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Genesys Knowledge Center User's Guide

Managing Knowledge Bases

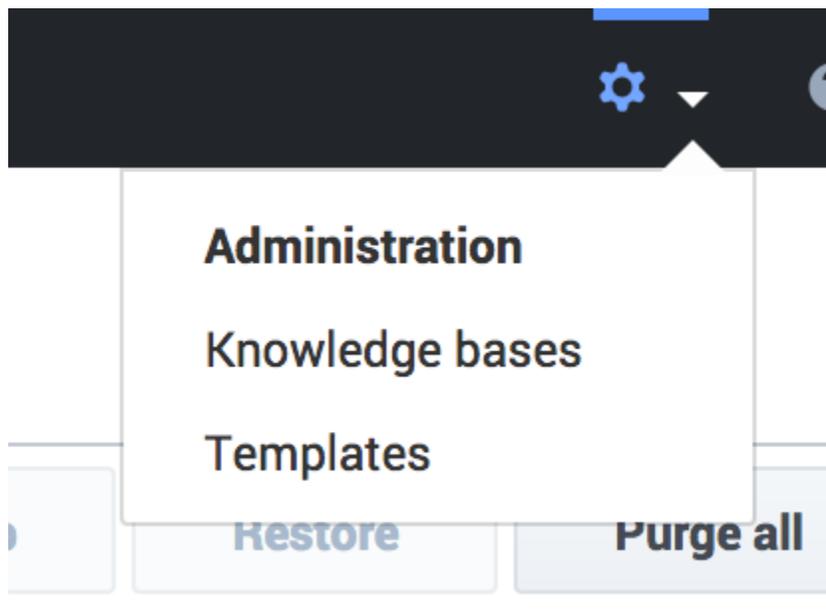
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Managing Knowledge Bases

Overview

The administration area allows you to set up knowledge bases according to your company needs. To open the administrator area click the gear icon in the main menu and then select **Knowledge Bases** from the drop down menu.



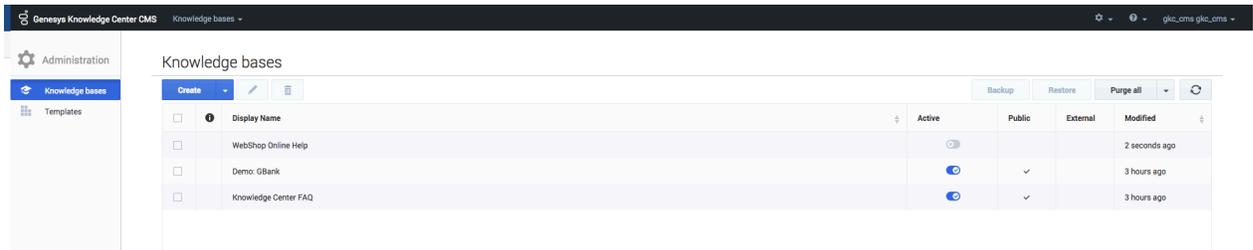
Important

To access the functionality you need to be assigned CMS Administrator privilege - Knowledge.CMS.Administrator (for more details, please see [Access Permissions](#)).

Creating a new knowledge base

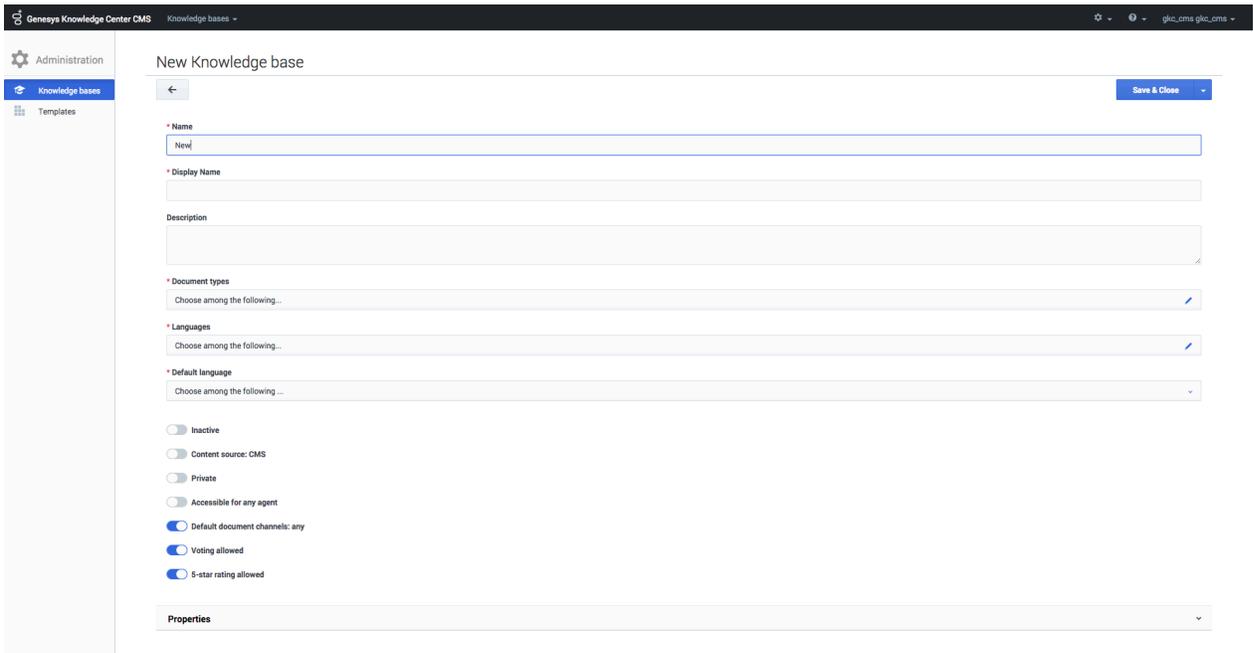
To create a knowledge base in the administration area:

1. press the **Create** button:



2. A new knowledge base form is opened. Fill in the mandatory fields:

- enter **Name**
- enter **Display Name**
- select at least one document type in **Document types**
- select at least one language in **Languages**
- select the **Default language**



3. Click **Save & Close**.

Important

There are several properties that cannot be changed after you have created a knowledge base. Please pay special attention when you select your values for them:

- Name - defines unique name of the knowledge base
- Document types - type of the documents that can be created in the knowledge base

- Default language - language that documents need to be created first in
- Content source - defines whether the content of the CMS will be created in Genesys Knowledge Center CMS (value: CMS) or in third-party CMS system (value: Third-party)

Using external content

Knowledge Center allows you to source content from an external system and still be exposed in the same way to the company's agents and customers.

 Content source: CMS	Content source: CMS (default) - Content will be authored in Knowledge Center CMS
 Content source: Third-party	Content source: Third-party - Content will be sourced from external CMS system

Important

Content source can only be defined when the knowledge base is being created. You cannot change the source for the existing knowledge base.

Defining access permissions

The following properties allow you to define the proper access to your knowledge base:

Active/Inactive

 Inactive	Inactive (default) - If you select the inactive status for your Knowledge Base neither your customers nor your agents will be able to search for information in that knowledge base. Knowledge authors and knowledge administrators can still use the base to prepare content stored in it. Inactive status is recommended when your knowledge base is not ready for prime time
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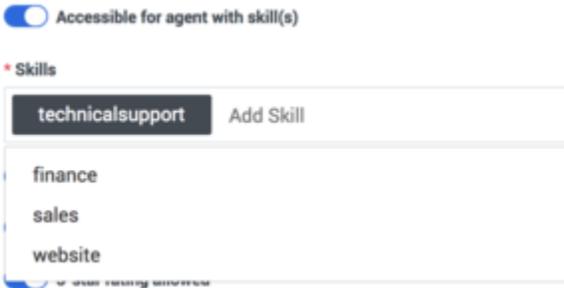
 Active	<p>Active - allows knowledge base to be available for search by agent and customer (according to set permissions)</p>
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Private/Public

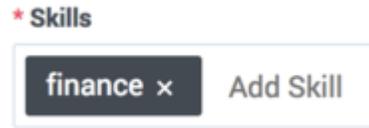
 Private	<p>Private (default) - Knowledge base will be visible for agents only Later for private knowledge bases, you can specify whether the knowledge base should be available to all of your agents or only to the agents that have one of the specified skills.</p>
 Public	<p>Public - Knowledge base visible for any user</p>

Skill-based access

You can make your private knowledge bases available to only a subset of your agents by selecting Skill-based access to the knowledge base. If you choose to make the knowledge base accessible to an agent with specific skills, you will need to select the skills that grant an agent access to the knowledge base:

 Accessible for any agent	<p>Accessible for any agent (default) - knowledge base will be accessible to any agent without any restrictions</p>
 <p>The screenshot shows the configuration interface for skill-based access. It features a toggle switch labeled "Accessible for agent with skill(s)" which is turned on. Below the toggle, there is a section titled "* Skills" containing a search bar with "technicalsupport" entered and an "Add Skill" button. A list of skills is displayed below the search bar, including "finance", "sales", and "website".</p>	<p>Accessible for agent with skill(s) - allows you to specify list of skill-defining restrictions accessing the knowledge base.</p> <p>When this option is activated additional properties are shown. Skills - allows you to define the list of skills for restriction. In a case where you have specified several skills for the knowledge base, the agent needs to have at least one of them to access the knowledge base. Skill level does not influence the ability to access the knowledge base.</p> <p>To add a skill:</p> <ol style="list-style-type: none"> 1. Select a skill from the list or start typing the skill name to limit the number of skills shown. 2. Press Enter or click the list element to add it to selection. <p>To remove a skill:</p> <ol style="list-style-type: none"> 1. Move your mouse over the selected skill.

