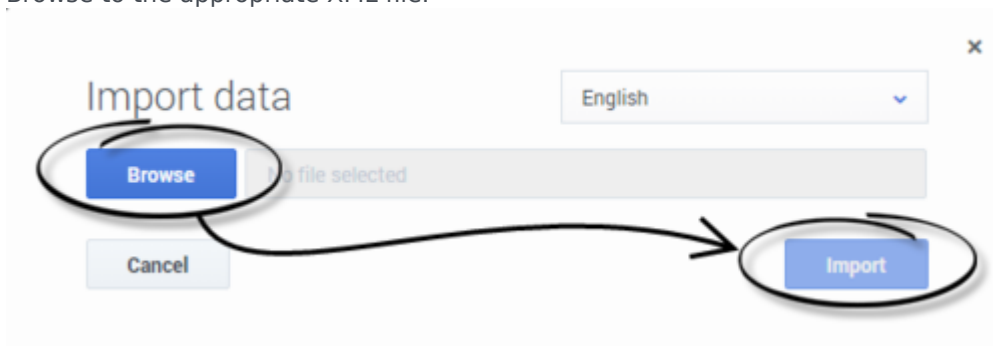
- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Document.Author** or **Knowledge.CMS.Category.Author** privileges have been assigned to the user.
- Files being targeted for import are available in the appropriate format. For more information, please see [Importing Data into the Knowledge Center Server](#)

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.



2. Click **Import data**.
3. Choose Language of content
4. Browse to the appropriate XML file.



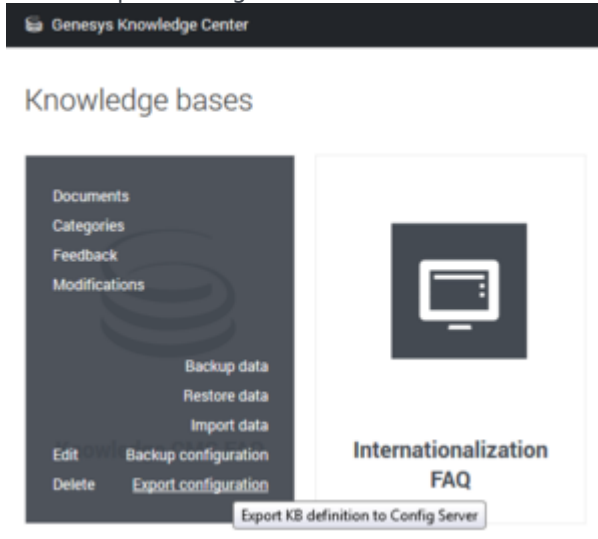
5. Click **Import**; your data is imported into the CMS.

End

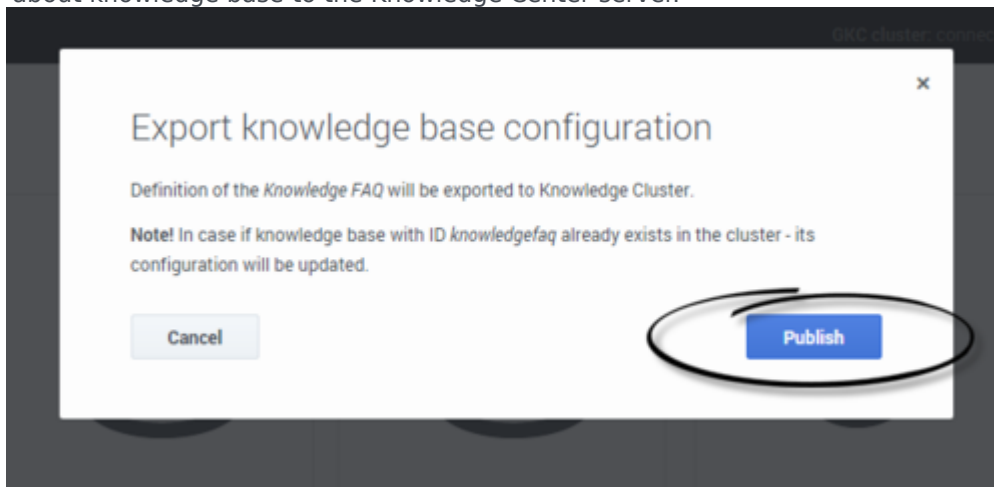
Notify Knowledge Center Server about new Knowledge Base

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click Settings icon in the bottom right corner of knowledge base area.
3. Select Export configuration from the menu



4. The confirmation window appears asking you to confirm that you would like to send the information about knowledge base to the Knowledge Center server.



5. Click the **Publish** button.

Important

The content of the knowledge base will not be sent to the knowledge center server at this step. The CMS will only notify Knowledge Center Server about the existence of the knowledge, its name, id, supported languages, custom attributes and access policy. You can view and edit sent information in the [Administrator Plugin](#).

End

Understanding Language Principles

Knowledge bases can contain content on different languages and their regional versions. You can define as many languages per knowledge base as required. Languages that will be available to be added to the knowledge base is defined by administrator in your environment, Terminology:

- Default language - main language of the knowledge base. Default language cannot be changed as soon as the knowledge base definition has been saved.
- Base language - international version of the language that has regional versions
- Regional language - region-specific version of the base language

Example:

- English is the base language in case if there are regional languages defined for it
- English (US) and English (UK) are regional versions of the English language

Editing List of Languages Within Knowledge Base

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click Edit.
3. The Edit Knowledge Base window appears.
4. Click the Language tab.



5. Move the languages from the available list (on the left) to the selected list (on the right) to add language to the knowledge base or vice versa to remove it.
6. Save your changes or cancel them, using the appropriate buttons.

End

Important

Only regional languages and languages that do not have regional versions are shown in the list of available languages. Base language is automatically added to the knowledge base when at least one regional version of the same language is added, and it is removed when all regional versions are removed.

Example of default, base and regional languages:



English ♦ default
English (United States)
French ♦ base
French (Canada)
French (France)

General principles of editing

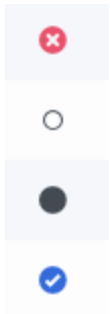
- First version of the category or document must be created in the default language of the knowledge base.
- As soon as a document or a category is created in the default language they can be translated to the other languages or their regional versions.
- Regional version of the document can be created only after the document has been created in the base version of the same language.
- Base version of the document or category is available in the regional version of the same language in case there is no separate regional version of the same document/category.

Approval workflow

Documents and categories shares same approval workflow that consists of 4 states:

- Draft - authoring is in progress
- In Review - category ready for approval review
- Approved - category ready to be published to the server and be used
- Rejected - document has been reviewed and rejected for further editing

Visual indication of these steps are the following (from top to bottom: rejected, draft, in review, approved):

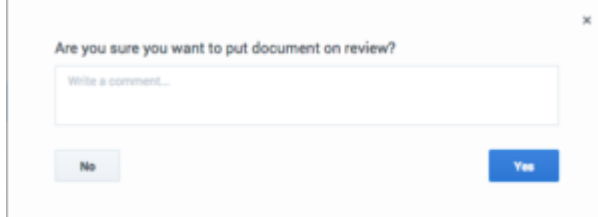


Let's look at an example flow:

1. You have created new category/document - it will have "Draft" status.



2. You can edit and save it multiple times before it reaches final version while still in "Draft" status
 3. You reached the final version and are ready to send it for review; press "Submit the category for review" button and the category/document is now in the "In Review" status
- you can provide a comment for the reviewer to underline changes made and reason for approval.



Important

Comments are visible in the document history only. Comments are not exported into the Genesys Knowledge Center Server and are not visible for agents and customers using the knowledge.

- While reviewing the category/document in "In Review" status you can approve (using "Approve document" button) or reject (using "Reject document" button) the changes and provide your comment(s):



- a. Comment(s) provided by author while sending document for review can be seen on the "Versions" tab of the edit category/document form:



- b. You can change content of the category/document and save it and this document will become a "Draft" document requiring approval flow to be restarted
- Approved category/document is now in approved status and can be published to the Knowledge Center Server for use by agent and customers.

