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Genesys Knowledge Center User's Guide

Templates

5/7/2025

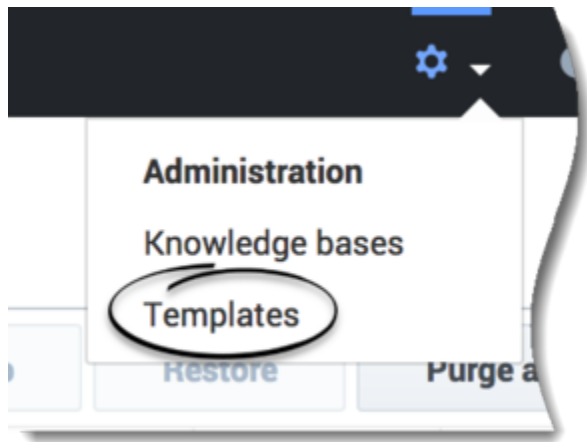
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Templates

Overview

Templates can be accessed by selecting the **Templates** menu from the **Administration** menu:



Document templates allow you to define:

- The desired breakdown (into section) of document content
- Any instructions to authors on the intended use of any of the sections
- Visibility for every section by limiting access to its content to the desired group of users (customer, agent or sub-groups of agents)

To be able to view and manage templates you need to have `Knowledge.CMS.Administrator` privilege (for more details, see [Access Permissions](#)).

Viewing existing templates

When you navigate to templates by selecting **Templates** from the **Administration** menu, CMS will show you the list of templates that are currently available in your system:



From this view you can:

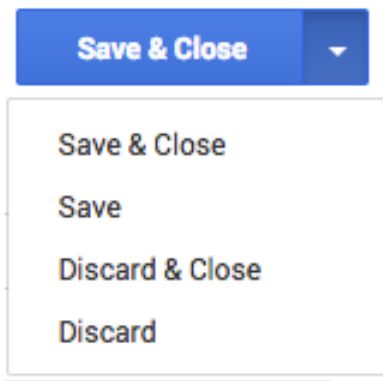
- create new template:
 - from empty template
 - using previously exported template
- modify existing template
- delete existing template
- disable template (to prevent new documents from being created, using this templates)
- see info about how much knowledge bases uses this template in documents (from 9.004.xx version)
- filter out the list of the templates by:
 - template name
 - document type
 - enable/disable status
- sort the template list by:
 - template name
 - modification date
 - number of knowledge bases in use (from 9.004.xx version)

Creating a new template

1. Click **Create**
2. Enter values for the mandatory fields (marked by a red star), as well as any other pertinent fields.

The screenshot shows a configuration form for a template titled "Article with Agent Interaction". At the top right is a "Save & Close" button. The form includes several input fields: "Section article", "Name" (with the value "Article with Agent Interaction"), "Description" (with the value "Common Article document providing public content section and guidance section for the agents"), and "Document type" (with the value "Article"). There is a toggle switch for "Enabled" which is currently turned on. Below these fields is a section titled "Sections" containing two expandable sections. The first section is "Common" (with a "Visibility" toggle set to "Hidden") and contains a text area for "Provide publicly visible content in this section" with a "Public" dropdown menu. The second section is "Guide" (with an "Optional" toggle) and contains a text area for "Provide internal instruction for the agent on the internal systems used" with an "Agents only" dropdown menu. At the bottom left of the form is a link that says "Add section".

3. Click **Save & Close** or select one of the other options from the **Save & Close** drop-down menu.



Standards templates

When you start CMS for the first time you will see two templates already created for you:

- **Standard Article**
- **Standard FAQ**

Both these templates are created by default and configured to have one public section. You can redefine these templates according to your needs.

Important

The template can be changed or deleted if there are no documents in your knowledge bases that are using it.

Tip

You can disable the template to prevent it from being used by authors to create new documents.

Templates explained

Field	Description
Id	<p>Allows you to define a unique technical name for templates. This name is used when you export or import any templates or documents using it.</p> <p>Id restrictions:</p> <ul style="list-style-type: none"> • It is not allowed to have two templates with same id. • Only [a-z][A-Z][0-9]_ - characters allowed to be used in the id. • Id cannot be modified one document is created.
Name	Defines the name that authors can chose from when they are creating new documents.
Description	Provides a short explanation on how the template is used. It is shown to the authors when they create a new document.
Document type	<p>Allows you to select one of the basic document types that are extended with the templates. Supported types are:</p> <ul style="list-style-type: none"> • Article • FAQ
Enable	Allows you to enable or disable templates used by the authors. If templates are disabled all existing documents that are using templates will continue to function as is however authors will not be able to create any new documents using this template.
Sections	<p>Define the content parts of which the final document content is compiled. The order of these sections is essential. Knowledge Center uses a defined order to combine content together before showing it to an agent or a customer.</p> <div> <p>Important</p> <p>Every template must have at least one section.</p> </div>

