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Genesys Knowledge Center User's Guide

Working with Documents

5/5/2025

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Working with Documents

Displaying documents

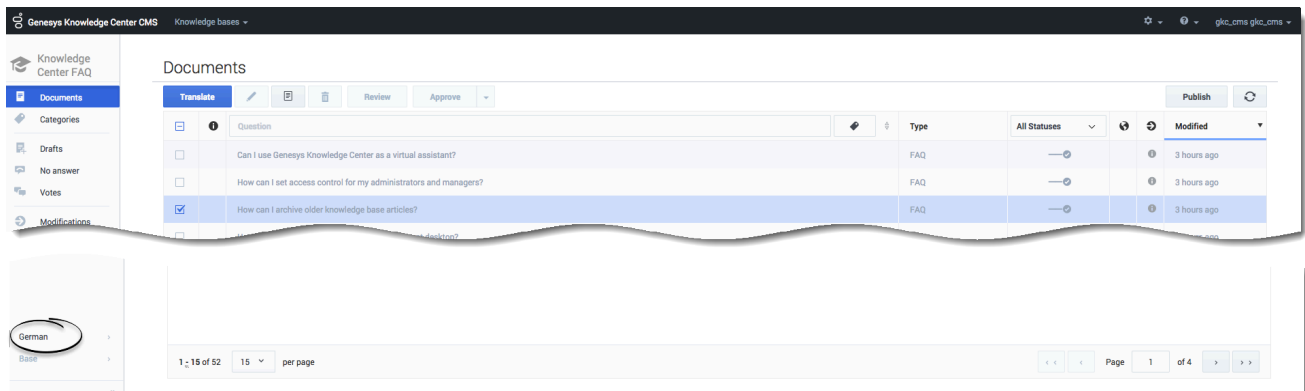
Select a knowledge base to display a list of its contents. If you select the default language, you can create documents and categories:

The screenshot displays the Genesys Knowledge Center CMS interface. The top navigation bar includes the Genesys logo, "Genesys Knowledge Center CMS", and dropdown menus for "Knowledge bases" and "Dictionaries". The user "John Doe" is logged in. The left sidebar shows a navigation menu with "Knowledge Center FAQ", "Dashboard", "Documents" (selected), "Categories", "No answer", "Votes", "Drafts", and "Modifications". At the bottom of the sidebar, "English" and "Base" are listed with expandable arrows.

The main content area is titled "Documents". It features a toolbar with "Create", "Review", "Approve", and "Publish" buttons. Below the toolbar is a table of documents. The table has columns for a checkbox, a question, a type (FAQ), a status indicator (a green checkmark in a red circle), and a "Modified" timestamp. The table lists 15 documents, with the last one truncated. At the bottom of the table, there is a pagination bar showing "1 - 15 of 52", a dropdown for "15" items per page, and page navigation controls.

	Question		All Statuses		Modified
<input type="checkbox"/>	Can I store knowledge articles in different languages?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	How do I import data into my knowledge base?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	Is agent feedback treated differently from customer feedback?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	Should I let Genesys Knowledge Center Server know how many answers a user viewed?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	Why is the correct answer shown as the second item in the list of answers?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	What is the difference between the Knowledge Cluster and the Knowledge Server?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	What is a knowledge base?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	Can I use Genesys Knowledge Center as a virtual assistant?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	How are attachments used in finding the right answer to a question?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	How can I add search capability to a custom agent desktop?	FAQ		✓	1 seconds ago
<input type="checkbox"/>	What Is Genesys Knowledge Center?	FAQ		✓	1 minute ago
<input type="checkbox"/>	How does Genesys Knowledge Center find the right answers to my questions?	FAQ		✓	1 minute ago
<input type="checkbox"/>	What is the Sample UI?	FAQ		✓	1 minute ago
<input type="checkbox"/>	Why do I need the Genesys Knowledge Center CMS?	FAQ		✓	2 minutes ago
<input type="checkbox"/>	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Cente...	FAQ		✓	2 hours ago

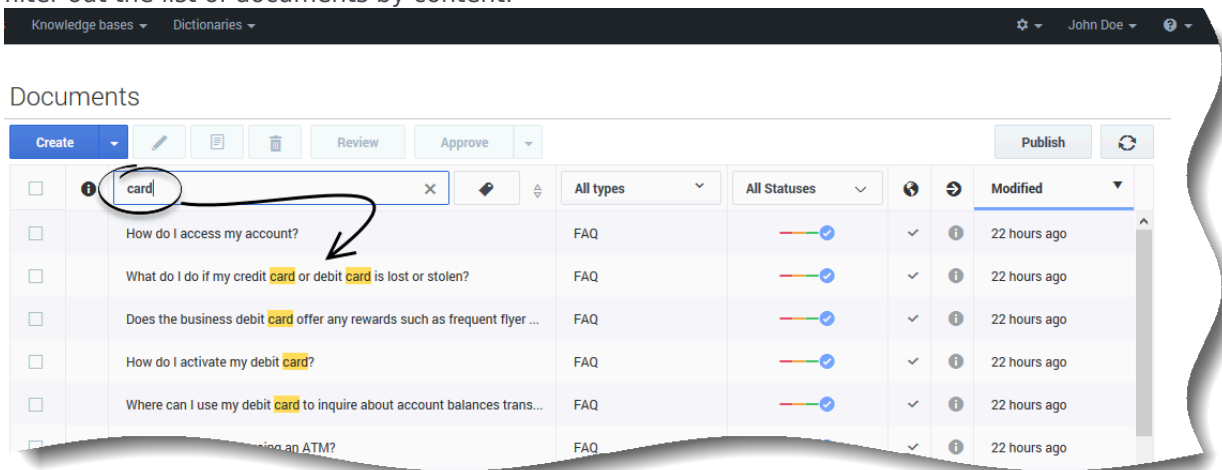
If you select any other language, you can translate an existing document or category into the selected language:



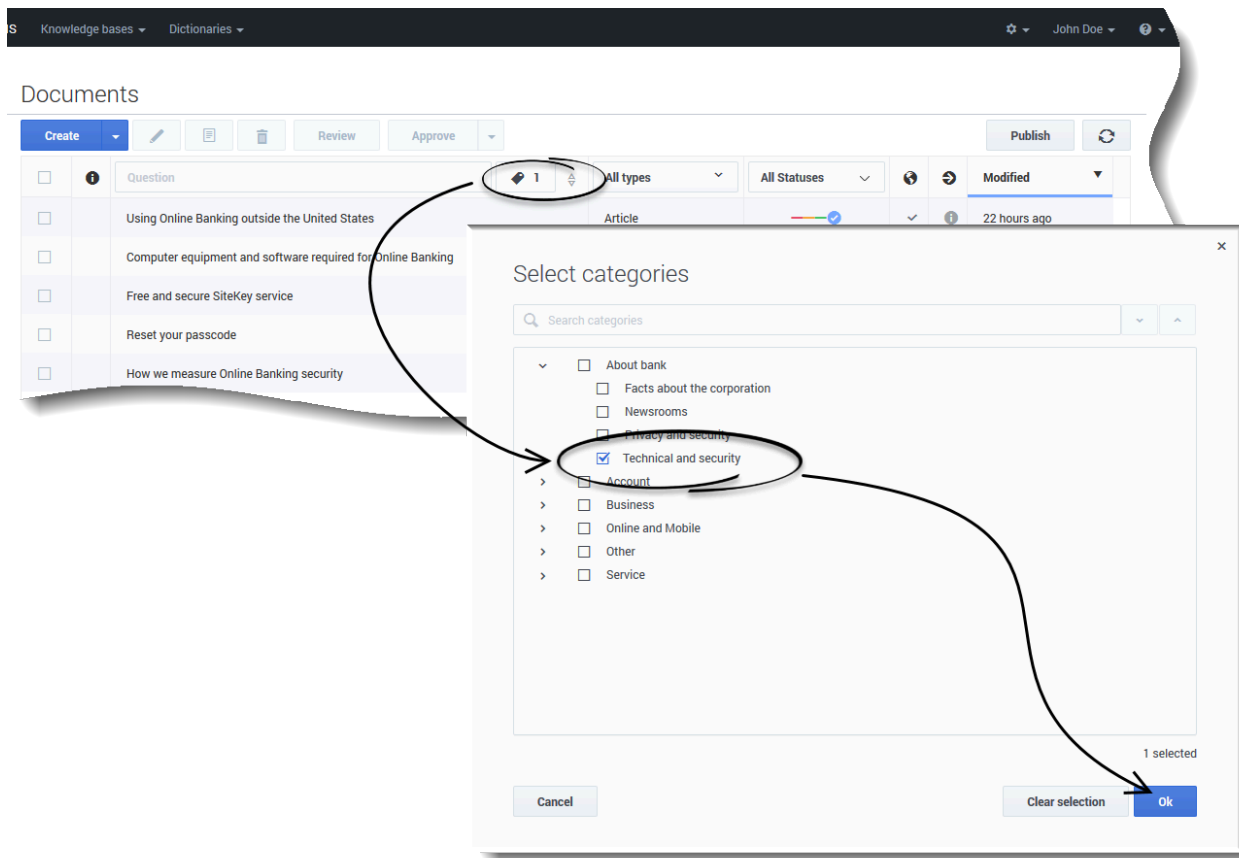
Filtering list of documents

From the list of documents you can:

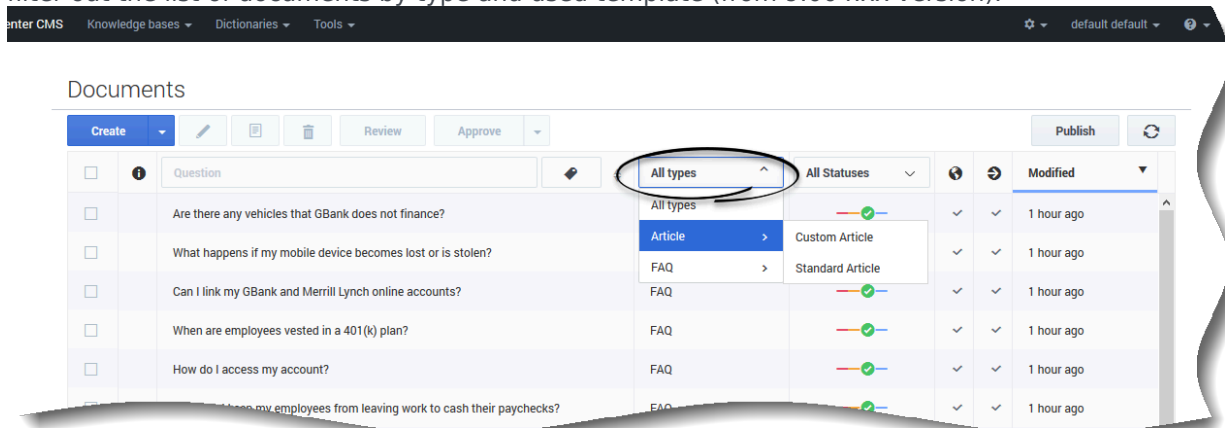
- filter out the list of documents by content:



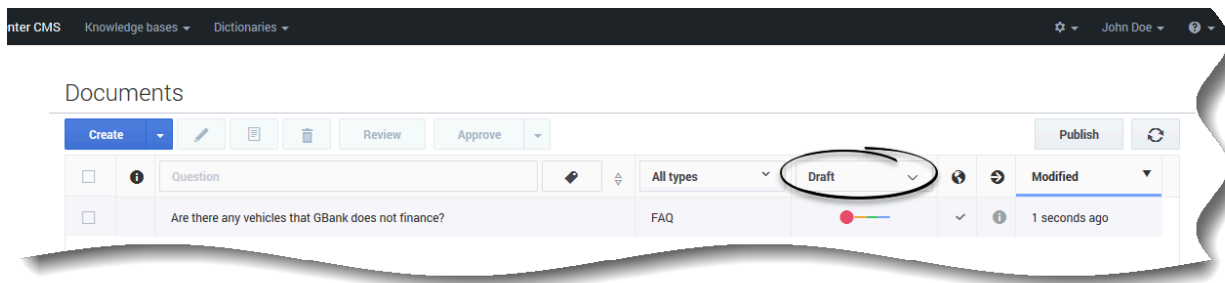
- filter out the list of documents by category:



- filter out the list of documents by type and used template (from 9.004.xx version):



- filter out the list of documents by current status:

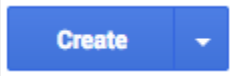
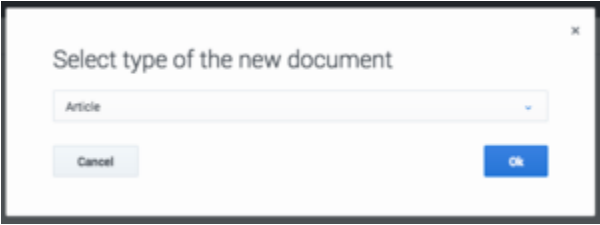
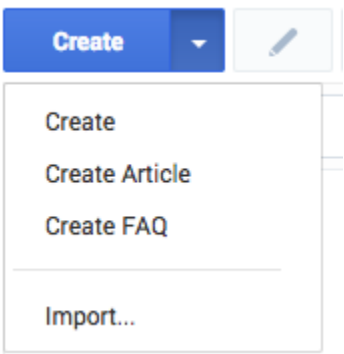



- sort the template list by:
 - document name
 - modification date

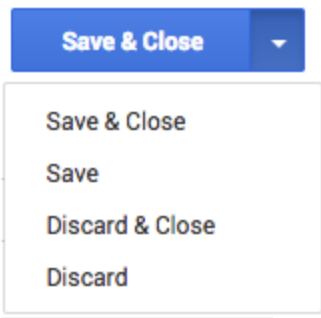

The final 2 columns display:


- 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

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

	<p>Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.</p>
<p>Alternative Questions</p> <p>Add alternative question</p> <p>Tags</p> <p>Genesys Knowledge Center CMS Add Tag</p>	<p>*Optional</p> <p>Enter values in Alternative Question and Tags fields by typing in a value and then pressing "Enter" to create the new entity.</p>
<p>Attachments</p> <p>+ Add attachment ...</p>	<p>*Optional</p> <p>Add an Attachment. The following is a full list of the types of attachments that can be added - .txt, .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.</p>
<p>Start date (expected to be public in 14 day(s))</p> <p>2019-03-20</p> <p>Expiration date (will expire in 22 day(s))</p> <p>2019-03-28</p>	<p>*Optional</p> <p>Set Start and Expiration dates.</p> <ul style="list-style-type: none"> • Start date indicates that the document will be not published to Knowledge Server before this date, even if it has been approved • 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.
<p>Channels</p> <p><input type="checkbox"/> Document applies to channels selected</p> <p>collaborating fax Add Channel</p>	<p>*Optional</p> <p>Add a list of media channels if this document provides data to a conversation via specific media (like chat, for example).</p>

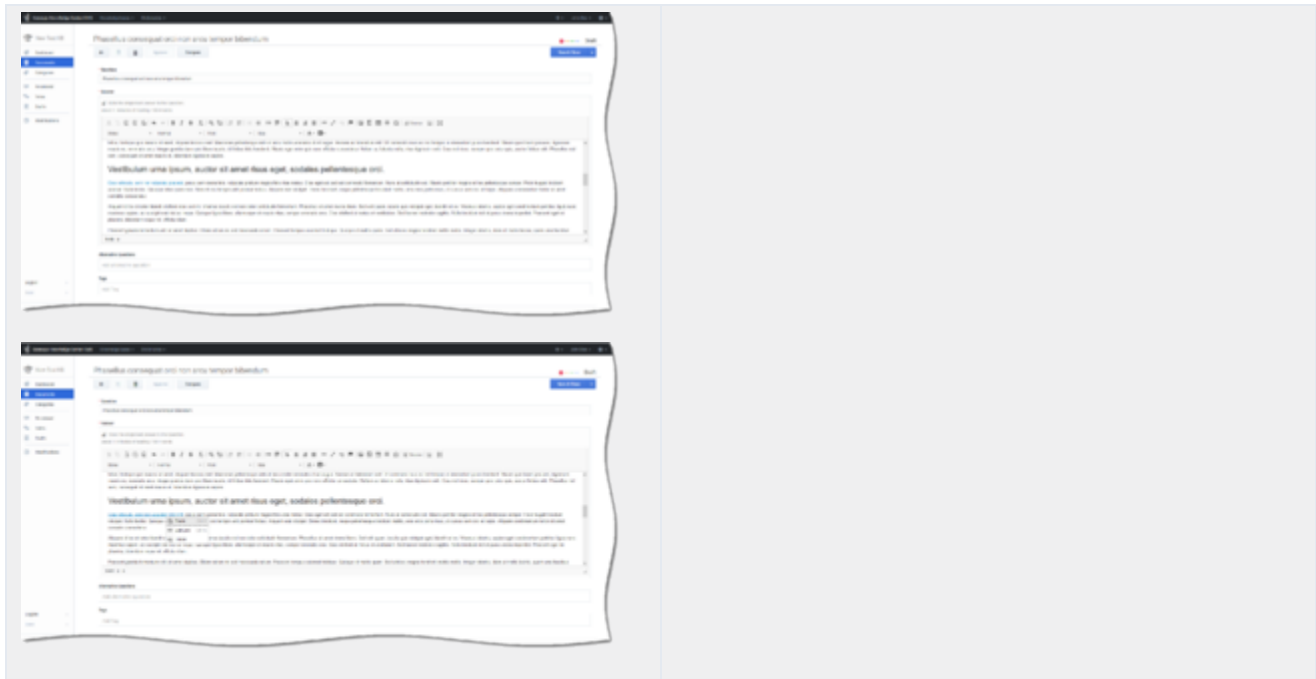
	<p>Click Save & Close or select one of the other options in the Save & Close button's drop-down menu.</p>
	<p>*Optional</p> <p>Add a link to any document in any knowledge base:</p> <ol style="list-style-type: none"> 1. Select text (if nothing is selected, the CMS automatically adds the title of the chosen linked document as text). 2. Click Insert local link. 3. In the next window, select the knowledge base and language (your current knowledge base and language are selected by default), and begin typing a key word in the Search documents field to start a query. 4. Query results are displayed with a list of document titles that match the query. 5. Select a document and click Insert. 6. A link to this document is added to your text. 7. If you view a document that contains links, you can click the link to view the linked document. <p>Important notes:</p> <ul style="list-style-type: none"> • A link can be removed using the Unlink option in the toolbar or using the right-click menu. • A document with a link can only be published after the linked document is published. Documents containing a link to a document that is not published contain a red warning in the search results list and in the document itself. Also, the link to a document that is not published will be red. • If the document being linked to has been deleted, you will see a notification that the link is broken. Both in the list of documents and inside the document itself, the link to a deleted document will be red. Also, a message will appear if you attempt to delete a document that is linked to a different document.

	<ul style="list-style-type: none"> • 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.
	<p>*Optional</p> <p>Add a table of contents (TOC) to any document in any knowledge base:</p> <ol style="list-style-type: none"> 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. 4. 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.
	<p>*Optional</p> <p>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.</p> <ol style="list-style-type: none"> 1. 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-Z, a-z, 0-9).

Additional Characters Allowed in Object Names

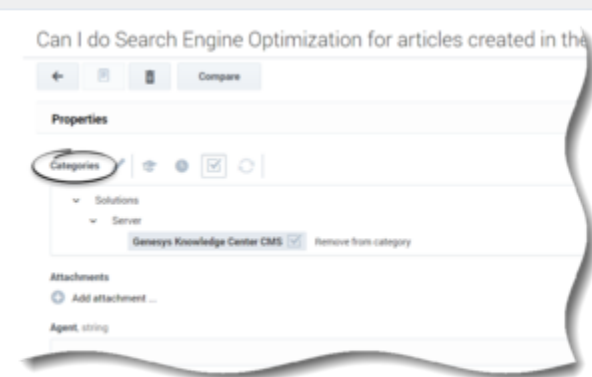
Name	Character	Name	Character	Name	Character
Hyphen	-	Exclamation point	!	Backslash	\
Number sign, pound	#	Dollar sign	\$	Parentheses	()
Caret	^	Asterisk	*	Question mark	?
Underscore	_	Curly brackets	{ }	Space	
Angle brackets	< >	Period, full stop	.	At sign	@

Important

Applicable only for CMS from version 9.0.000.15 to 9.0.005.04.