✓ Approved



Important

If you edit and save the approved category/document, its status will change to "Draft" and you need to start the approval flow from the beginning for the new changes while agents and customers can still use the latest approved version of the category/document.

- Rejected category/document is in "Rejected" status and needs to be corrected and sent for approval once more.


✗ Rejected



Let's summarize this into the state diagram:



Changing the document status can be applied individually (as described above) or as the bulk operation:



Category Name	State	Modified
Feedback	○	2019-11-02 01:13:01
Configuration Server	●	2019-11-02 01:13:01
Knowledge Center Server	●	2019-11-02 01:13:01
Server	●	2019-11-02 01:13:01

- select categories/documents from the list
- in the toolbar operation applicable to the selected items will be shown
- click the desired state transition (Put on review, Approve or Reject)
 - selected operation will be applied to the document in the appropriate state only (for example if you select "Put on review" it will be applied to the Draft and Rejected documents in the selection list)

Working with Categories

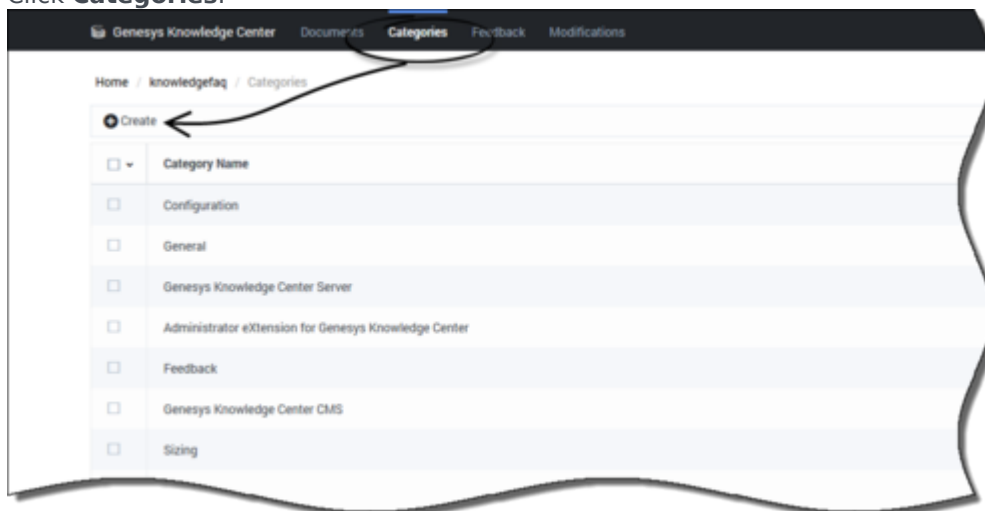
Creating a New Category

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.
- No category has been selected.

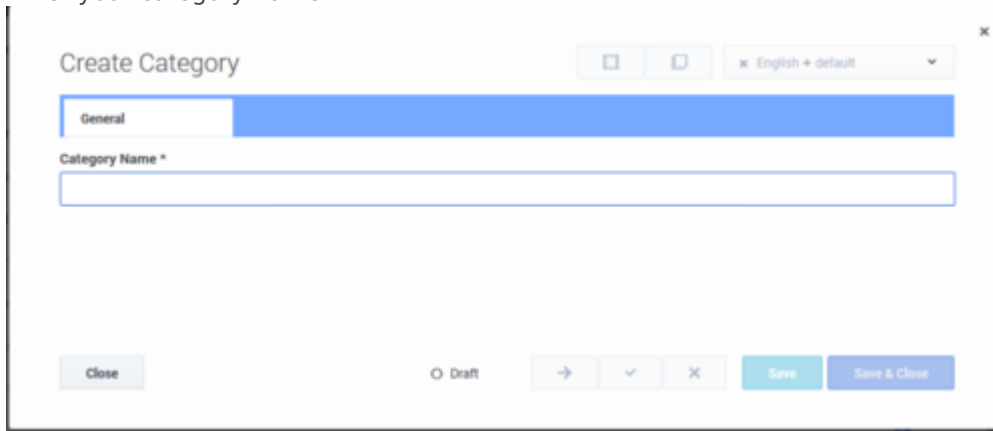
Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.



3. Press the **Create** button.

4. The **Create Category** window appears.
5. Enter your category name.



6. Save your changes or cancel them, using the appropriate buttons.

End

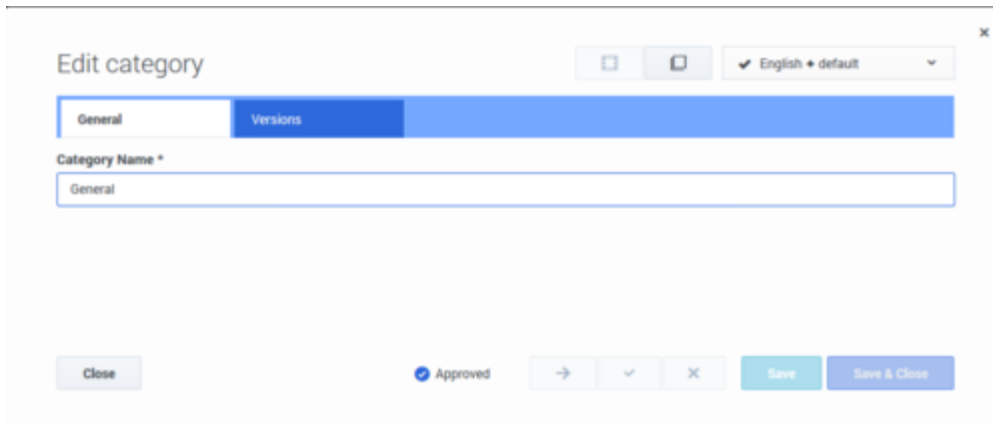
Viewing or Modifying a Category

Prerequisites

- The knowledge base has been defined in the CMS.
- The category has already been created.
- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.
3. Choose your category from the list and click the **Edit** button or double-click the appropriate row.
4. The **Edit Category** window appears.



5. View or browse through the category changes history (using the Versions tab) or make changes in the category name.
6. Save your changes or cancel them, using the appropriate buttons.
7. Every time you make a change, a new version of the category will be created and the new version of the formerly approved category will be given a state of **Draft**.

End

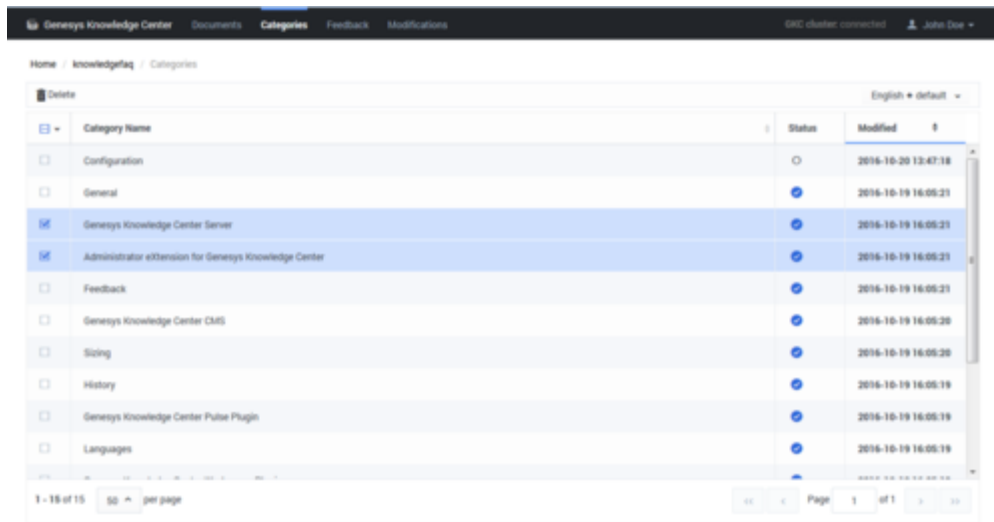
Deleting Categories

Prerequisites

- The knowledge base has been defined in the CMS.
- The category has already been created.
- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.
- A connection to Genesys Knowledge Center is available.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.
3. Select one or more categories from the list.