Field	Description
	<p>For every section you are able to provide:</p> <ul style="list-style-type: none"> • name - visible for authors only when editing the document in CMS • instruction - visible for authors only when editing the document in CMS • mandatory flag that will instruct CMS that document cannot be sent for approval until content for this section is provided. • visibility rule <p>Important At least one section in document must be mandatory.</p> <p>A section can be:</p> <ul style="list-style-type: none"> • Public - visible to any user • Agents only - visible to any agent, but hidden when customer views the document • Skilled agent - visible to certain set of the agent that has one of the defined skills <p>Important When a template is used within a knowledge base, the Reading access defined for the knowledge base is what's used to set the priority for the section visibility. For example, if you have a template with "Public" sections within a knowledge base that are set to "Agent only" for Reading access, it results in all those sections within the document being visible to agents only. In this instance however, because of the priority set, this also means that none of the documents within this knowledge base are accessible by the customers.</p>

While editing templates, you can:

- Add a section by clicking the **Add section** link:

Templates

Article

Enabled

Sections

Document section 1 Mandatory

Instruction

Public

Add section

- Delete a section by clicking:

Sections

Document section 1 Optional

Instruction

Public

Document section 2 Optional

Instruction

Skilled agent Add Skill

Document Section 3 Optional

Instruction

Public

Document Section 4 Optional

Instruction

Public

Add section

- change the order of the section by dragging and dropping them into the desired order. Hover your cursor over the



icon in front of any section then click, hold, and drag to the proper location, and then release your cursor.

Templates

Sections

Document section 1

Optional

Instruction

Public

Document section 2

Optional

Instruction

Skilled agent

Add Skill

Document Section 3

Optional

Instruction

Public

Document Section 4

Optional

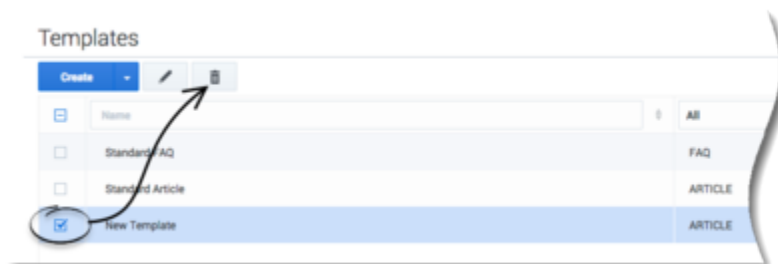
Instruction

Public

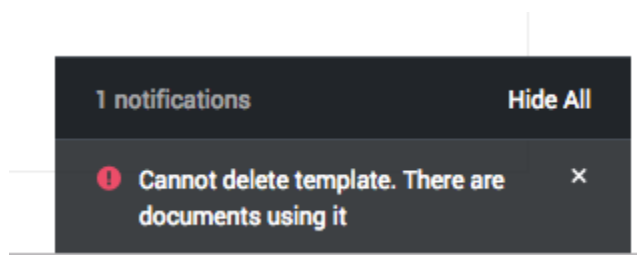
Add section

Deleting templates

You can delete templates by selecting the template from the list and then clicking on delete button:

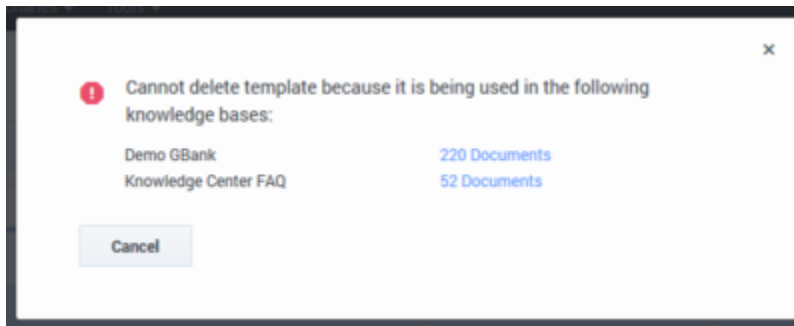


Note: You cannot delete a template that is used in a document within your knowledge bases. Until version 9.003.xx, when trying to delete such a template, the CMS displays the following error message:

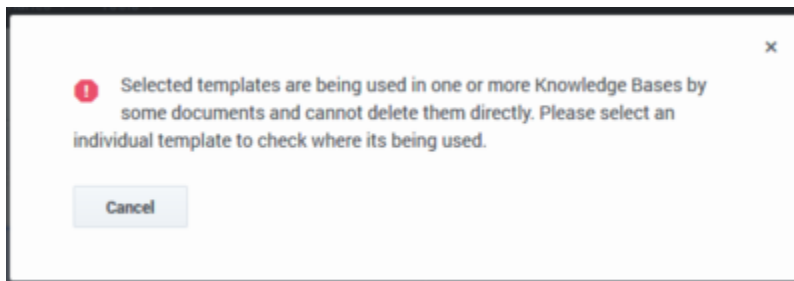


As of version 9.004.xx, the CMS displays the following message containing information about which

knowledge bases this template was used in, as well as the number of related documents the template affects:



Clicking on the number of documents switches you to the appropriate knowledge base where you can manage your documents before deleting the templates. When attempting to delete several templates with related documents, the CMS displays the following message:



Rather than deleting such templates, you can disable them. This prevents the template from being used when creating new documents.

Tip

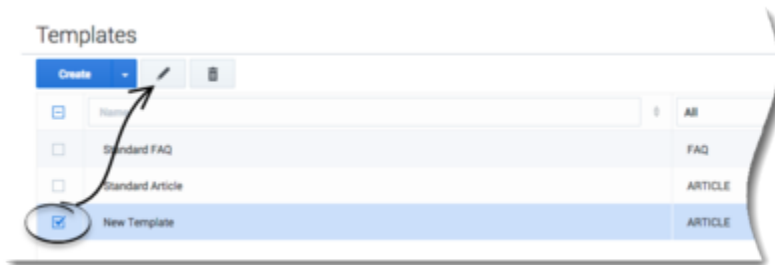
Disabling a template does not disable, hide, or remove any content from the Knowledge Base and the content can still be updated. Disabling a template only prevents the creation of new content with that template.

Important

Ensure that at least one template is created and enabled for every document type. Disabling all templates for certain document types disables the ability to add these documents to your knowledge bases.

Modifying templates

To modify a template, select the template and then click the **edit** button:

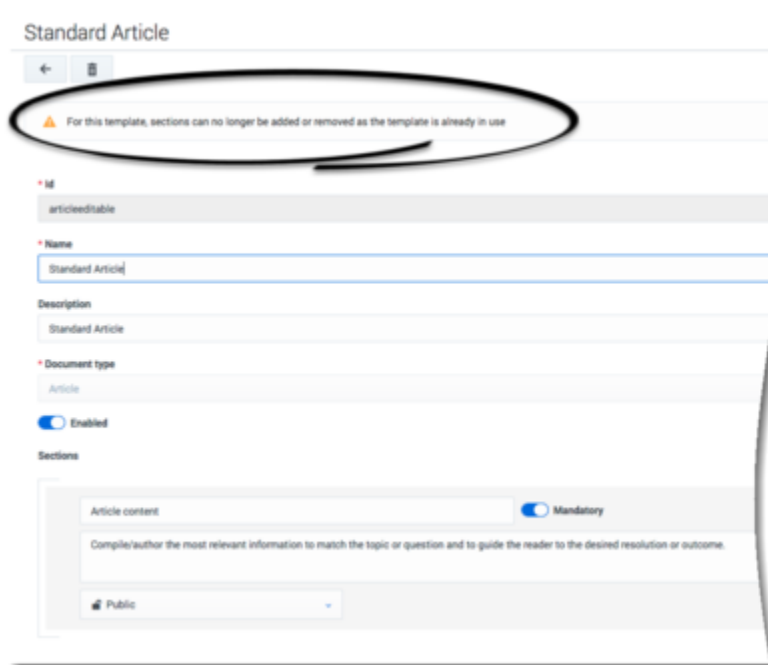


Alternatively, you can double-click on the template to enter edit view.

There are certain restrictions on the editing templates:

- The template **Id** and **Document type** can be defined before the template is created but cannot be changed afterward.
- **Sections** can be added and removed while there is no documents using this template. As soon as you have created at least one document using the template, you cannot add or delete sections within the document. You can however still change the order of the existing sections and change their attributes (such as **Name**, **Instruction**, **Mandatory** flag and visibility).

