Genesys Knowledge Center Deployment Guide

Installing the Knowledge Center CMS

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Installing the Knowledge Center CMS

This chapter describes the process of installing and configuring Knowledge Center CMS that includes following steps:

- Importing the CMS Application Template
- Creating and configuring CMS Application in Genesys Administrator
- Configuring the Data Source
- Installing the CMS
- Granting your agents authoring privileges
- Starting/Stopping the installed CMS application

Before you proceed with these steps you need:

- Configure Knowledge Center Cluster application
- Select and install one of the Relational Database Management Systems (RDBMS) from the supported link
- Configure the load-balancer for access to CMS

Knowledge Center CMS support one of the following RDBMS as persistent storage:

- Microsoft SQL Server 2012
- Oracle 11g
- PostgreSQL

Install the CMS

Import the CMS Application Template

Start

1. Open Genesys Administrator and navigate to **Provisioning > Environment > Application Templates**.
2. In the **Tasks** panel, click **Upload Template**.
3. In the **Click 'Add' and choose application template (APD) file to import** window, click **Add**.
4. Browse to the *Knowledge_Center_CMS.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.
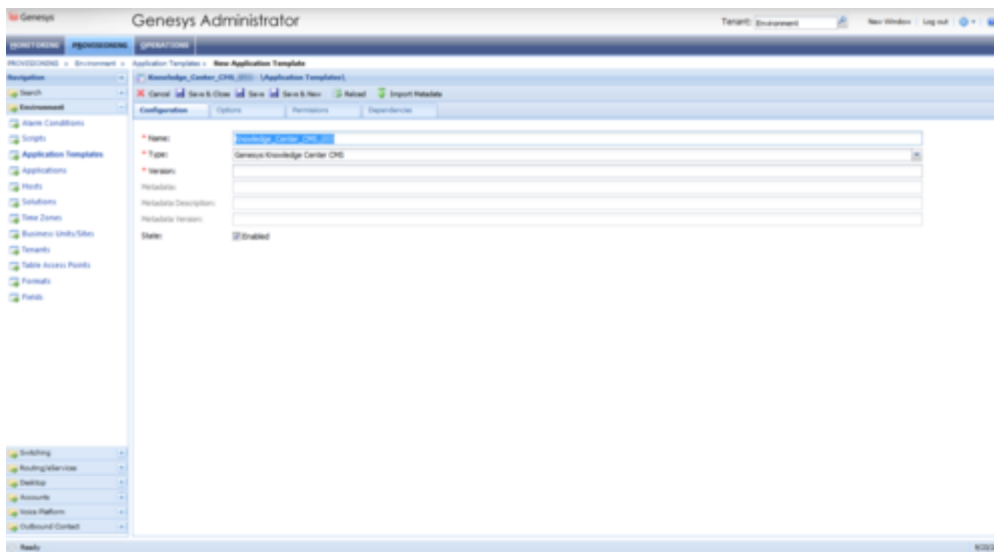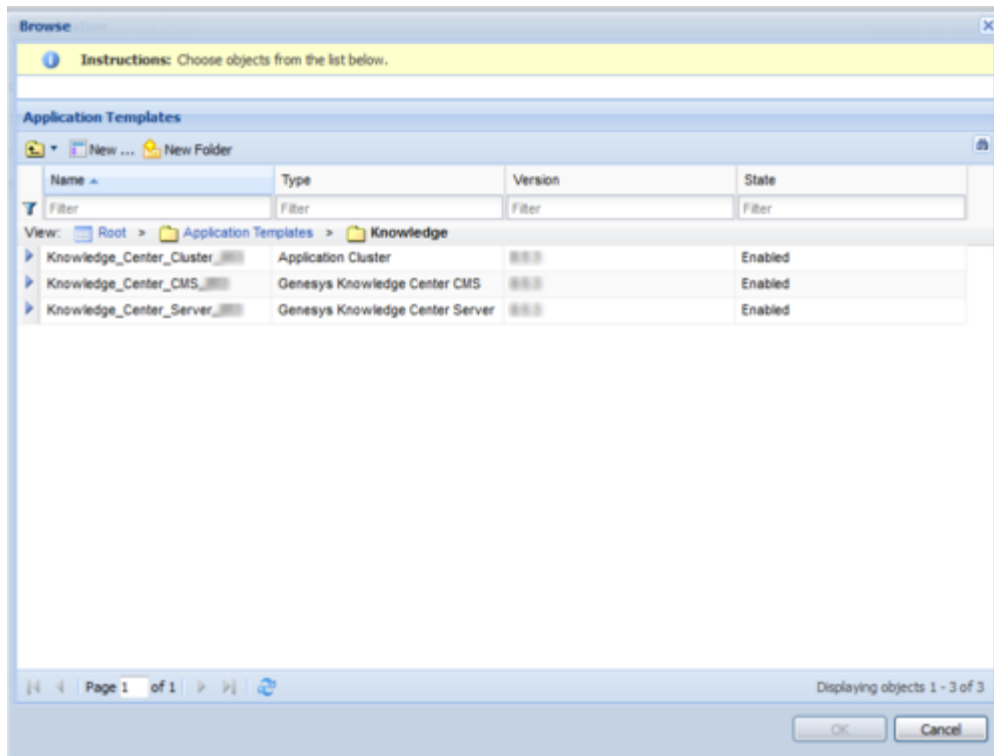
The Knowledge Center CMS Application Template