Category Name	Status	Modified	ID
Configuration		2016-10-20 13:47:18	
General		2016-10-19 16:05:21	
Genesys Knowledge Center Server		2016-10-19 16:05:21	
Administrator extension for Genesys Knowledge Center		2016-10-19 16:05:21	
Feedback		2016-10-19 16:05:21	
Genesys Knowledge Center CMS		2016-10-19 16:05:20	
Sizing		2016-10-19 16:05:20	
History		2016-10-19 16:05:19	
Genesys Knowledge Center Pulse Plugin		2016-10-19 16:05:19	
Languages		2016-10-19 16:05:19	

4. Click the **Delete** button.
5. Confirm your action in the pop-up.

End

Working with Documents

Creating a Document

Prerequisites

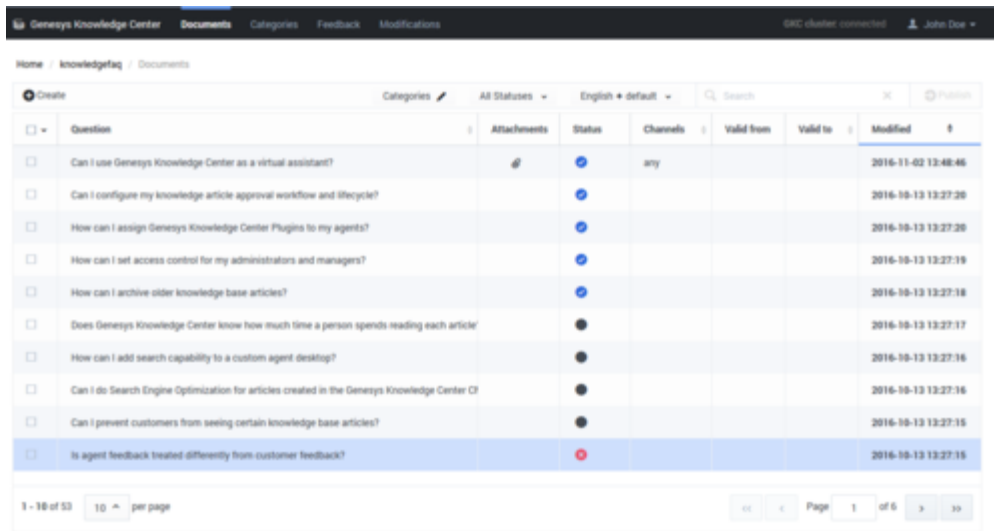
- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Important

The maximum size of attachments is 20MB.

Start

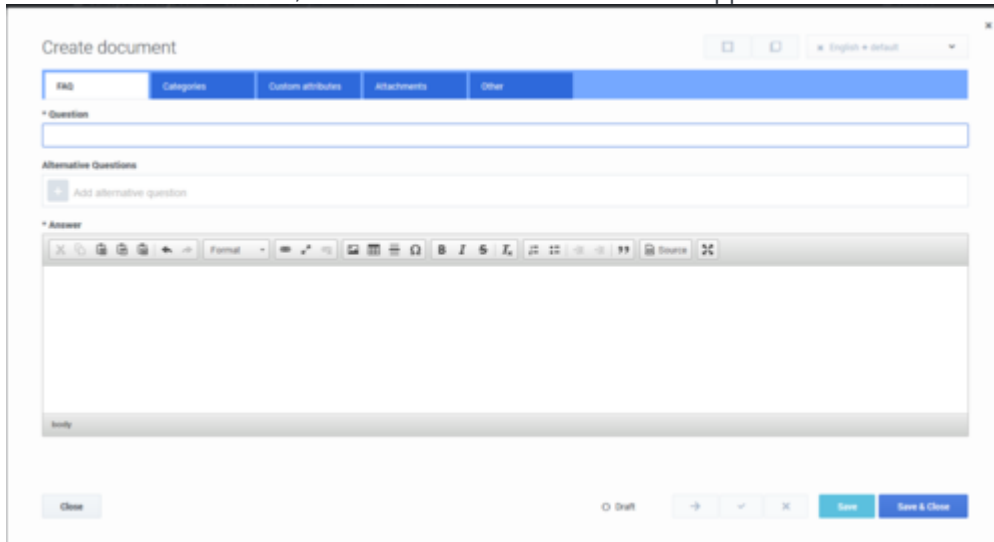
1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.



The screenshot shows the Genesys Knowledge Center interface. At the top, there's a navigation bar with 'Documents', 'Categories', 'Feedback', and 'Modifications'. Below this, a breadcrumb trail shows 'Home > knowledgefaq > Documents'. A 'Create' button is visible on the left. The main area contains a table of documents with columns for checkboxes, Question, Attachments, Status, Channels, Valid from, Valid to, Modified, and a numeric ID. The table lists 10 articles, with the last one, 'Is agent feedback treated differently from customer feedback?', highlighted in blue. At the bottom, there's a pagination control showing '1 - 10 of 53' and '10 per page'.

<input type="checkbox"/>	Question	Attachments	Status	Channels	Valid from	Valid to	Modified	
<input type="checkbox"/>	Can I use Genesys Knowledge Center as a virtual assistant?			any			2016-11-02 13:46:46	
<input type="checkbox"/>	Can I configure my knowledge article approval workflow and lifecycle?						2016-10-13 13:27:20	
<input type="checkbox"/>	How can I assign Genesys Knowledge Center Plugins to my agents?						2016-10-13 13:27:20	
<input type="checkbox"/>	How can I set access control for my administrators and managers?						2016-10-13 13:27:19	
<input type="checkbox"/>	How can I archive older knowledge base articles?						2016-10-13 13:27:18	
<input type="checkbox"/>	Does Genesys Knowledge Center know how much time a person spends reading each article?						2016-10-13 13:27:17	
<input type="checkbox"/>	How can I add search capability to a custom agent desktop?						2016-10-13 13:27:16	
<input type="checkbox"/>	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI?						2016-10-13 13:27:16	
<input type="checkbox"/>	Can I prevent customers from seeing certain knowledge base articles?						2016-10-13 13:27:15	
<input type="checkbox"/>	Is agent feedback treated differently from customer feedback?						2016-10-13 13:27:15	

- Click the **Create** button; the **Create Document** window appears.



The screenshot shows the 'Create document' window. It has a tabbed interface with 'FAQ', 'Categories', 'Custom attributes', 'Attachments', and 'Other'. The 'FAQ' tab is active. It contains a 'Question' field, an 'Alternative Questions' section with an 'Add alternative question' button, and an 'Answer' field with a rich text editor. At the bottom, there are 'Close', 'Draft', and 'Save' buttons.

