

GENESYS[®]

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Genesys Knowledge Center User's Guide

Using the CMS (8.5.302.xx and earlier)

4/15/2025

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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:

is been funder brief Knowledge bases			et autorité l'anter O
		E	Ľ
•))	-C	0	
General Documents	Administrator FNQ		

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:

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New card determine my control level of interaction control of						314 10 10 10 10
the firmper cost is const						
toring institution and delate prosecular						ATTA 10 (011) 10.0

- 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. <u>Move your mouse over the + sign on the main page.</u>

Si Denesys Knowledge Center	GKE duster: connected	1 kadmin+
Knowledge bases		0
		(
		(

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.

General	Custom fields	Languages	Channels	Synchronization	Access	
* Knowledge Base ID						
 Knowledge Base Nan 	se .					
Knowledge Base Descr	istion					
,	4					
* Document type			Knowledge Base Ic	con		
			Cenesus			9

- 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.

Create Know	wledge Base					×
General	Custom fields	Languages	Synchronization	Access		
German Italian Spanish Other		* *	English French		Î	
Defaült language English	*					
Cancel					Confirm	



5. Your knowledge base has been created.

Eia Genesys Knowledge Center	GRC cluster: connected	± kadmin+
Knowledge bases		0
Knowledge Center FAQ		

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.

- 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.



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.

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

General	Custom fields	Languages	Channels	Synchronization	Access
Knowledge Base ID					
knowledgefaq					
* Knowledge Base Name					
Knowledge FAQ					
Knowledge Base Descriptio	2n				
Document type			Knowledge Base k	con	
EAO			Genesus		

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.

- 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.

General	Custom fields	Languages	Channels	Synchronization	Access	
Skills	ss to knowledge base					
gka_user			>			-
ça day						
fromGAXskill			-			

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.

Senesys Knowledge Center

Knowledge bases



- 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

- 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

Knowledge bases



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.

GKC cluste	: conn
د	:
e base configuration	
ill be exported to Knowledge Cluster.	
vith ID knowledgefaq already exists in the cluster - its	
Publish	
	1

5. Click the **Publish** button.



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 buttom: rejected, draft, in review, approved):

0
0
•
0

Let's look at an example fllow:

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

O Draft	\rightarrow	~	×	

- 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.

Write a comment						
No		Yes				
Important Comments are visible in t Center Server and are not	he document history : visible for agents an	only. Comr id custome	ents are n s using the	ot exported in e knowledge.	to the Genesys	s 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:

idit category	0 0	a light killer -
Sever Verlag		
empry Real Internal (2014) Enter Ma • Annual (2014) Enter (2014) (2014) (2014) • Annual (2014) (20		Collegeng metrices

- b. You can change content of the category/document and save it and thi 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.





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



Let's summarize this into the state diagram:



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

1	ertermiter Gigens Giost		traject advant -
н -	Company Norma	themas .	maths 1
	Peakask	0	27411-0221328
	Exclosure Education (Construction)	•	274-11-02 21-02-01
	Receivadge Lancer Server	•	278-1142-084047
	bener	•	274-11-00 IN 27-17

- · 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.

•		
•	Category Name	
	Configuration	
	General	
	Genesys Knowledge Center Server	
	Administrator eXtension for Genesys Knowledge Center	
	Feedback	
	Genesys Knowledge Center CMS	
	Sizina	

3. Press the **Create** button.

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

Create Category				× English + defa	ult 👻
General					
Category Name *					
Close	O Pat	->	 ×	Save	Save & Close

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.

- 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.

Luit outego	n y		h.d	-	• Lightin • Genauit	
General	Versions					
Category Name *						
General						

- 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**.

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.

- 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.