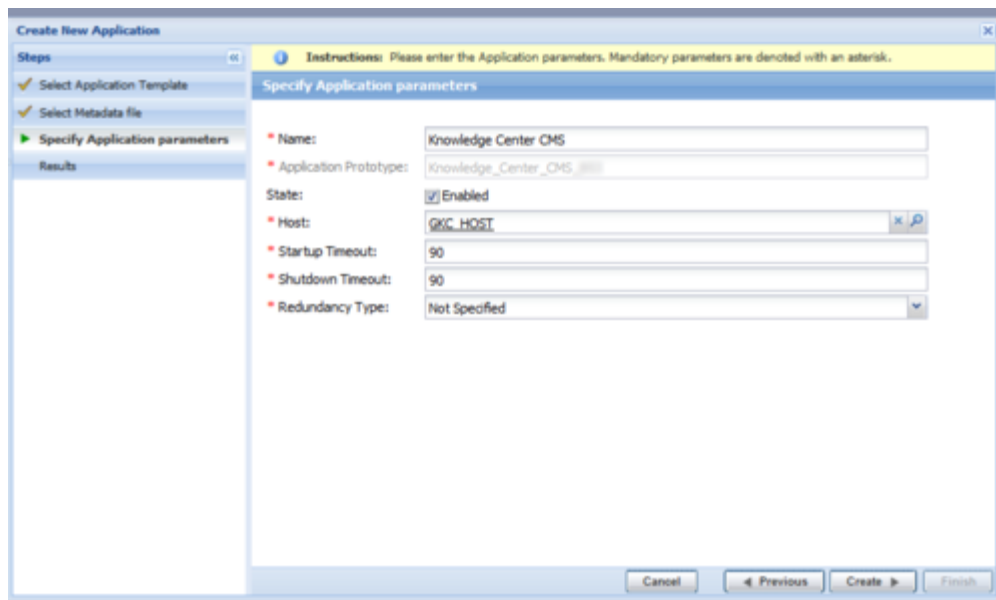5. Click **Save and Close**.

End

Create CMS Applications

Start

1. Open Genesys Administrator and navigate to **Provisioning > Environment > Applications**.

2. In the **Tasks** panel, click **Create New Application**.

3. In the **Select Application Template** panel, click **Browse for Template** and select the Genesys Knowledge Center CMS application template that you imported earlier. Click **OK**.
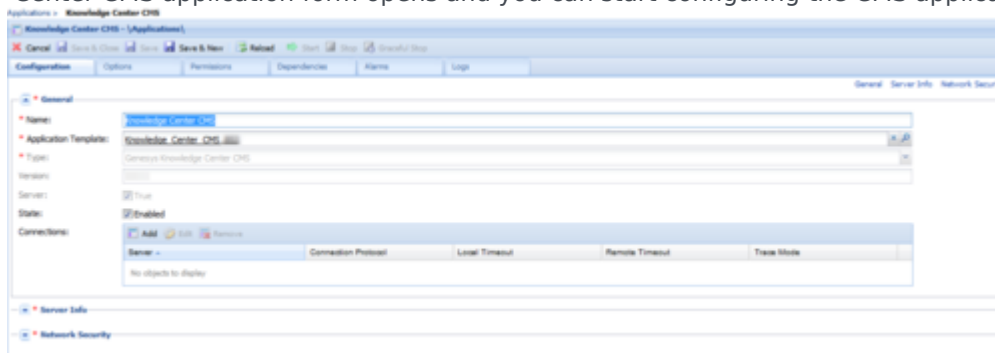
Selecting the Knowledge Center CMS Template