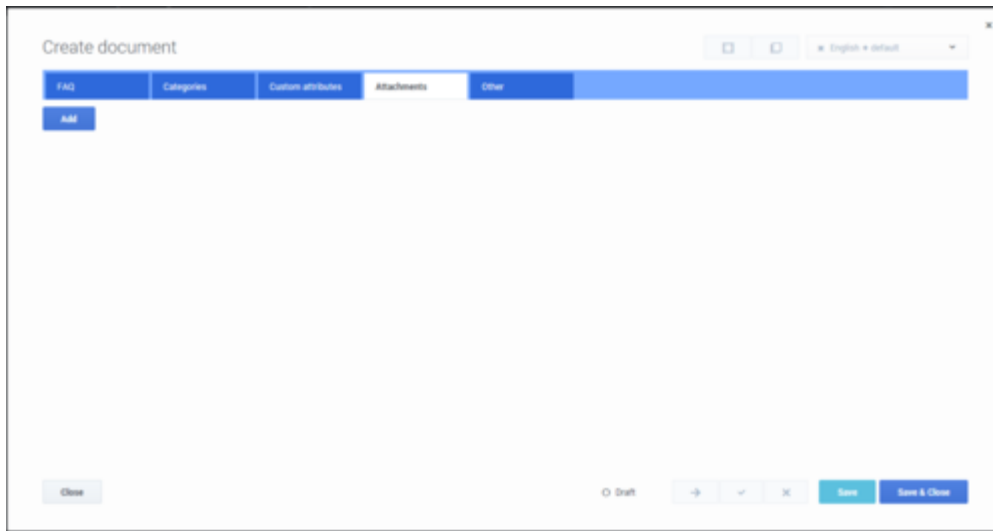
- Fill in the **FAQ** tab by adding **Question** and **Answer** (required) or **Article** tab by adding **Title**, **Summary** and **Description** (required). Add alternative wordings of the question or title (by pressing the + sign in the **Alternative questions** field). Links and images are permitted in the **Answer** and **Description** fields to aid in answer clarity.
- Fill in the **Categories** tab by selecting the appropriate categories from the list on the left and moving them to the right.

The screenshot shows the 'Create document' dialog box with the 'Categories' tab selected. The left pane lists various categories such as 'Administrator extension for Genesys Knowledge Center', 'Archiving', 'Feedback', 'General', 'Integration', 'Languages', 'Rules', and 'Sizing'. The right pane is empty. At the bottom, there are buttons for 'Close', 'Draft', and 'Save & Close'.

6. Fill in the desired **Custom attributes** values.

The screenshot shows the 'Create document' dialog box with the 'Custom attributes' tab selected. The left pane contains three sections: 'Switch, boolean' with a dropdown menu, 'List, list of values' with a dropdown menu, and 'String, string' with a text input field. The right pane contains two sections: 'Date, date' with a date input field and 'Numeric, numeric' with a numeric input field. At the bottom, there are buttons for 'Close', 'Draft', and 'Save & Close'.

7. Add **Attachments** by pressing the **Add** button and then the **Upload** button. To remove attachments, press the **Remove** button.

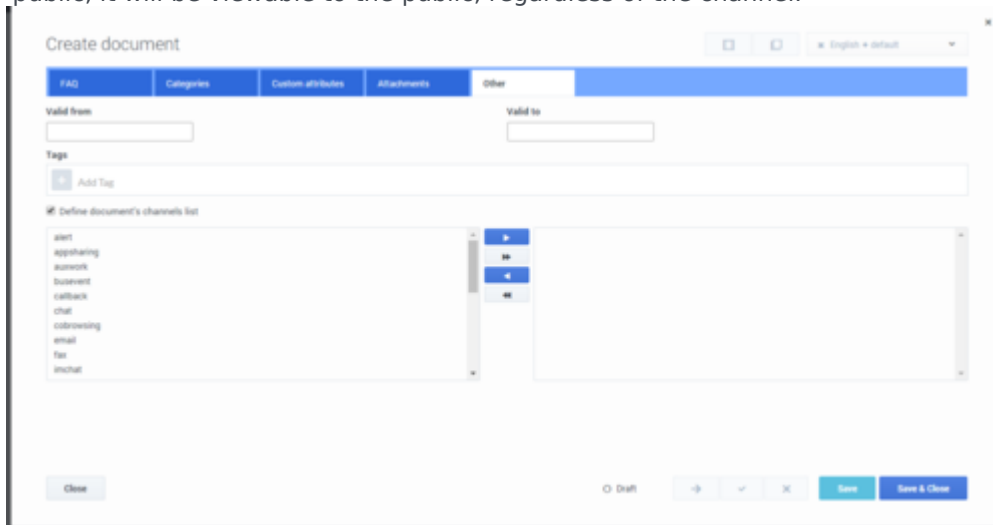


The screenshot shows the 'Create document' dialog box with the 'Attachments' tab selected. The dialog has a title bar with a close button and a language dropdown set to 'English - default'. Below the title bar are tabs for 'FAQ', 'Categories', 'Custom attributes', 'Attachments', and 'Other'. The 'Attachments' tab is active, showing an 'Add' button. At the bottom, there is a 'Close' button, a 'Draft' status indicator, and buttons for 'Save' and 'Save & Close'.

Important

Maximum file size: 20 MB.

8. Fill in the **Other** tab as needed, including channel options which allows you to specify if a document is only for a specific channel type (for example, email only or chat only, or a combination of channels). The channel option is important for the agent experience. If the email attribute is added to content, then only agents that are engaging over email conversations will see that content. The experience would be similar for Chat. By default content is accessible for all agents using any channel. If content is public, it will be viewable to the public, regardless of the channel.



The screenshot shows the 'Create document' dialog box with the 'Other' tab selected. The dialog has the same title bar and tabs as the previous screenshot. The 'Other' tab is active, showing fields for 'Valid from' and 'Valid to', a 'Tags' section with an 'Add Tag' button, and a section titled 'Define document's channels list' with a checkbox that is checked. Below this is a list of channels: alert, appsharing, accounts, business, callback, chat, cobrowsing, email, fax, and mchat. There are buttons for adding and removing channels. At the bottom, there is a 'Close' button, a 'Draft' status indicator, and buttons for 'Save' and 'Save & Close'.

Important

If the content is publicly facing, it will always be visible to customers regardless of the channel attribute.

9. On the Other tab you could add different tags for the documents.
10. "Valid from" option specify the date from which document could be published to server
11. "Valid to" specify the date after which document will be unavailable on server after publication
12. (Optional) Click the **Languages** menu in the top right to create this document in multiple languages. For more information on Creating and editing documents in other languages, see [Working with Multilingual Content](#).
13. Save your changes or cancel them, using the appropriate buttons.

End

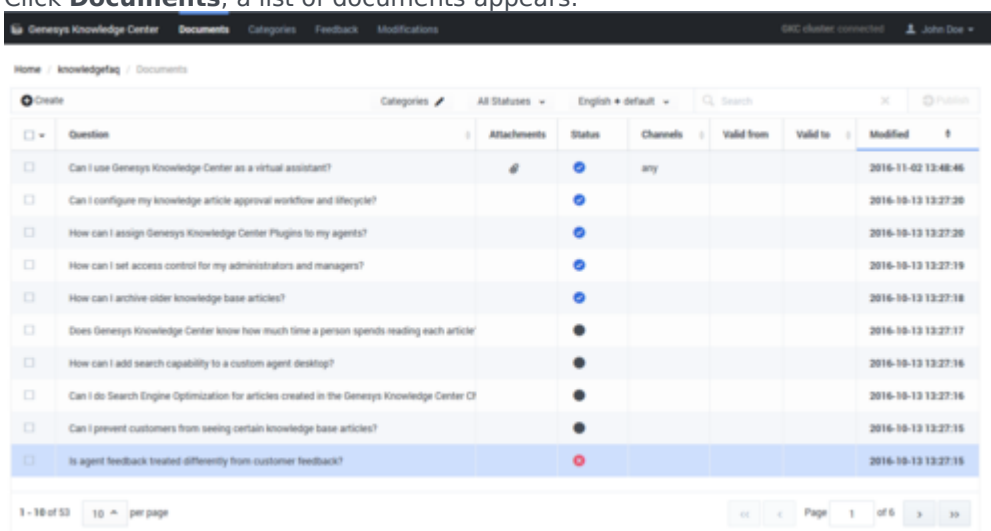
Viewing or Modifying a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- The Document has already been created.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