Document categories


Document editor view



Categories attached to the document (selected categories) are rendered by default in the **Categories** tree.








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:

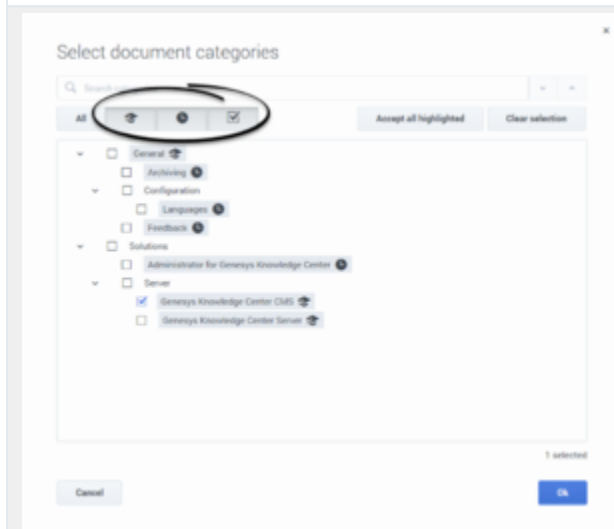
- Click the **Add to category** link near the category name to attach the category to the document.
- Click the **Accept all suggested...** link to attach all recent categories to the document.

	<p>To view Suggested categories:</p> <ul style="list-style-type: none"> Click  in the Categories tree toolbar. Suggested categories are marked with a bold, gray background, their relevant icon, and have an Add to category link near the category name. <p>To attach Suggested category(s) to the document, 2 options are available:</p> <ul style="list-style-type: none"> 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. <p>To refresh the list of Suggested categories:</p> <ul style="list-style-type: none"> Click  (enabled only when suggested categories are displayed).
	<p>To view Selected categories:</p> <ul style="list-style-type: none"> Click  in the Categories tree toolbar. Selected categories are marked with a bold, gray background, their relevant icon, and have a Remove from category link near the category name. <p>To remove document from Selected category(s):</p> <ul style="list-style-type: none"> Click the Remove from category link near the category name to deattach the category from the document.

Category selection

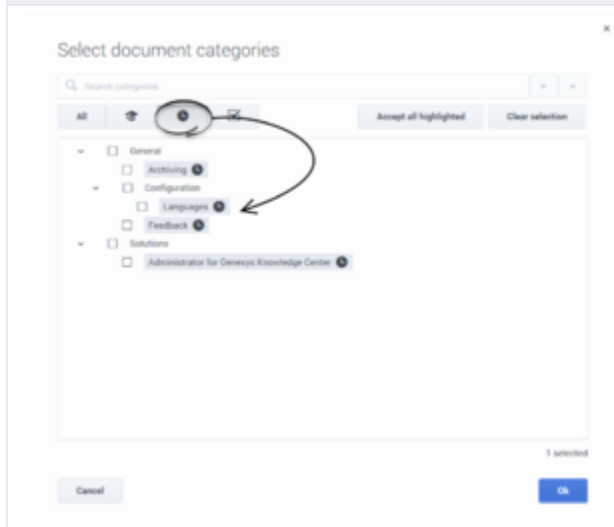


To attach categories to the document or edit categories which are already attached, click  in the **Categories** tree toolbar.




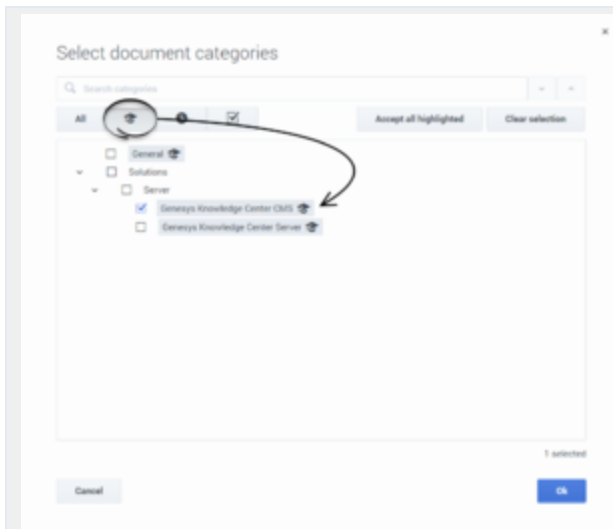
The Categories tree window is opened with **Selected**, **Suggested**, and **Recent** categories' sub-trees expanded to the terminal highlighted category by default.

Note: **Suggested** and **Recent** buttons are disabled when there are no suggested or recent categories available.




To view **Recent** categories:

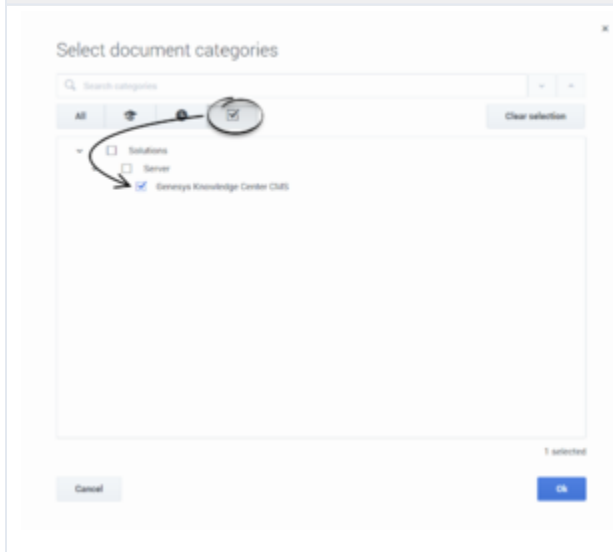
- Click  in the **Categories** tree toolbar.
- Recent categories are marked with a gray background and have the clock icon near the category name



To view **Suggested** categories:




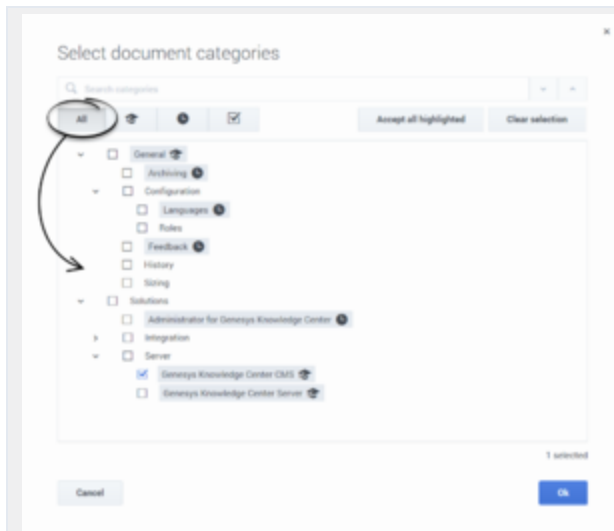
- Click  in the **Categories** tree toolbar.
- Suggested categories are marked with a gray background and have the hat icon near the category name.