4. The template is added to the **Select Application Template** panel. Click **Next**.

5. In the **Select Metadata** file panel, click **Browse** and select the *Knowledge_Center_CMS.xml* file. Click **Open**.

6. The metadata file is added to the **Select Metadata** file panel. Click Next.

7. In **Specify the appropriate application parameters**:

   a. Enter a name for your application. For instance, *Knowledge Center CMS*.

   b. Enable the **State**.

   c. Select the Host on which the CMS will reside.

   d. Click **Create**.

Creating the Knowledge Center CMS Application

5. The **Results** panel opens.

6. Enable **Opens the Application details form after clicking 'Finish'** and click **Finish**. The Knowledge Center CMS application form opens and you can start configuring the CMS application.
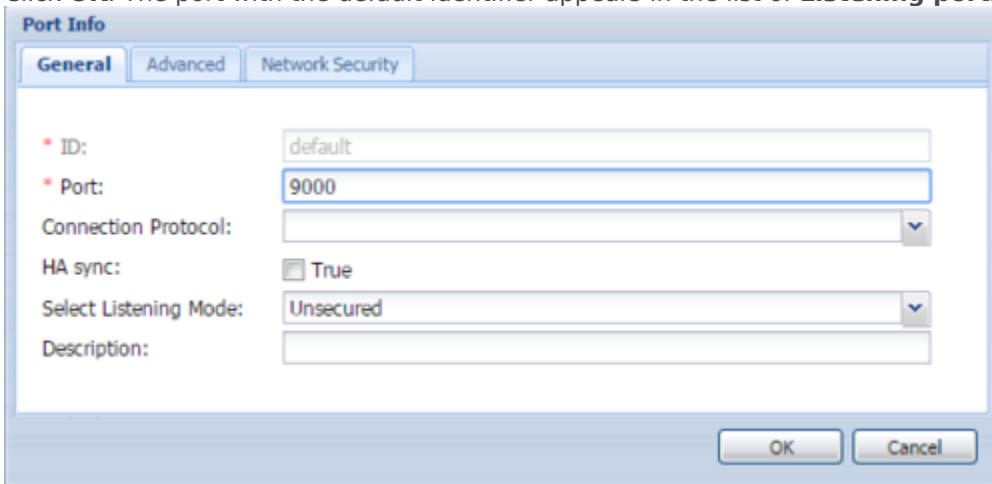

Configuring the Knowledge Center CMS

End

Configure the CMS Application

Start

1. If your Knowledge Center CMS application form is not open in Genesys Administrator, navigate to **Provisioning > Environment > Applications**. Select the application defined for the Knowledge Center CMS and click **Edit...**.

2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens.

3. Select the Knowledge Center Cluster application, then click **OK**.

4. Expand the **Server Info** pane.

5. If your Host is not defined, click the lookup icon to browse to the hostname of your application.

6. In the **Listening Ports** section, create the default port by clicking **Add**. The **Port Info** dialog opens.

    a. Enter the **Port**. For instance, 9000.

    b. Choose *http* or "https" for the **Connection Protocol**.

    c. If you will be using a secure connection to the cluster, choose *Secured* for the **Select Listening Mode**.