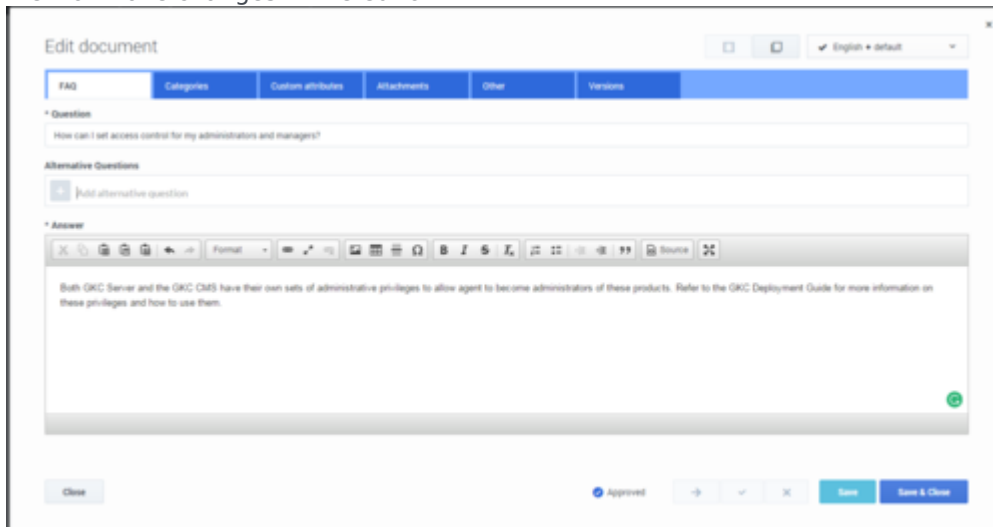
Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.

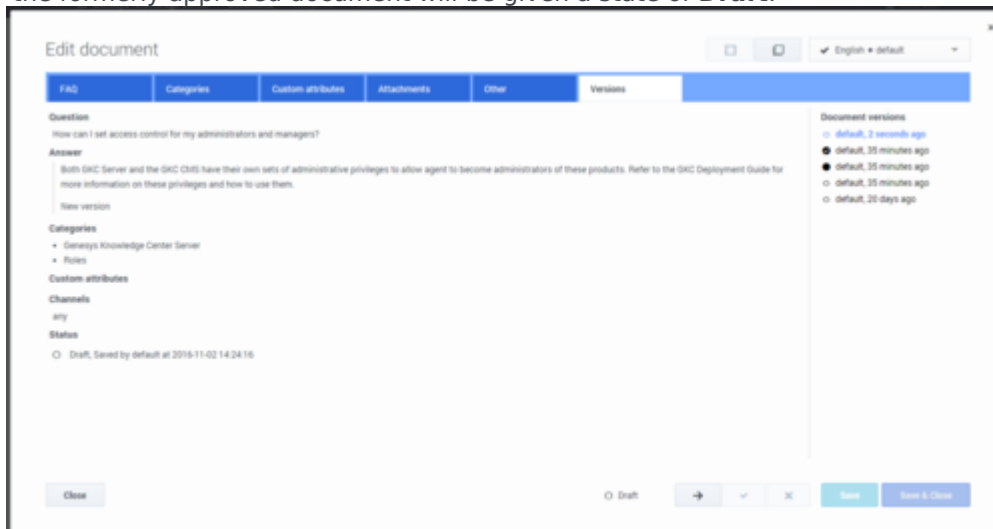


Question	Attachments	Status	Channels	Valid from	Valid to	Modified
Can I use Genesys Knowledge Center as a virtual assistant?		In Progress	any			2016-11-02 13:48:46
Can I configure my knowledge article approval workflow and lifecycle?		In Progress				2016-10-13 13:27:20
How can I assign Genesys Knowledge Center Plugins to my agents?		In Progress				2016-10-13 13:27:20
How can I set access control for my administrators and managers?		In Progress				2016-10-13 13:27:19
How can I archive older knowledge base articles?		In Progress				2016-10-13 13:27:18
Does Genesys Knowledge Center know how much time a person spends reading each article?		Not Started				2016-10-13 13:27:17
How can I add search capability to a custom agent desktop?		Not Started				2016-10-13 13:27:16
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI		Not Started				2016-10-13 13:27:16
Can I prevent customers from seeing certain knowledge base articles?		Not Started				2016-10-13 13:27:15
Is agent feedback treated differently from customer feedback?		Not Started				2016-10-13 13:27:15

3. Choose a Document from the list and double-click the appropriate row.
4. View or make changes in the editor.



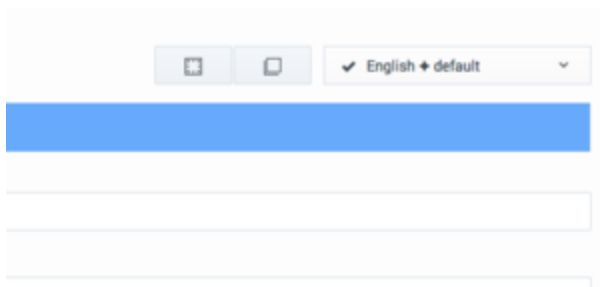
5. Save your changes or cancel them, using the appropriate buttons.
6. Every time you make a change, a new version of the document will be created and the new version of the formerly approved document will be given a state of **Draft**.



End

Copying content from one document version to another

You can copy content of one document version to the version of document in another language



Start

1. Open source version of document
2. Press Copy document button
3. Switch to destination document version or version of document in new language
4. Press Paste document button
5. Edit and Save document

End

Important

After copy all content except of Attachments will be duplicated to new document. Attachments should be added manually.

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.

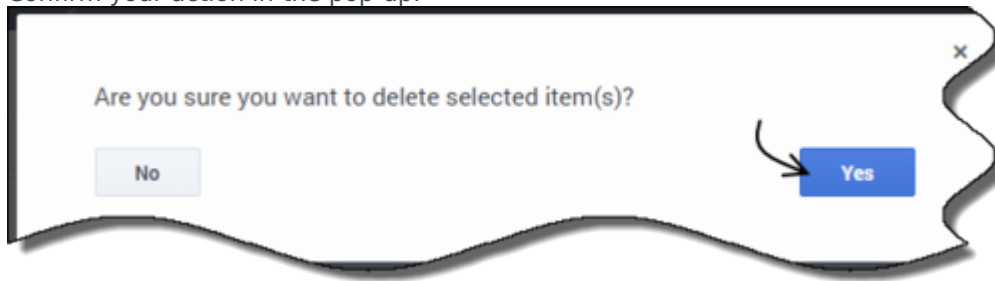
Important

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.

Start

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.



End

View document rating

To view overall rating of document use "Feedback" tab inside document edit window. **Start**

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click Documents.
3. Choose your document from the list and click the Edit button or double-click the appropriate row.
4. Switch to Feedback tab



End

Working with Multilingual Content

To review Knowledge Base content in different languages, simply select the appropriate language from the list located in the toolbar and the language selection displays a list of documents or categories in the selected language. If a document has no version in regional language, version in base language will be displayed. If a document was not defined in the selected base language, version from default language will be displayed and it is then grayed out.

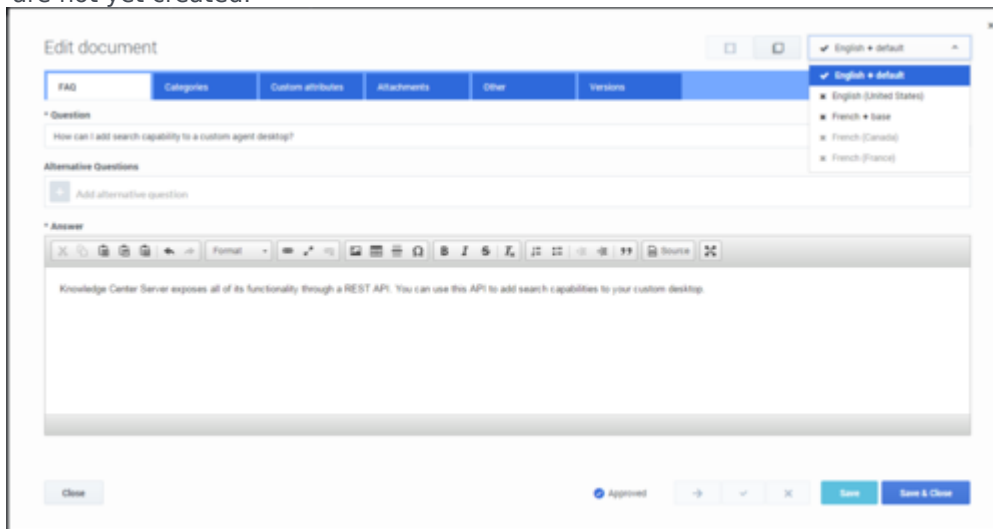
Creating a new language version of a document

Prerequisites:

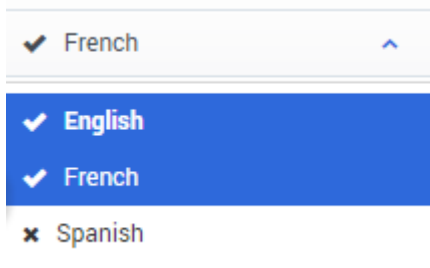
- If you are not currently in the document where you wish to add a new language, select the document from the list of documents and click **Edit**.