To view **Selected** categories:



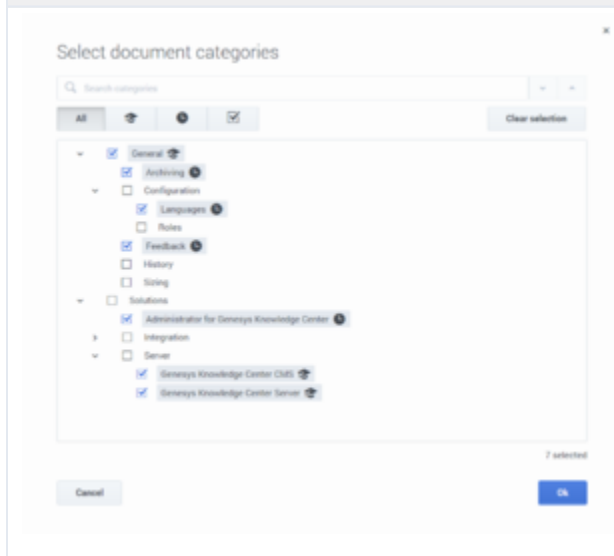
- Click  in the **Categories** tree toolbar.
- Selected categories are marked with a checkbox.



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.



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.

Accept all highlighted

- Click **Accept all highlighted** to check all the checkboxes for all **Suggested** and **Recent** categories for the document.

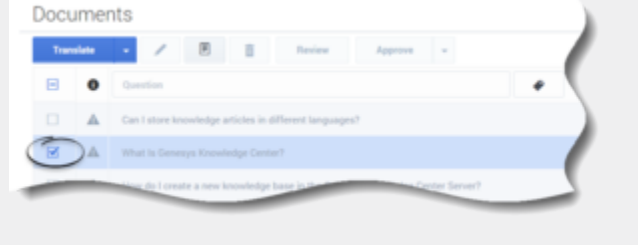

Translating a document

For a quick reference on how to:

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

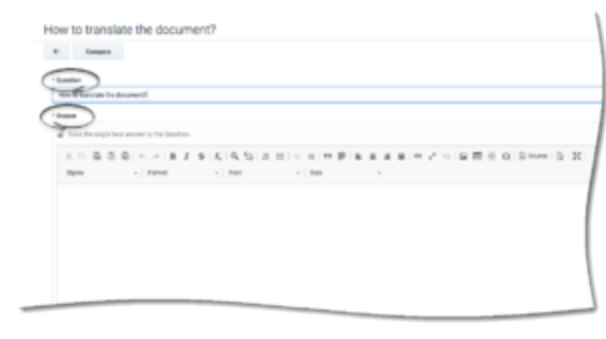
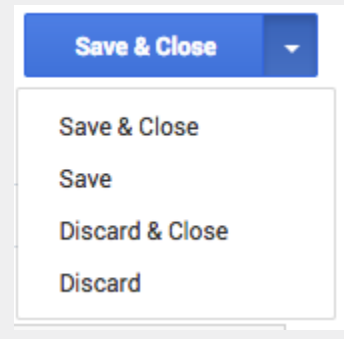
please see the following video—

[Link to video](#)

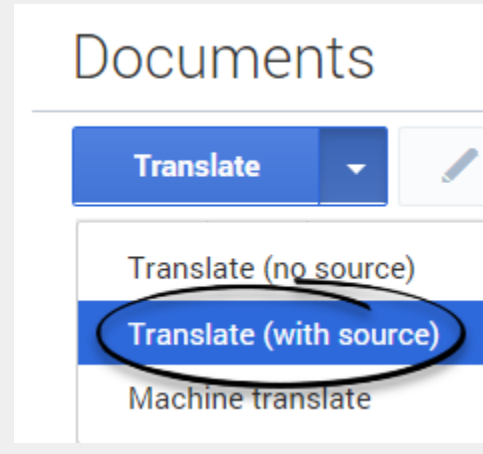

 A screenshot of the 'Documents' toolbar. The 'Translate' button is highlighted with a blue selection bar. Below the toolbar, a list of documents is visible, with the first document 'Can I store knowledge articles in different languages?' selected.	<p>Select a document to translate to the current language.</p>
 A screenshot of the 'Documents' toolbar with the 'Translate' dropdown menu open. The menu options are 'Translate (no source)', 'Translate (with source)', and 'Machine translate'. The 'Translate (no source)' option is circled with a black line. Below the toolbar, the same list of documents is visible.	<p>Click the arrow next to the Translate menu and choose one of the three types of translations from the list:</p> <ul style="list-style-type: none">• Translate (no source) - Creates a blank document in the selected language for manual translation.• Translate (with source) - Creates a copy of the source document, copying all the content into a newly created language version. Content then needs to be manually translated to the selected language.• Machine translate - Uses a machine translation service (needs to be configured by your administrator) to create a document in the selected language by translating the content of the original document.

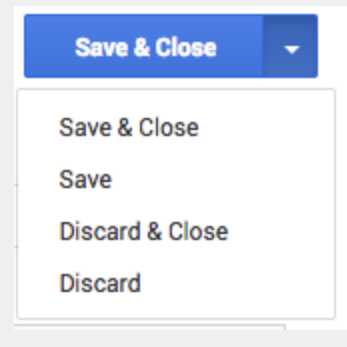
Translate (no source)

 A screenshot of the 'Documents' toolbar with the 'Translate' dropdown menu open. The 'Translate (no source)' option is circled with a black line. The other options are 'Translate (with source)' and 'Machine translate'. Below the toolbar, the same list of documents is visible.	<p>Click the arrow next to the Translate button in the toolbar and choose Translate (no source) from the menu.</p>
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	<p>Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.</p>
	<p>Click Save & Close or select one of the other options in the Save & Close menu.</p>

Translate (with source)

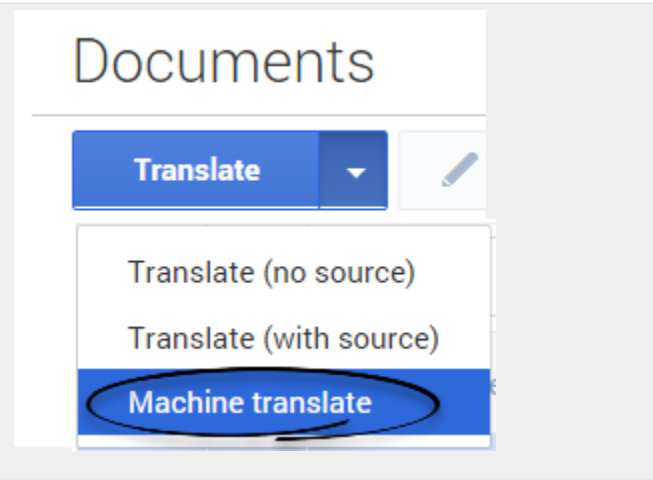

	<p>Click the arrow next to the Translate button in the toolbar and choose Translate (with source) from the menu.</p>
	<p>Translate the document fields using the source document content.</p>