2. Click the X icon after the skill name.



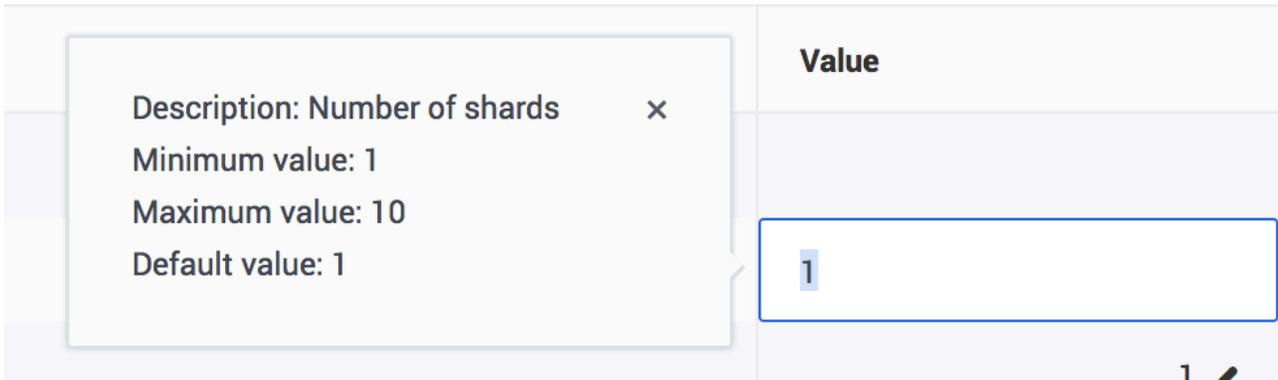
Behavior options

To edit the behavior options you need to expand **Properties** at the bottom of the knowledge base form:

Behavior

Name	Value
▼ index	
Number of shards	1 ✎
Number of replicas	1 ✎
▼ faq	
Out of domain	0.5 ✎
Number of answers	3 ✎
Number of answers in preconfidence selection	10 ✎
Trending period in days	30 ✎
Marked as created during period	1 ✎
Marked as recently modified during period	1 ✎

An option can be edited by clicking on the value. While editing, a hint is shown describing the option and valid values:

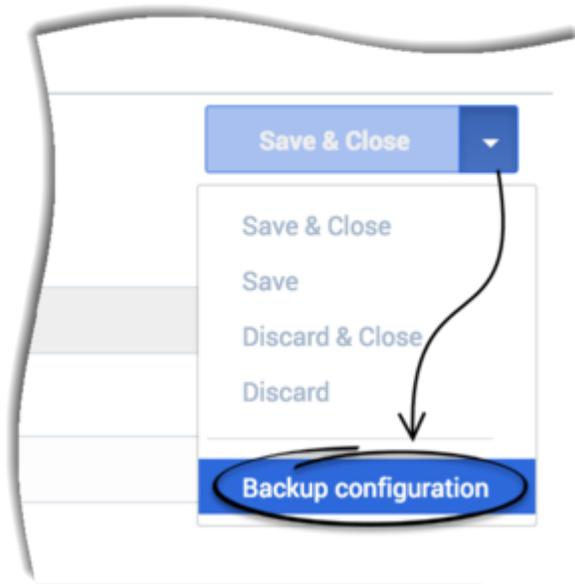


Importing knowledge base configuration

Cloning the knowledge base configuration

To re-use the configuration of an existing knowledge base to create a new one you must:

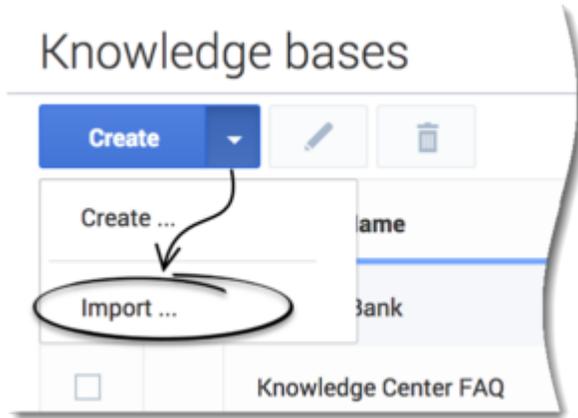
1. Open the list of knowledge bases.
2. Open the knowledge base you wish to clone.
3. Click the drop-down menu next to the **Save & Close** button.
4. Select the **Backup configuration** menu:



5. The browser downloads a text file with the knowledge base configuration (name: `knowledgebaseId + ".scheme"`).



6. Go back to the **Knowledge Bases** page.
7. In the **Create** drop-down menu select the **Import ...** option:



8. Select **Browse**, choose the recently downloaded file in the opened dialog window and then, click **Import**:



9. **For CMS 8.5.304 and later:** The new Knowledge Base form is opened and pre-filled with the values from the loaded knowledge base configuration.

Important

You must change the knowledge base ID. You cannot have more than one knowledge base with the same ID.

Note: In CMS versions earlier than 8.5.304 , you were required to modify the knowledge base ID and properties in the exported file before importing it to the system.