Start

1. From the Language list on the right, you can view a list of available languages. Languages with a check mark denote documents which are currently available. Languages with an X denote documents which are not yet created.



2. Click the specific language with an X to create the new document in that language.
3. Update appropriate fields.
4. Save changes.
5. Once approved, the language displays a check mark.



End

Publishing Knowledge base to Knowledge Center Server

Publishing selected documents

Important

Only approved documents and categories will be published to the Knowledge Center Server. If the current version of a document is not approved, the latest approved version will be published.

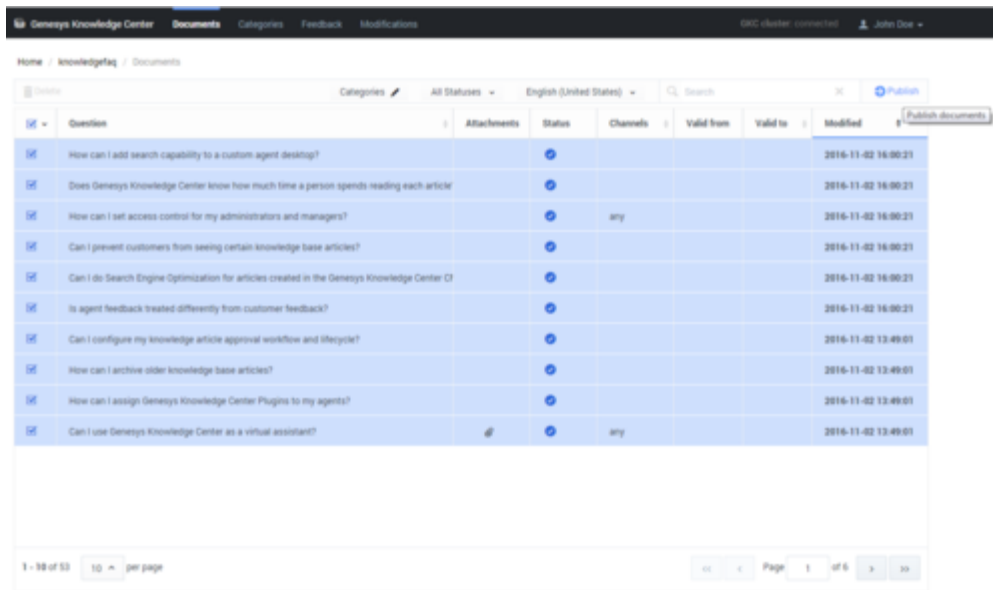
Documents can be published from base language if no regional languages have been configured. If regional languages are configured for base language, documents should be published directly from regional languages. If there is no regional version for a document, the version from base language will be published instead.

Prerequisites

- The knowledge base has been defined in the CMS.
- The categories have already been created and approved.
- Your Documents have been created and approved.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Approver** privileges have been assigned to the user.
- **Knowledge.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**.
3. Using the check boxes, select the document(s) you wish to publish or leave all documents unchecked to publish them all.
4. Click the **Publish** button.
5. All approved documents from the CMS are exported into Genesys Knowledge Center Server.



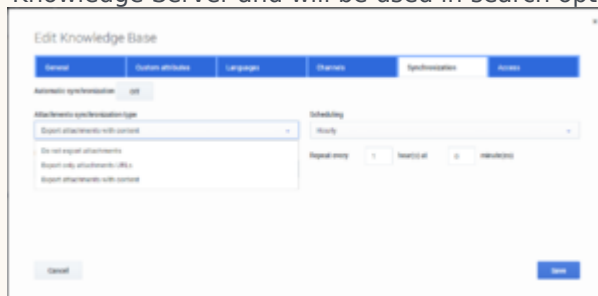
Question	Attachments	Status	Channels	Valid from	Valid to	Modified
How can I add search capability to a custom agent desktop?		✓				2016-11-02 16:00:21
Does Genesys Knowledge Center know how much time a person spends reading each article?		✓				2016-11-02 16:00:21
How can I set access control for my administrators and managers?		✓	any			2016-11-02 16:00:21
Can I prevent customers from seeing certain knowledge base articles?		✓				2016-11-02 16:00:21
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CI?		✓				2016-11-02 16:00:21
Is agent feedback treated differently from customer feedback?		✓				2016-11-02 16:00:21
Can I configure my knowledge article approval workflow and lifecycle?		✓				2016-11-02 13:49:01
How can I archive older knowledge base articles?		✓				2016-11-02 13:49:01
How can I assign Genesys Knowledge Center Plugins to my agents?		✓				2016-11-02 13:49:01
Can I use Genesys Knowledge Center as a virtual assistant?		✓	any			2016-11-02 13:49:01

End

Important

To publish attachments with documents the following option in Knowledge base settings should be configured:

1. go to Edit Knowledge base
2. switch to Synchronization tab
3. select "Attachments synchronization type" and choose the appropriate option:
 - Do not export attachment
 - Export only attachments URLs (attachments will be available for download in Knowledge Server, but not used in search optimization)
 - Export attachments with content (attachments will be available for download in Knowledge Server and will be used in search optimization if possible)



For the correct upload of attachments, in the Application Cluster option **externalURL** in section **cms.general** should point correctly to CMS. For example:

`http://<cms host>:<cms port>/gks-cms`

Setting up automatic synchronization

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Edit**.
3. The **Edit Knowledge Base** window appears.
4. Click the **Synchronization** tab.
5. Click the **Automatic synchronization** box to turn it **On**.
6. Choose the following options:
 - attachment synchronization type
 - list of languages to be synchronized
 - set scheduling:
 - One time - to synchronize once
 - Daily - to synchronize every N hours
 - Weekly - to synchronize on the defined days of week
 - Monthly - to synchronize on defined days of month

The screenshot shows the 'Edit Knowledge Base' window with the 'Synchronization' tab selected. The window has a title bar with a close button (X). Below the title bar is a tabbed interface with tabs for 'General', 'Custom attributes', 'Languages', 'Channels', 'Synchronization', and 'Access'. The 'Synchronization' tab is active. Inside this tab, there is a section for 'Automatic synchronization' with a toggle switch set to 'Off'. Below this is a section for 'Attachments synchronization type' with a dropdown menu showing 'Export attachments with content'. To the right of this is a 'Scheduling' section with a dropdown menu showing 'Hourly'. Below the scheduling dropdown is a 'Repeat every' section with input fields for '1' hour(s) and '0' minute(s). At the bottom left is a 'Cancel' button and at the bottom right is a 'Save' button. There is also a 'Languages' section with a dropdown menu showing 'All languages' and a pencil icon for editing.