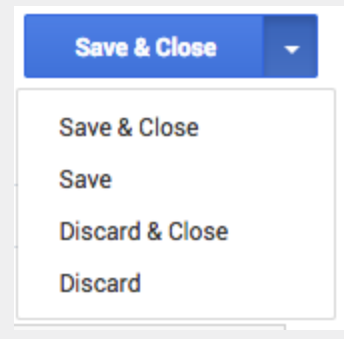
	<p>Click Save & Close or select one of the other options in the Save & Close menu.</p>
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Machine translate

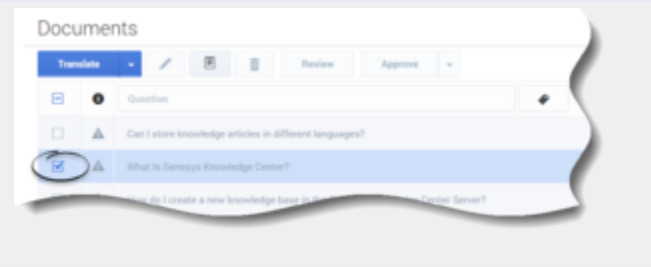
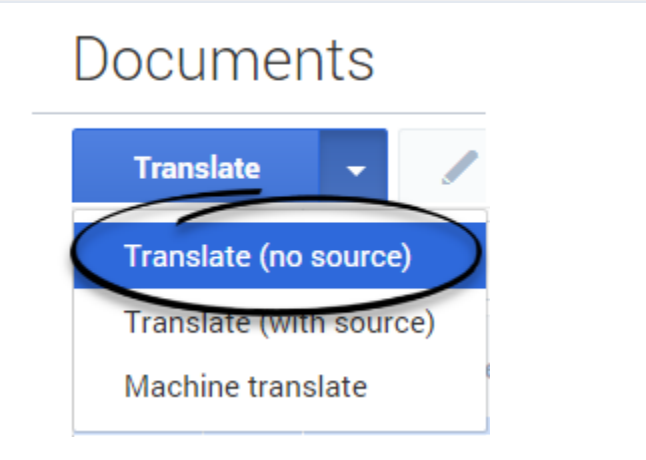
Important

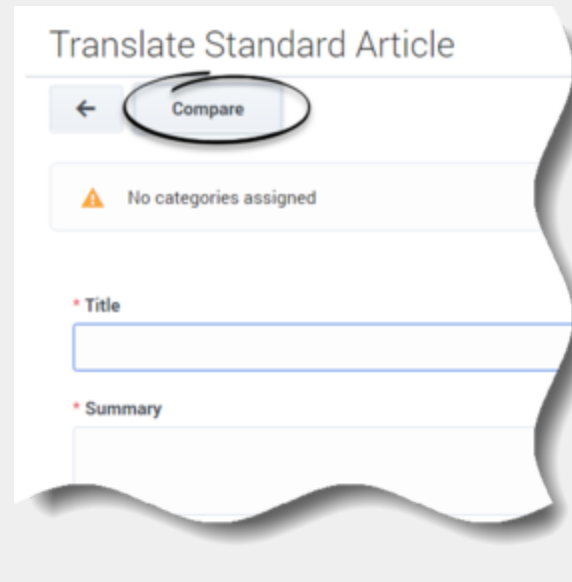


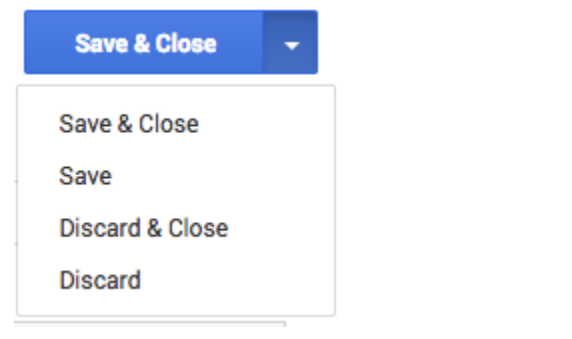
this mode of translation is only available when your administrator has configured an external translation service to translate content.

	<p>Click the arrow next to the Translate button in the toolbar and choose Machine translate from the menu.</p>
	<p>Make edits to the translated version of the document, if necessary.</p>

	<p>Click Save & Close or select one of the other options in the Save & Close menu.</p>
---	--

Translating a document in compare mode

	<p>Select a document to translate to the current language.</p>
	<p>Click the arrow next to the Translate button in the toolbar and choose Translate (no source) from the menu.</p>

	<p>Click the Compare button from the Document translation view.</p>
	<p>Click Machine translate or Translate (with source) from the menu.</p>
	<p>Make edits to the translated fields, if necessary. If you clicked Translate (with source), you must translate the content in the fields manually.</p>
	<p>Click Save & Close or select one of the other options in the Save & Close menu.</p>

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

Translate

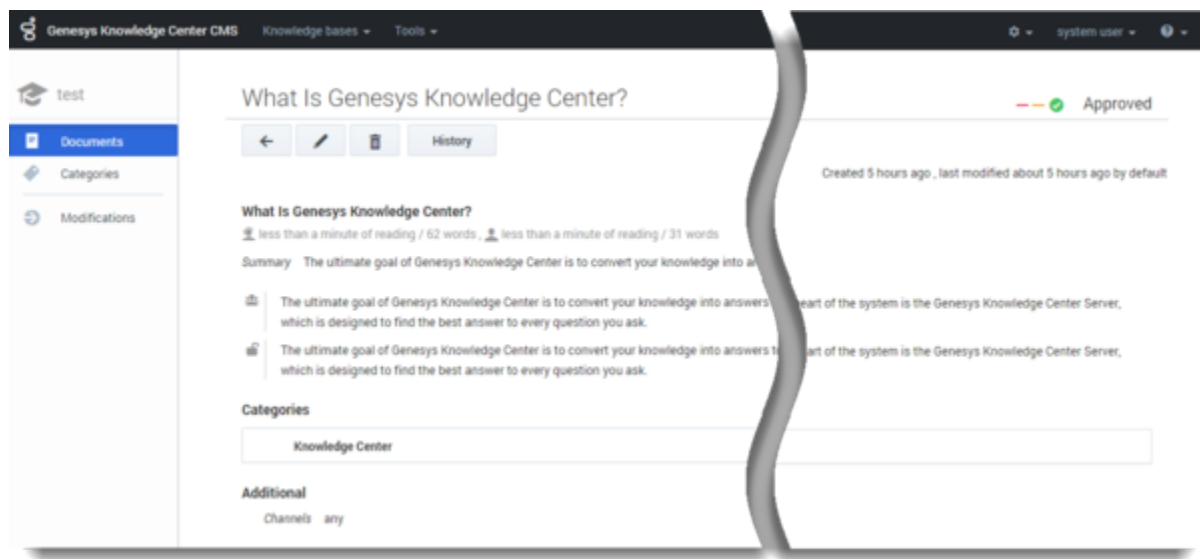
Review

Approve

Publish

<div></div>	<div>i</div>	<div>Question</div>	<div></div>	<div></div>	Type	<div>All Statuses</div>	<div></div>	<div></div>	Modified
<div></div>		What is tags for?			FAQ	<div></div>	<div></div>	<div>i</div>	3 seconds ago
<div></div>		How do I configure two Knowledge Servers into a cluster?			FAQ	<div></div>		<div>i</div>	6 hours ago
<div></div>		Can I use my own CMS system instead of the Genesys Knowledge Center CM...			FAQ	<div></div>		<div>i</div>	6 hours ago