    d. Click **OK**. The port with the default identifier appears in the list of **Listening ports**.
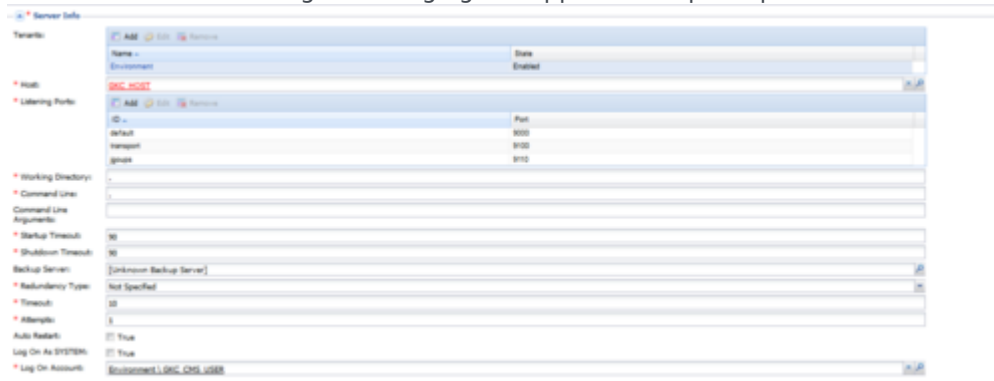
Knowledge Center CMS Port Information

7. Add a port that will be used by Knowledge Center CMS nodes to communicate to each other by clicking on **Add** and:

    a. entering *clustering* in the **ID** field

    b. entering the **Port**. For instance, 9150.

    c. Clicking **OK**

8. In the **Tenants** section, add a working tenant by clicking **Add**. Browse and choose the appropriate tenant in the pop-up dialog. Click **OK**.

9. Uncheck **Log On As SYSTEM**.

10. In **Log On Account** specify the user account that:

    • has the ability to view access groups (this is required if you use access groups to set privileges for your agents)

    • has **Knowledge.AUTHOR** (Allows agent to change data in a knowledge base) privilege and **Knowledge.MULTITENANT** (Allows to bypass tenants restrictions) in case multi-tenant configuration (required for scheduled synchronization)

    • User should have access to the same tenant/tenants in which that CMS is configured

    • User should be granted "Read and Execute (RX)" and "Read Permissions (E)" permissions for Environment tenant, if the application configured not in the Environment tenant; user should belong to Administrators Access Group in CMS tenants (required for scheduled synchronization)

14. Click **Save**.

15. The **Confirmation** dialog for changing the application's port opens. Click **Yes**.

Knowledge Center CMS Information

16. Go to **Application Cluster** application, open **Options** tab. In section cms.general set valid URL to CMS or CMS cluster load balancer in externalURL option (for example, http://<cms host>:<CMS default port>/gks-cms).

End

Configure Data Source

Knowledge Center CMS requires persistent storage to be configured to store all the authored content. Please follow one of the instructions to set up storage of your choice:
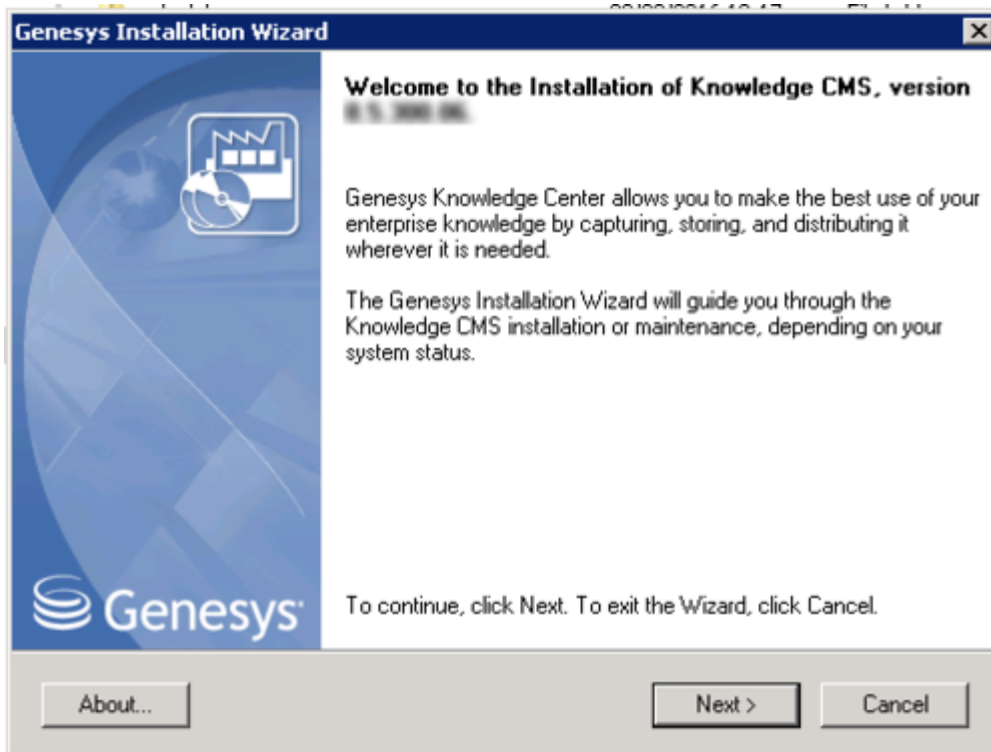
- Microsoft SQL Server - Using CMS with Microsoft SQL Server
- Oracle - Using CMS with Oracle
- PostgreSQL - Using CMS with PostgreSQL