7. Press **Confirm** to save your changes.

End

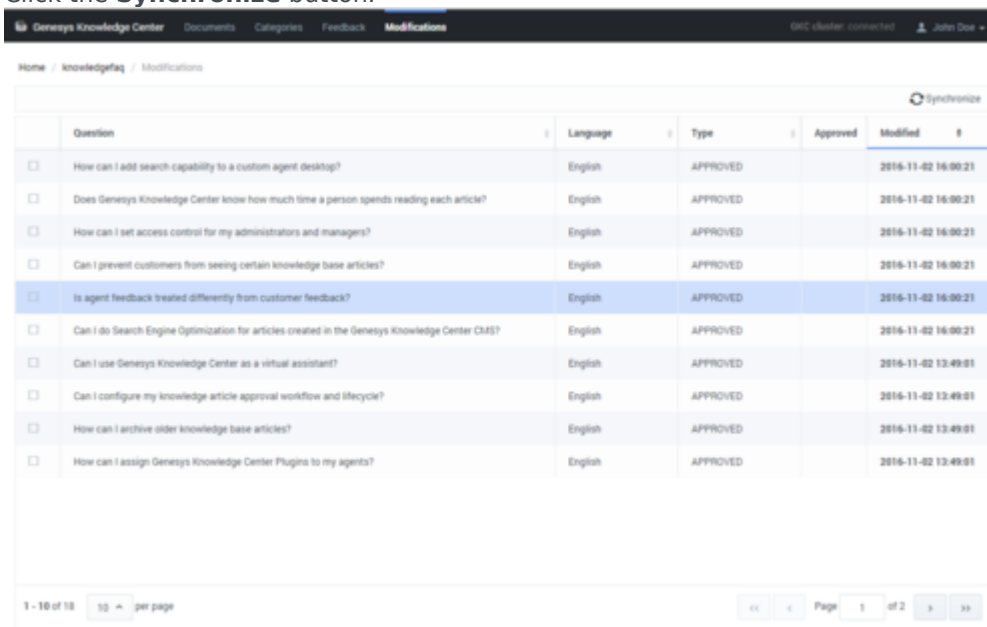
Synchronizing recent changes

Prerequisites

- A connection to the Knowledge Base must be available
- **Knowledge.CMS.Approver** privileges have been assigned to the user.

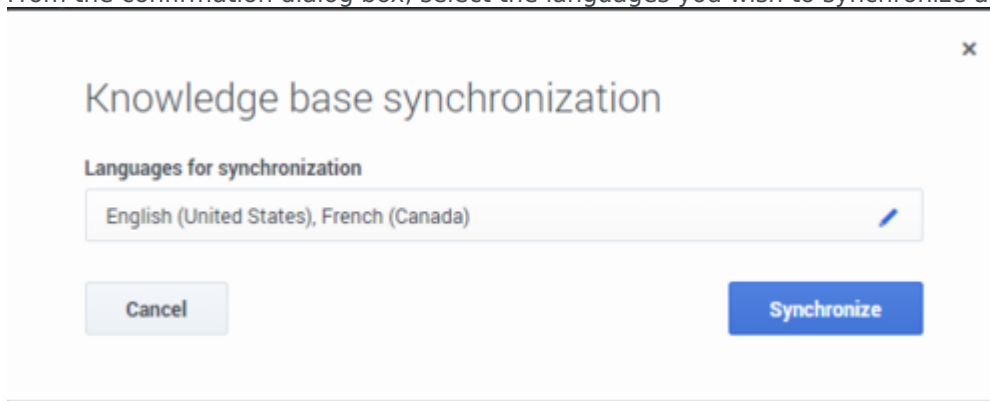
Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Modifications** from the side menu to see a list of documents that have been modified since the last synchronization.
3. Click the **Synchronize** button.



	Question	Language	Type	Approved	Modified	
<input type="checkbox"/>	How can I add search capability to a custom agent desktop?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Does Genesys Knowledge Center know how much time a person spends reading each article?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	How can I set access control for my administrators and managers?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I prevent customers from seeing certain knowledge base articles?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Is agent feedback treated differently from customer feedback?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	English	APPROVED		2016-11-02 16:00:21	
<input type="checkbox"/>	Can I use Genesys Knowledge Center as a virtual assistant?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	Can I configure my knowledge article approval workflow and lifecycle?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	How can I archive older knowledge base articles?	English	APPROVED		2016-11-02 13:49:01	
<input type="checkbox"/>	How can I assign Genesys Knowledge Center Plugins to my agents?	English	APPROVED		2016-11-02 13:49:01	

4. From the confirmation dialog box, select the languages you wish to synchronize and click **Synchronize**.



Knowledge base synchronization

Languages for synchronization

English (United States), French (Canada)

Cancel Synchronize

When the synchronization process completes, the list of modifications is then updated.

End

Working with Customer Feedback

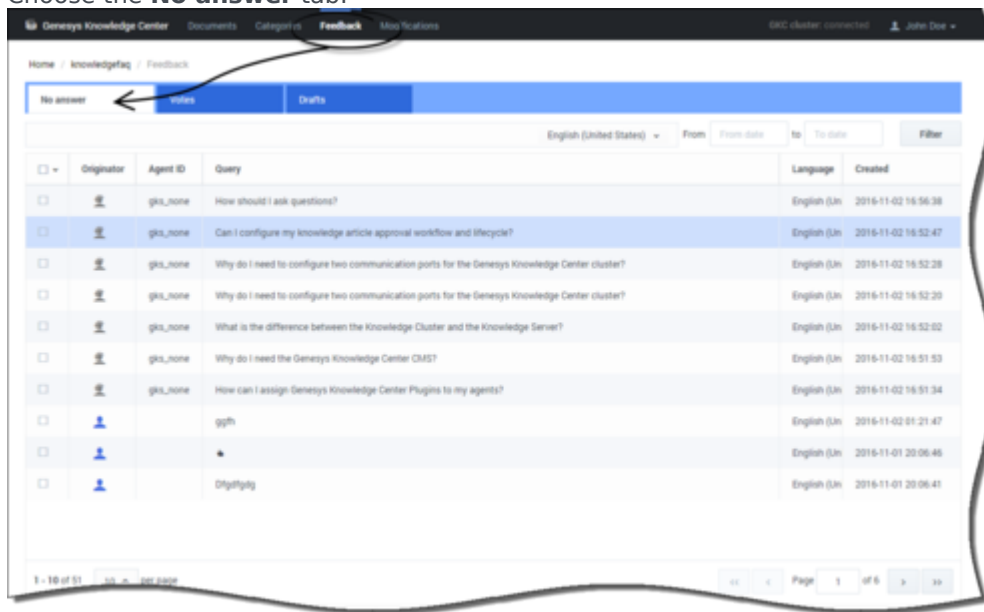
Processing a "No answer" Item

Prerequisites

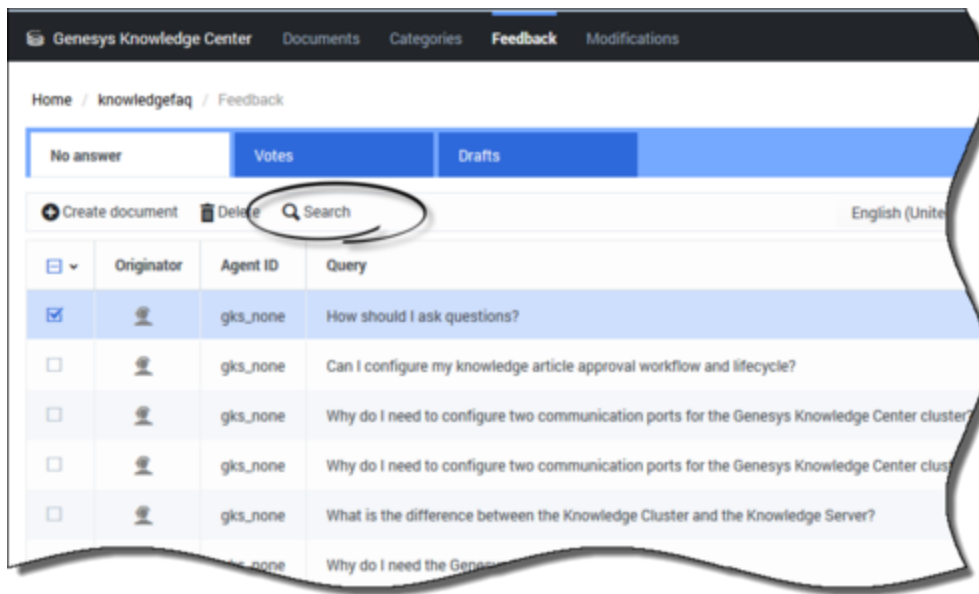
- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.
- **Knowledge.Author** privileges have been assigned to the user.