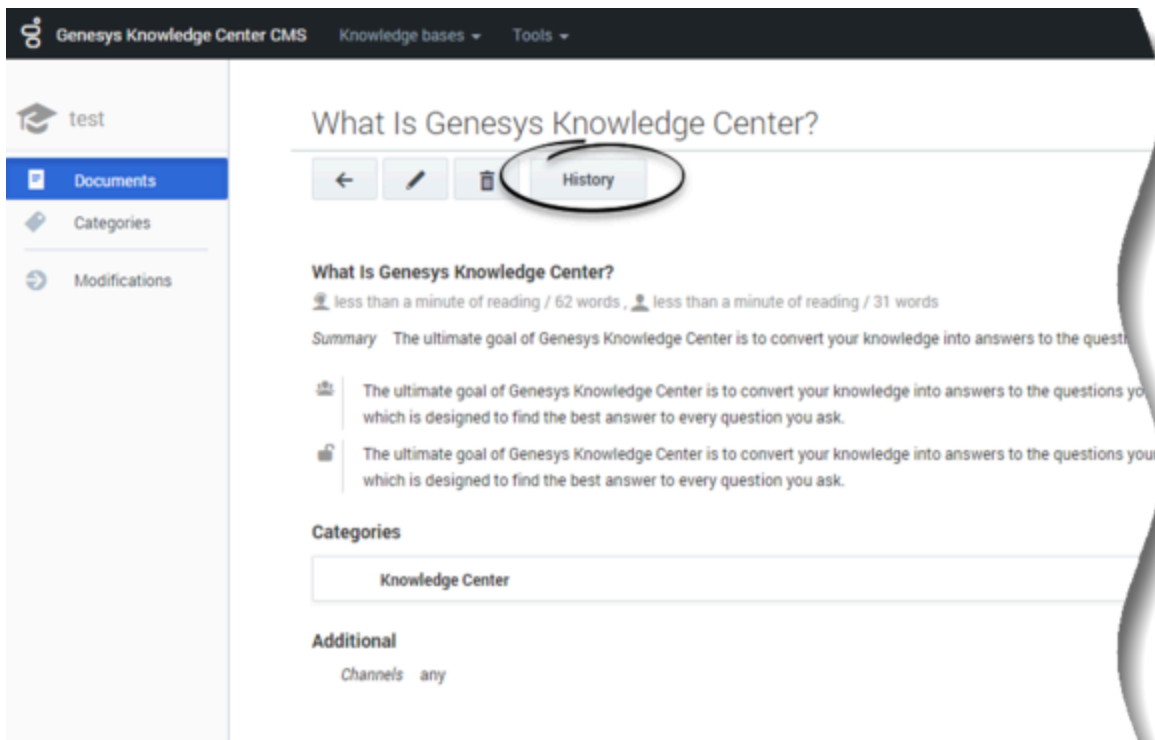
The document will look something like this:



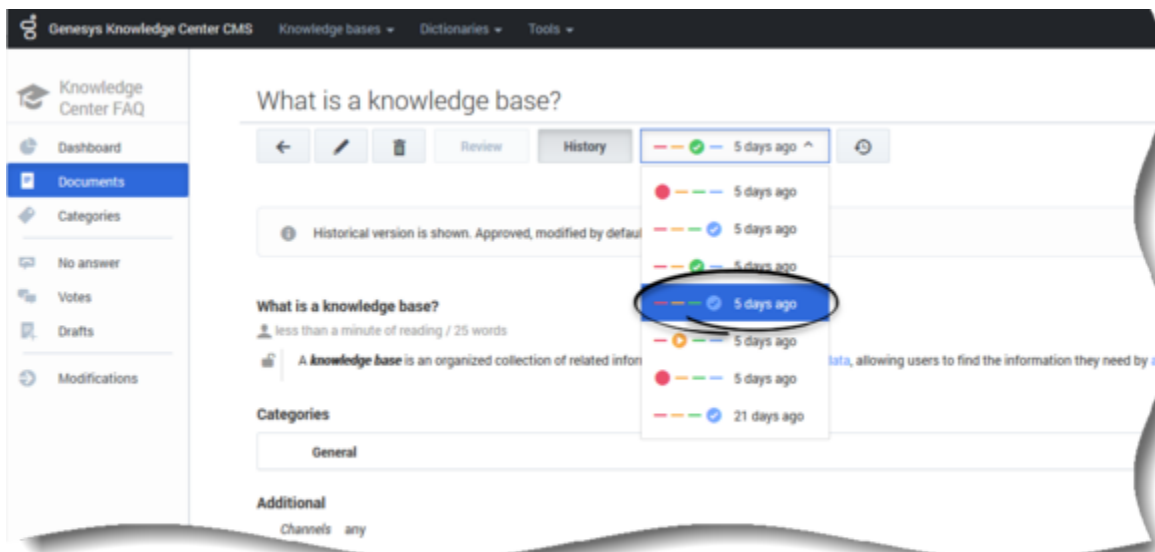
Information about document word count and estimated reading time are found under the question title. The left side (with the agent icon) displays all information (both public + private) and shows the document word count and estimated reading time. The right side (with the customer icon) shows only the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

Document history

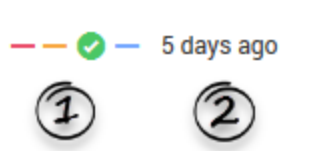
While you are viewing a document content, you can click the **History** button:



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



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



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

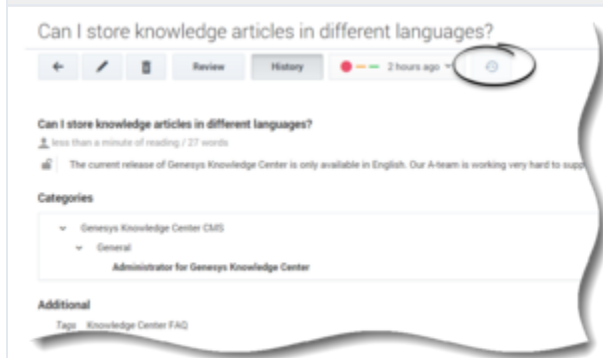
Document version rollback

Important

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



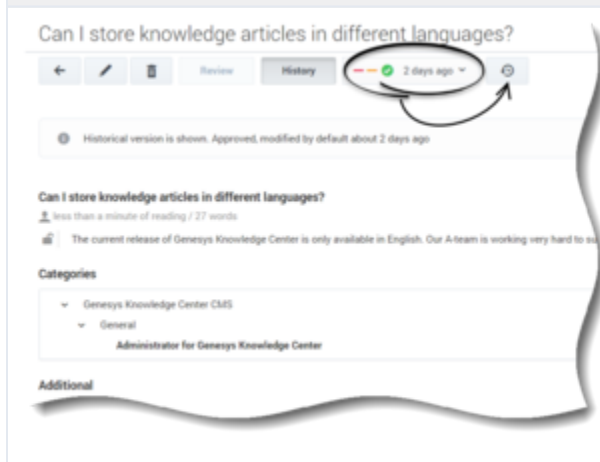
From the document view mode click the **History** button.



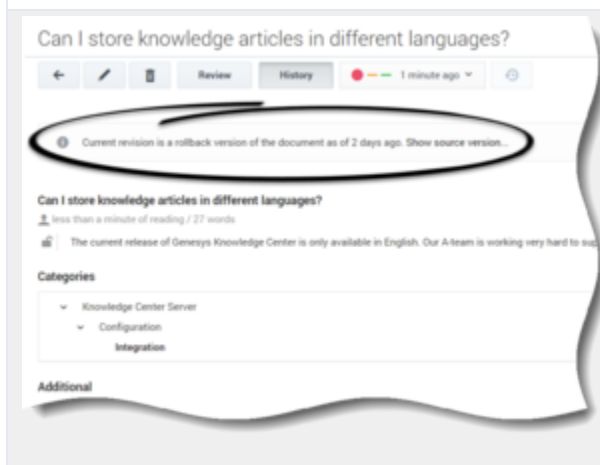
The **Rollback** button is now displayed immediately to the right of the history drop-down menu.



Select a historical version from the history drop-down menu.



The **Rollback** button is enabled after a historical version of the document is selected. Click the **Rollback** button.



The new historical version of the document is created, which is a copy of the source version.

A notification is displayed which states that the current version of the document is a rollback version and provides a link to the source version of the current document's revision.

Comparing document versions

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

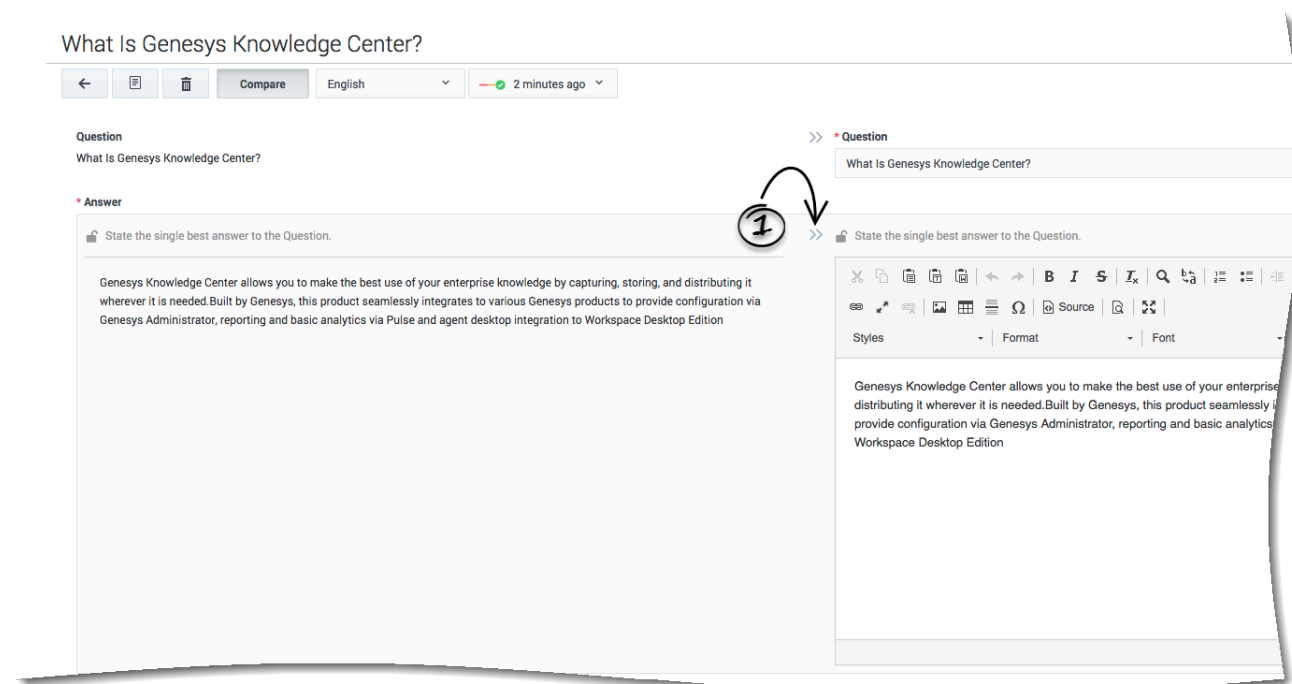


Select the desired language and version from the drop-down lists that appear.

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:



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

Deleting a Document

Prerequisites

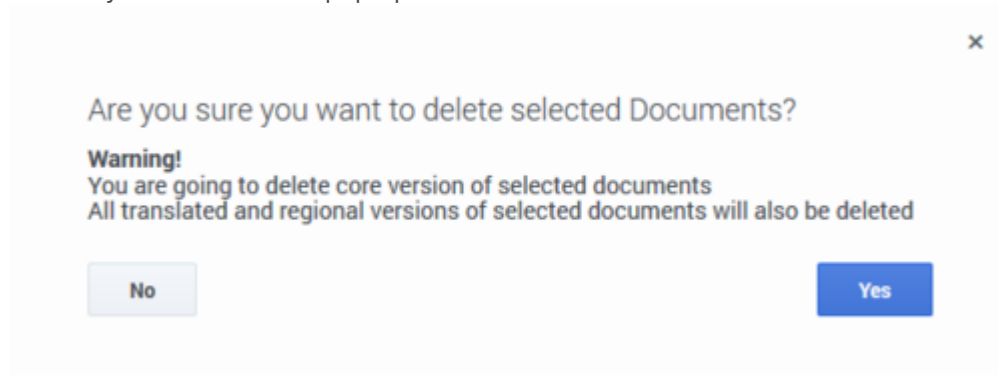
- The knowledge base has been defined in the CMS.
- The Document has already been created.

- 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:



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**.