Delet			English	+ default
•	Category Name	Status	Modified	•
	Configuration	0	2016-10-20	12:47:18
	General	•	2016-10-11	16:05:21
8	Genesys Knowledge Center Server	0	2016-10-11	16:05:21
8	Administrator eXtension for Genesys Knowledge Center	0	2016-10-11	16:05:21
	Feedback	•	2016-10-11	16:05:21
	Senesys Knowledge Center CMS	•	2016-10-11	16:05:20
	Sizing	•	2016-10-11	16:05:20
	History	•	2016-10-11	16:05:19
	Genesys Knowledge Center Pulse Plugin	0	2016-10-11	16:05:19
	Languages	0	2016-10-11	16:05:19

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

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.

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

Creat	e Calegories 🖌	All Statuses 👻	English +	default +			× Ones
- 1	Question	Attachments	Status	Channels	Valid from	Valid to 0	Modified 0
	Can I use Genesys Knowledge Center as a virtual assistant?		•	any			2016-11-02 13:48:46
	Can I configure my knowledge article approval workflow and ilfecycle?		•				2016-10-13 13:27:20
	How can Lassign Genesys Knowledge Center Plugins to my agents?		•				2016-10-13 13:27:2
	How can I set access control for my administrators and managers?		•				2016-10-13 12:27:1
	How can I archive-older knowledge base articles?		•				2016-10-13 13:27:10
	Does Genesys Knowledge Center know how much time a person spends reading each article	(•				2016-10-13 13:27:1
	How can I add search capability to a custom agent desktop?		•				2016-10-13 13:27:10
	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center O		•				2016-10-13 12:27:16
	Can I prevent customers from seeing certain knowledge base articles?		•				2016-10-13 13:27:11
	Is agent feedback treated differently from customer feedback?		0				2016-10-13 13:27:11

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

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FAQ	Categories	Custom attributes	Attachments	Other				
Question								
itemative Quest	ions							
+ Add altern	native question							
Answer								
XGG	B B + - Fornal		1 III Ξ Ω Β	I 6 I _s = = = -	-11 99 🗟 Deveta	×		
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booly								
landy								
booly								

- 4. 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.
- 5. Fill in the **Categories** tab by selecting the appropriate categories from the list on the left and moving them to the right.

It AD Categories Control antibility Otherworth Administration Streamsine For Generyte Scoweinstge Centre Atministration Streamsine For Generyte Scoweinstge Centre Image: Centre Centre Administration Streamsine For Generyte Scoweinstge Centre Image: Centre Image: Centre Generyte Scoweinstge Centre FAlse Image: Centre Image: Centre Generyte Scoweinstge Centre Image: Centre Image: Centre Generyte Scoweinstge Centre Image: Centre Image: Centre Generyte Scoweinstge Centre Image: Centre Image: Centre
Administratur eXtension for Generarys Kloweledge Center Arching (out agarened Configuration Feedback Generary Kloweledge Center CAS Generary Kloweledge Center CAS Generary Kloweledge Center Purgin Generary Kloweledge Center Nuckgace Purgin Generary Kloweledge Center Nuckgace Purgin Generary Kloweledge Center Nuckgace Purgin Generary Noveledge Center Nuckgace Purgin Generary Noveledge Center Nuckgace Purgin Generary Noveledge Center Nuckgace Purgin Generary Noveledge Center Nuckgace Rugin Generary Nater Nater Nater Sterny

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

cate aver	ument						9	 English + defaul 	
FAQ	Categories	Custom attributes	Attachments	Other					
witch, boolean					Date, date				
Choose among th	he following								*
last, list of values					Numeria, numeri				
Choose among th	he following								*
tring string									

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

	Categories	Custom attributes	Attachments	Other				
Close					O Dat	-> - ×	See See	A 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.

			Valid to			
aga						
Add Tag						
E Define document's (channels list					
aiet						
appoharing						
aumork						
busevent						
calback						
cobrowsing						
email						
fax						
inchat						

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.