Installing the CMS

Windows Installation Procedure

Start

1. In your installation package, locate and double-click the *setup.exe* file. The Install Shield opens the welcome screen.
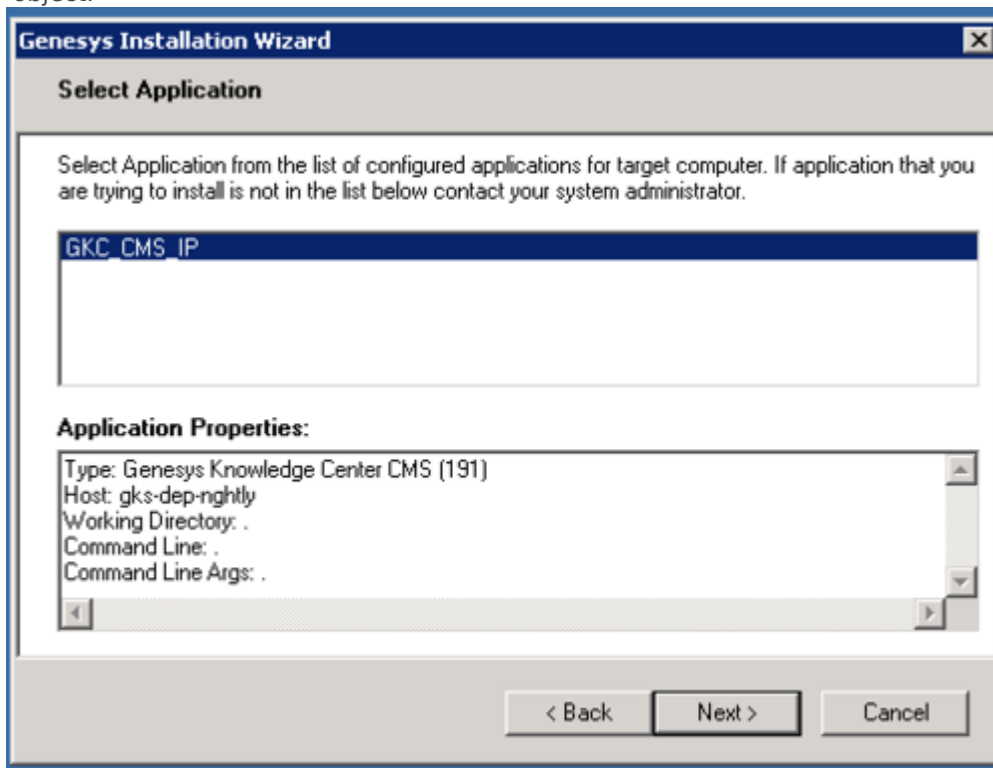
Knowledge Center CMS installation Window

2. Click **Next**. The **Connection Parameters to the Configuration Server** screen appears.

Knowledge Center CMS Connection Parameters

3. Under **Host**, specify the host name and port number where Configuration Server is running. (This is the main listening port entered in the **Server Info** tab for Configuration Server.)

4. Under **User**, enter the user name and password for logging in to Configuration Server.

5. Click **Next**. The **Select Application** screen appears.

6. Select the Knowledge Center CMS that you are installing. The **Application Properties** area shows the **Type**, **Host**, **Working Directory**, **Command Line executable**, and **Command Line Arguments** information previously entered in the **Server Info** and **Start Info** tabs of the selected application object.