Start

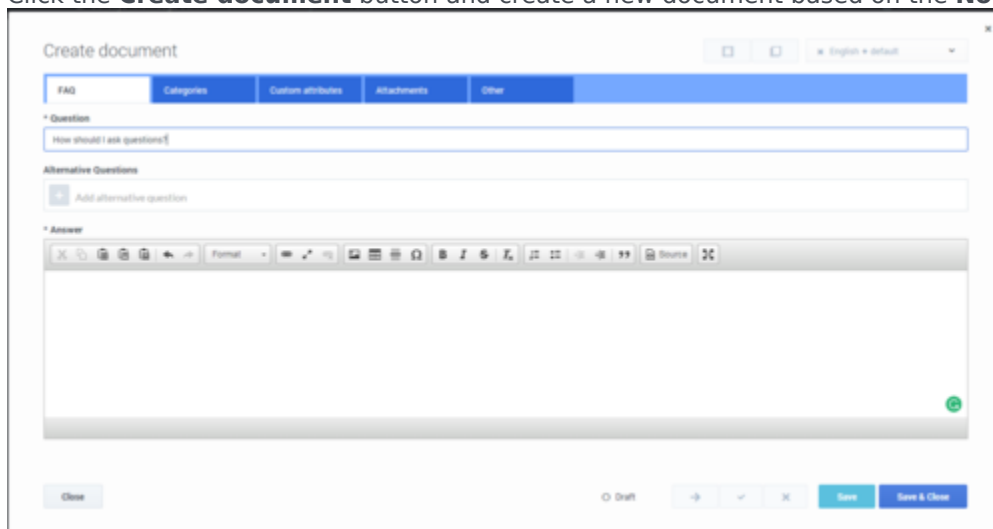
1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **No answer** tab.



4. Choose one or more items from the list.
5. Process each item:
 - Search for similar existing questions using the **Search** button.



- Click the **Create document** button and create a new document based on the **No answer** item.



- Delete unnecessary items using the **Delete** button.

End

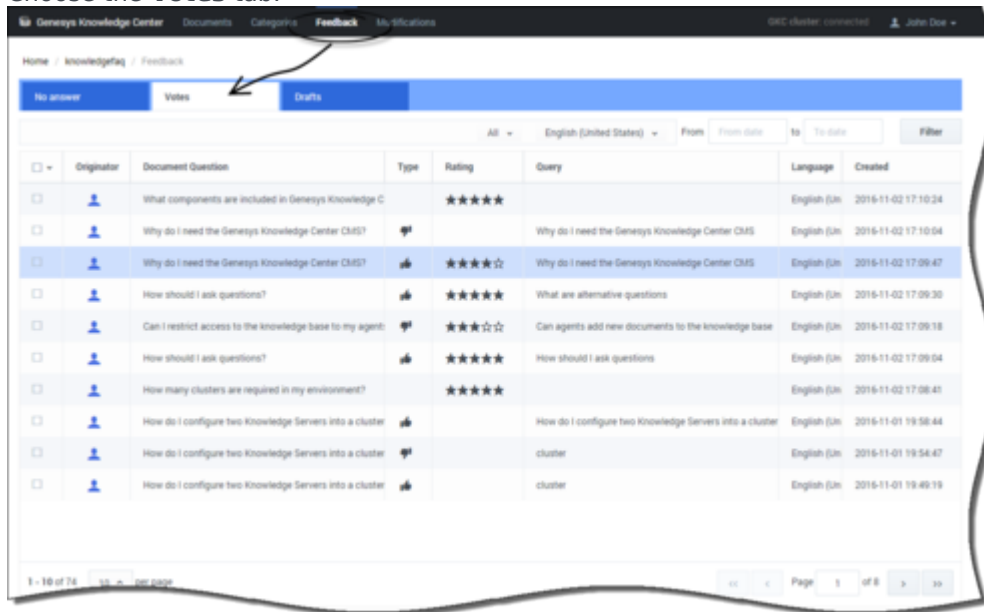
Processing Votes

Prerequisites

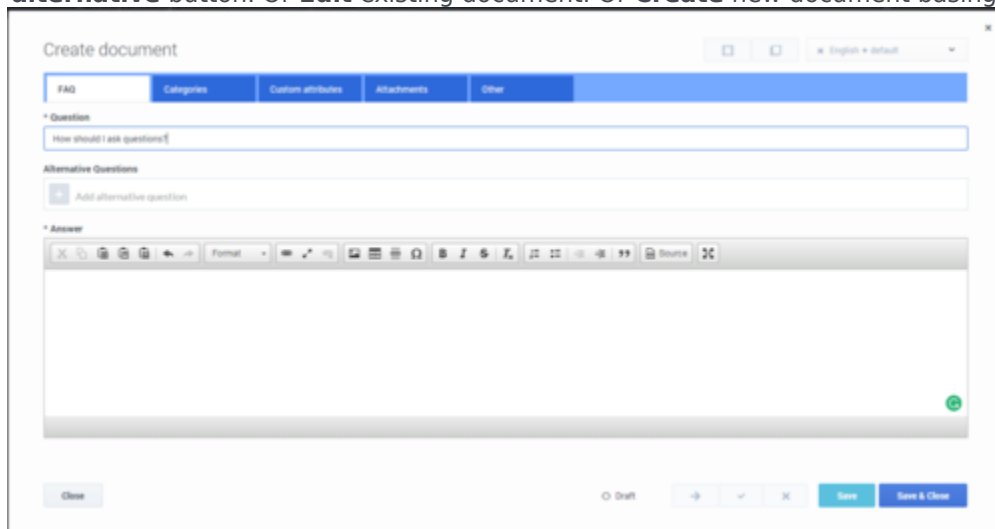
- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **Votes** tab.



4. Choose one or more items from the list.
5. Process each item:
 - Add a search query as an alternative question for the upvoted document using the **Add as alternative** button. Or **Edit** existing document. Or **Create** new document basing on search query.



- Delete appropriate items using the **Delete** button.

End

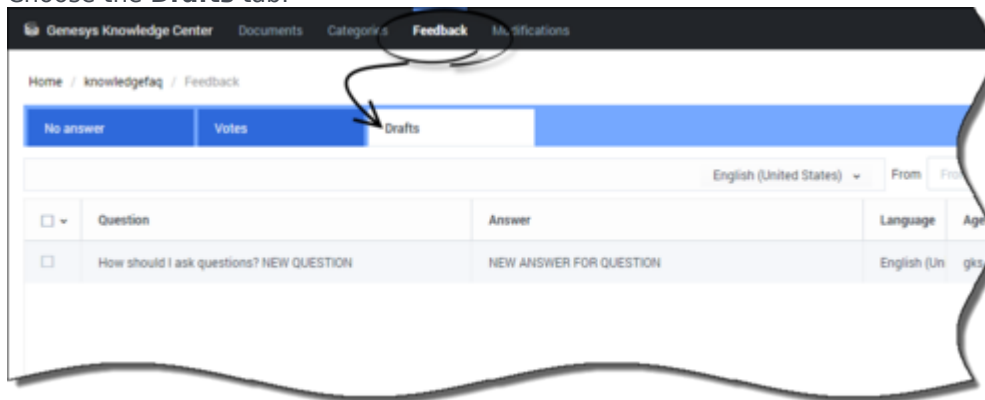
Processing Drafts

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **Drafts** tab.



4. If any drafts are awaiting review, they are present under this tab.
5. Process each item: **Create** new document or **Reject** draft

End