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

Creat	te Categories 🖌	All Statuses 👻	English +	default +			×	
- 1	Question I	Attachments	Status	Channels (Valid from	Valid to = 1	Modified	٠
	Can I use Genesys Knowledge Center as a virtual assistant?	0	•	any			2016-11-0	2 12:48:46
	Can I configure my knowledge article approval workflow and illecycle?		•				2016-10-1	3 13:27:20
	How can Lassign Genesys Knowledge Center Plugins to my agents?		•				2016-10-1	3 13:27:26
	How can I set access control for my administrators and managers?		•				2016-10-1	3 13:27:14
	How can I archive older knowledge base articles?		•				2016-10-1	3 13:27:16
	Does Genesys Knowledge Center know how much time a person spends reading each article		•				2016-10-1	3 13:27:17
	How can I add search capability to a custom agent desktop?		•				2016-10-1	3 12:27:16
	Can I do Search Engine Optimization for articles created in the Generys Knowledge Center CF		•				2016-10-1	3 13:27:14
	Can i prevent customers from seeing certain knowledge base articles?		•				2016-10-1	3 13:27:15
	is agent feedback treated differently from customer feedback?		•				2016-10-1	3 13:27:16

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

* Ouestion How can't out access control for my administrations and managers? Menative Questions * Answer * Answe	t access central for ing administrators and nanagers ¹ exercises terrative question Terrative question Terrative question Terrative question = x* = 1 = 2 = 0 = 1 = 5 = 1, p = 1 = 0 = 0 = 0 = 0 = 0 = 0 = 0 = 0 = 0	* Outside How can't out access control for my administrations and managers* Managers Marketive Questions * Answer Sub OKC Server and the OKC CASS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the OKC Deployment Guide for more information of these philoges and how to ase them.	FAQ	Categories	Custom attributes	Attachments	Other	Versions			
How can I of access control for my administrations and managers?	t access control for my administrators and nanogent's exercises terrative question	How can I of access control for my administrations and managers?	Question								
Ansaer Soft GKC Server and the GKC CM3 have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GKC Deployment Guide for more inform these privileges and how to use them.	eetiens ternative question	Ansare Image: Service and the GRC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GRC Deployment Guide for more information of these privileges and how to use them.	How can I set acce	ss control for my administrat	tors and managers?						
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Both OKC Server and the GKC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Parler to the GKC Deployment Guide for more inform these privileges and how to use them.	Server and the GKC CM3 have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the GKC Deployment Guide for more information on legen and how to use Rem.	Both OKC Server and the OKC CMS have their own sets of administrative privileges to allow agent to become administrators of these products. Refer to the OKC Deployment Guide for more information of these privileges and how to use them.	XOBB	G to Pornal	· · · · · · · ·	$\equiv \equiv \Omega = 0$	I 6 I, 2 1	······································	uce 24		
these privileges and how to use them.	leges and how to use them.	these privileges and how to use them.									
	e		Both GKC Serve	er and the GKC CMS have	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GKC Depicument	nt Guide for more information	e on
	e		Both GKC Serve these privileges	er and the GRC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GRC Deployme	nt Guide for more information	n on
	e		Both GKC Serve these privileges	er and the GRC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GKC Deployme	nt Guide for more information	n on
			Both GKC Serve these privileges	er and the GKC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administr	ators of these products.	Refer to the GKC Deployme	nt Guide for more information	n on
	· · · · · · · · · · · · · · · · · · ·		Both GKC Serve these privileges	er and the GKC Cluts have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GRC Deployme	nt Guide for more information	n on
			Both GKC Serve these privileges	er and the GKC ChilS have and how to use them.	their own sats of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GKC Deployme	nt Quide for more information	
			Both GKC Serve these privileges	er and the GKC CMS have and how to use them.	their own sets of administra	tive privileges to allow a	agent to become administra	ators of these products.	Refer to the GRC Deployme	nt Guide for more informatio	n on
		Plan benefit at the second sec	Buth GKC Serve these privileges	er and the GKC CMS have	their own sets of administra	tive privileges to allow a	agant to become administr	ators of these products.	Refer to the GKC Deployme	et Guide for more informatio	• ••

- 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**.