Selecting the Knowledge Center CMS Application

7. Click **Next**. The **Choose Destination Location** screen appears.

8. Under **Destination Folder**, keep the default value or browse for the desired installation location.
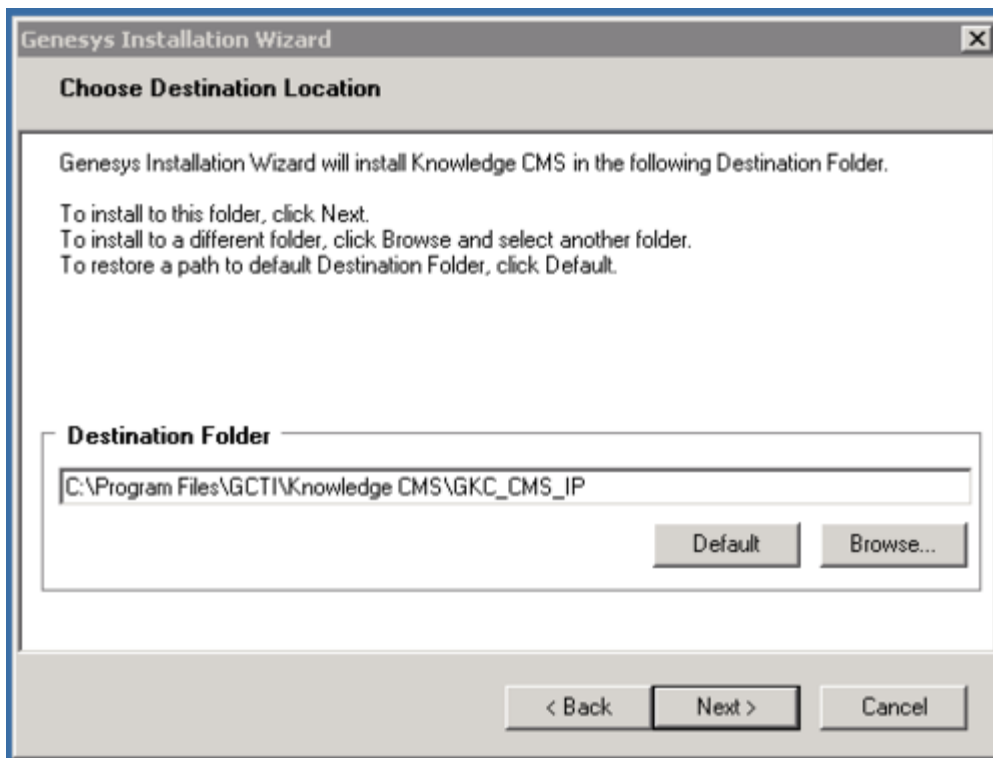
Choosing the Knowledge Center CMS Installation Destination

9. Click **Next**. Choose the appropriate version of the Java JDK.
   Note: Knowledge Center Server requires Java 1.8 or higher.