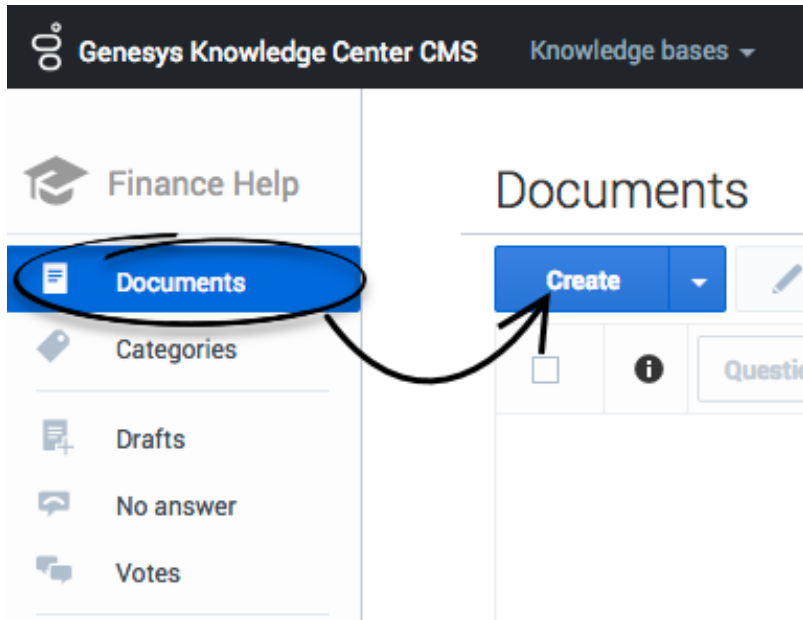
Templates that have restrictions on the modification will have special notice (1) shown when entering the edit mode:



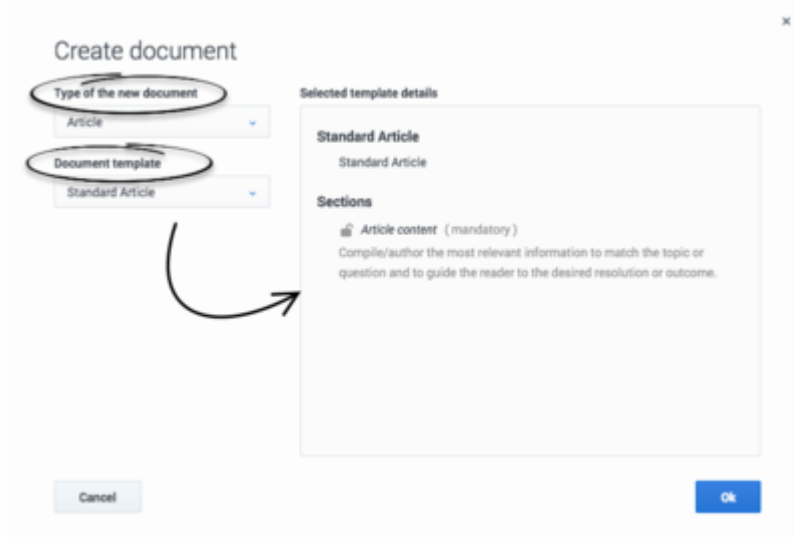
Using templates

When you add a document to the knowledge base you are able to select a template to use for that document.

1. From the *Documents* view click the **Create** button:



2. From the **Create document** window, choose the **Document type** and **Document template**. Once these fields are chosen, the template information is shown on the right of the window (Template name and description, list of the sections with their names, instructions, visibilities):



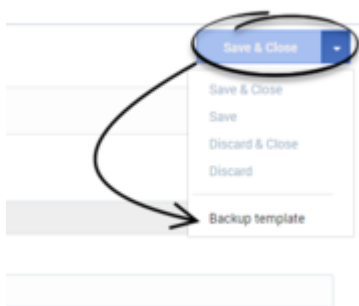
3. Click **Ok** to create the document.

Importing templates

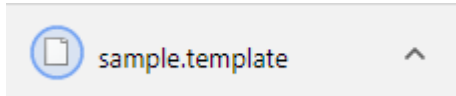
Cloning Template

To re-use an existing template to create a new one you must:

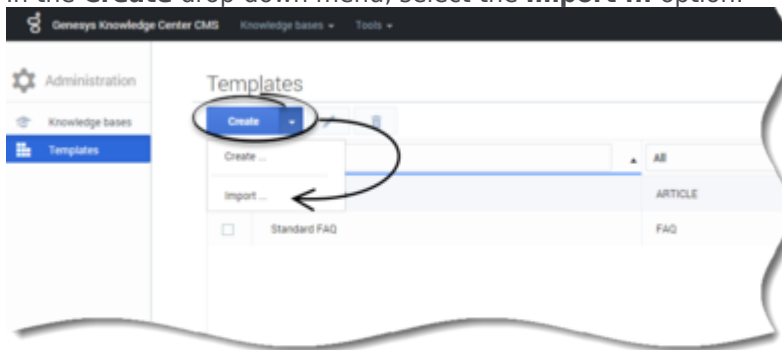
1. Open the list of templates.
2. Open the template you wish to clone.
3. Click the drop-down menu next to the **Save & Close** button.
4. Select **Backup configuration**:



5. The browser downloads a text file with the template configuration (name: templateId + ".template").



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



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



9. The new template form is opened and pre-filled with the values from the loaded knowledge base configuration.

Important

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