	Categories	Custom attributes	Attachments	Other	Versions		
Oversion How can I set acc Answer Both GKC Serve more informatic New version	ess-control for my administra er and the GKC CLIS have their on on these privileges and how	tors and managers? own sets of administrative pri v to use them.	vileges to allow agent to	become administrators of th	ese products. Refer to the	0x0 Deployment Quide for	Document versions o default, 2 seconds age default, 15 minutes ago o default, 15 minutes ago o default, 15 minutes ago o default, 25 days ago
Categories • Genesys Know • Roles Custom attribute	redge Center Sierver						
Channels							
any							
Status							
O Datt, Saved	ty default at 2016-11-02 14:24	116					

Copying content from one document version to another

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

	۵	✓ English + default	Ŷ

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 dublicated 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.



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

100					radiati	
			-			
Income other lands	1 days in states					
1.000						
1.000	_					
1 store		105				
2 store		-				
1.00		105				

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.

FAQ	Categories	Custom attributes	Allachments	Other	Versions		 English + default 	
							 English (United States) 	
Question							# French + base	
How can I add searc	ch capability to a custom age	nt desktop?					 French-(Canada) 	
Alternative Question	15						# French (France)	
Add alternal	the question							
Answer								
Asser	G to a literat							
X 0 B B	G + Format	· • · • 2	a ≡ ≡ Ω B	I 6 I	(4.4.99)[B1	iourae 🔀		
X & B B	G . o Final	- [= ,*]] S		I 6 [I] = :	:	lourse 🔀		
Answer X C B B	n 🛱 रू. → 🗍 Format ar Server exposes all of its !	• = • • • E	a Ξ Ξ Ω) B ST AP1. You can use th	$I = 6 T_n $ [$I = 1$ vis AP1 to add search to	t - + + + + +) [= 1 publities to your custom	desktop.		
Knowledge Cente	B ★ → Format In Server exposes all of its !	•] = • • =] [a III III III III IIII IIII IIIIIIIIII	$I = 6 T_n \rangle [I = 1$ is AP1 to add search c	a l de de l 99 🗎	desiltep.		
Knowledge Cente	■ ← →][Fornat ar Server exposes all of its !		B I III Ω B	$I = \mathbf{S} \mid \mathbf{I}_{e}$ $\left[\ddagger \ddagger \ddagger$	t (t ++) [desktop.		
Answer X C G G C	ar Server exposes all of its t	• • • • • • • •	ST API. You can use th	I S I , I II I	t -00t 99) 🗎 0 publities to your custom	desktop.		
Answer X C G G G Knowledge Cents	■ + → Format ar Server exposes all of its t	•	a Ξ Ξ Ω] B ST APL You can use th	I 6 I, I II I	t -00t 99) 🗎 0 publities to your custom	desktop.		
Answer X C G G G Knowledge Cents	Ge ▲	। 😑 🔹 न् । 🖾 Lectionality through a RES	a Ξ Ξ Ω B ST.APL You can use th	I 6 T _e I I I I	abilities to your custom	desktop.		
Answer X C G G G	B ← →] Forus at Server exposes all of its !	• 😑 🔹 ল 🖆	a Ξ Ξ Ω) [B ST.APL You can use th	I 6 I 7 I I I I	t ≪ −4t ++) <u>B</u> t publities to your custor	desktop.		
Ansawr X O G G	(Q) ★ →][Forug Forug exposes all of its t	•)(= • • •)(E	a 📰 Ξ Ω 🛛 Β	I 6 I , I II I	t dt 4 39] (≧ 1 publities to your custors	desitup.		
Ansawr	i 🖳 I ♠. →][Format ar Server exposes all of its f	•) (= ়* াল) [ত্রি	a ≡ ⊕ Ω) B STAPL You can use th	I 6 X	E di - dit ₱₱) [∰ ti publities to your custom	desitip.		
Answer X C C C C	(a) ★ →][Forus: ar Server exposes all of its t	•) (= •* • •) (=	a ≡ ≡ Ω 8 ST APL You can use θ	I 6 Z][I I	E de -de 99][B (desktop.		

- 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.



E	n	d
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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.

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

	Campons / Anna	*	College (Counter	stated +			Canada da c
- N	Question (Attachments	Status	Channels	Valid from	Valid to 1	Modified #
я	How can I add search capability to a custom agent desktop?		0				2016-11-02 16:00:21
я	Does Genesys Knowledge Center know how much time a person spends reading each article		0				2016-11-02 16:00:21
8	How can I set access control for my administrators and managers?		0	any			2016-11-02 16:00:21
я	Can I prevent oustomers from seeing certain knowledge base articles?		0				2016-11-02 16:00:21
я	Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center Cl		0				2016-11-02 16:00:21
8	is agent feedback treated differently from customer feedback?		0				2016-11-02 16:00:21
я	Can I configure my knowledge article approval workflow and lifecycle?		0				2016-11-02 13:49:01
я	How can I archive older knowledge base articles?		0				2016-11-02 12:49:01
я	How can I assign Genesys Knowledge Center Plugins to my agents?		0				2016-11-02 13:49:01
я	Can I use Denesys Knowledge Center as a virtual assistant?		0	any			2016-11-02 13:49:01

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)

Constant Constant	Curtan attracted	Cardindau	Channes .		Synchronia	100	40.000	
Automatic synchronization	- 07							
Attachments specification	disc type		Drieduling					
Expert attachments with	Provine 4		Hearty					
Do not expert attaches Report only attachesed Report attachesed	erita In CARLA IN Contant		Repeat every	1	hear(s) all	•	autors)	

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

	Scheduling		
*	Hourty		*
	Repeat every 1	hour(s) at	minute(es)
1			
	•	Scheduling Hourly Repeat every 1	Scheduling Hourly Repeat every 1 hour(s) at 0

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 I	Type i	Approved	Modified
How can I add search capability to a custom agent desktop?	English	APPROVED		2016-11-02 16:0
Does Genesys Knowledge Center know how much time a person spends reading each article?	English	APPROVED		2016-11-02 16:0
How can I set access control for my administrators and managers?	English	APPROVED		2016-11-02 16:0
Can I prevent customers from seeing certain knowledge base articles?	English	APPROVED		2016-11-02 16:0
Is agent feedback treated differently from customer feedback?	English	APPROVED		2016-11-02 16:0
Can I do Search Engine Optimization for articles created in the Genesys Knowledge Center CMS?	English	APPROVED		2016-11-02 16:0
Can I use Genesys Knowledge Center as a virtual assistant?	English	APPROVED		2016-11-02 13:4
Can I configure my knowledge article approval workflow and lifecycle?	English	APPROVED		2016-11-02 13:4
How can I archive older knowledge base articles?	English	APPROVED		2016-11-02 13:4
How can I assign Genesys Knowledge Center Plugins to my agents?	English	APPROVED		2016-11-02 12:4

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

	ge 2000 0 ,	
inguages for sy	nchronization	
English (United	1 States), French (Canada)	/
Cancel		Synchronize

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

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.

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

			English (United States) + From Trom date	to To date	Filter
-	Originator	Agent ID	Query	Language	Created
	2	gks_none	How should I ask questions?	English (Un	2016-11-02 16:56:38
	2	gks_none	Can I configure my knowledge article approval workflow and lifecycle?	English (Un	2016-11-02 16:52:47
	2	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center cluster?	English (Un	2016-11-02 16:52:28
	2	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center cluster?	English (Un	2016-11-02 16:52:20
	2	gks_none	What is the difference between the Knowledge Cluster and the Knowledge Server?	English (Un	2016-11-02 16:52:02
	2	gks_none	Why do I need the Genesys Knowledge Center CMS?	English (Un	2016-11-02 16:51:53
	2	gis,rore	How can I assign Denesys Knowledge Center Plugins to my agents?	English (Un	2016-11-02 16:51:34
	1		90 th	English (Un	2016-11-02-01:21:47
	1		•	English (Un	2016-11-01 20:06:46
	1		Drigstigsig	English (Un	2016-11-01 20:06:41

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

ja Genes	ys Knowledge	e Center Doc	uments Categories Feedback Modifications	
Home /	knowledgefaq	/ Feedback		
No ans	wer	Votes	Drafts	
Creat	e document	Dele Q	Search English (U	Inite
•	Originator	Agent ID	Query	
Ø	<u>¶</u>	gks_none	How should I ask questions?	
	<u>@</u>	gks_none	Can I configure my knowledge article approval workflow and lifecycle?	
	<u>a</u>	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center	r cluster?
	<u>a</u>	gks_none	Why do I need to configure two communication ports for the Genesys Knowledge Center	r clust
	<u>a</u>	gks_none	What is the difference between the Knowledge Cluster and the Knowledge Server?	
		te pope	Why do I need the Genace	

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

reate do	cument							# English + default	~
FAQ	Categories	Custom attributes	Atlachments	Other					
vestion									
tow should I as	A questions ?								
ernative Quesi	tions								
Antana	native question								
newer									
X G B	0 0 t + ∞ fromat	-lezala	≡ = o ∎ .	6 K	a a 199 Ba	ourse 30			
	<u>.</u>								
Close					O Draft	- ×	ж	Sere Ser	e & Chose

• 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.

			All +	English (United States) + From From dute	10 To date	Filter
Originator	Document Question	Туре	Rating	Query	Language	Created
1	What components are included in Genesys Knowledge C		*****		English (Un	2016-11-02 17:10:24
1	Why do I need the Genesys Knowledge Center ChitS?	9 1		Why do I need the Genesys Knowledge Center CMS	English (Un	2016-11-02 17:10:04
1	Why do I need the Genesys Knowledge Center CMS7	*	****	Why do I need the Genesys Knowledge Center CMS	English (Un	2016-11-02 17:09:47
1	How should I ask questions?	*	*****	What are alternative questions	English (Un	2016-11-02 17:09:30
1	Can I restrict access to the knowledge base to my agent	9 4	黄黄黄☆☆	Can agents add new documents to the knowledge base	English (Un	2016-11-02 17:09:18
1	How should I ask questions?		*****	How should Lask questions	English (Un	2016-11-02 17:09:04
1	How many clusters are required in my environment?		*****		English (Un	2016-11-02 17:08:41
1	How do I configure two Knowledge Servers into a cluster	*		How do I configure two Knowledge Servers into a cluster	English (Un	2016-11-01 19:58:44
1	How do I configure two Knowledge Servers into a cluster	9 4		cluster	English (Un	2016-11-01 19:54:47
1	How do I configure two Knowledge Servers into a cluster			cluster	English (Un	2016-11-01 19:49:19

- 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** <u>alternative</u> button. Or **Edit** existing document. Or **Create** new document basing on search query.

FAQ	Categories	Custom attributes	Allachments	Other			
Overtion							
How should I ask	pestions*						
ternative Questio	ins.						
Add altern	the question						
Loswer							
		le telfa					
A 13 48 4	I W W IV TOTAL			9 A 1 1 11	· · · · · · · · · · · · · · · · · · ·		
							-
							e
One					0.048	4 4	A Close

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

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.

No ans	wer Votes Drafts		
.	Question	English (U Answer	hited States) - From Fro
	How should I ask questions? NEW QUESTION	NEW ANSWER FOR QUESTION	English (Un

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

End