Selecting the Knowledge Center CMS Java Version

10. Click **Next**. The **Ready to Install** screen appears.

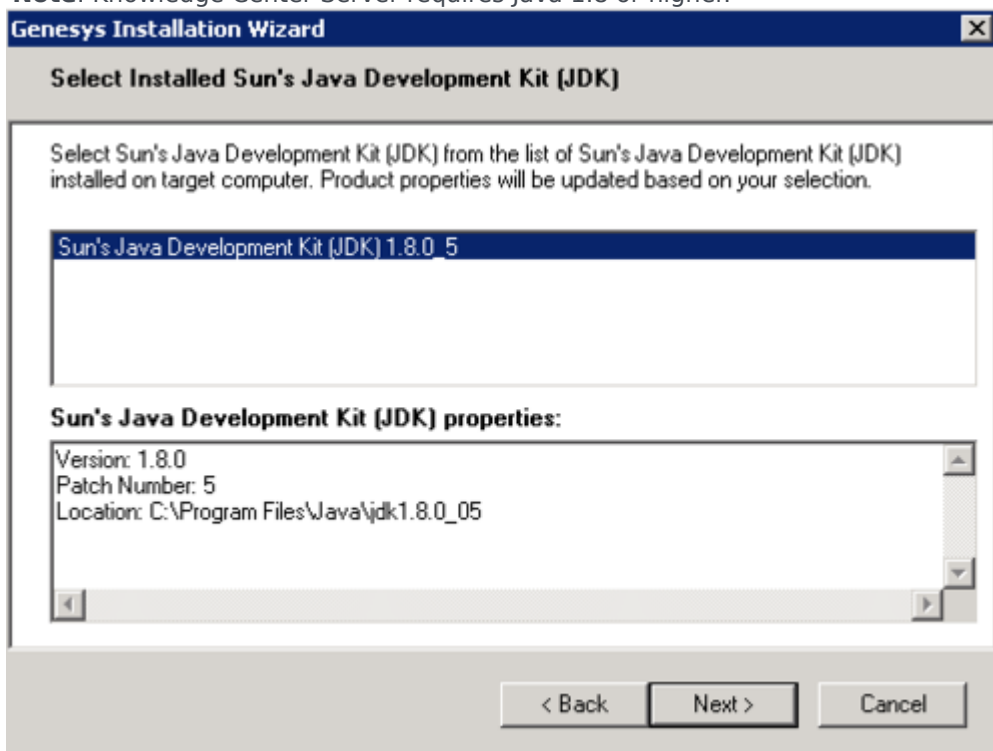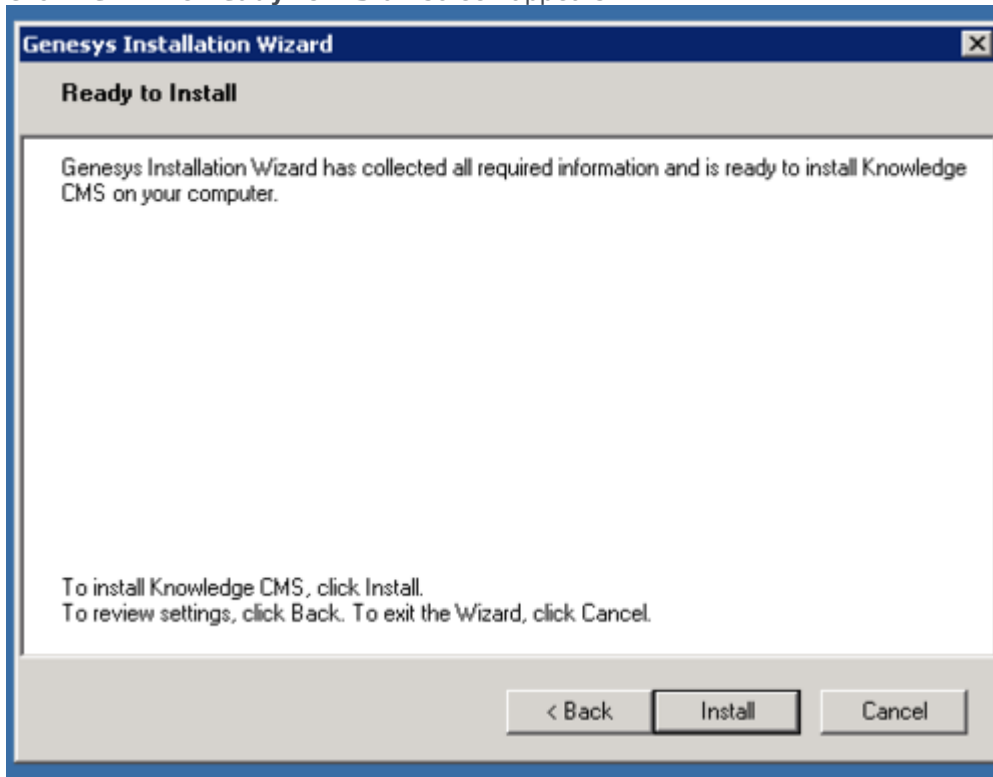Knowledge Center Knowledge Center is Ready to Install

11. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Genesys Knowledge Center CMS. When through, the **Installation Complete** screen appears.

12. Click **Finish** to complete your installation.

13. Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.

End

Linux Installation Procedure

Start

1. Open a terminal in the CMS installation package, and run the *install.sh* file. The Genesys installation starts.

2. Enter the hostname of the host on which you are going to install.

3. Enter the connection information required to log in to the Configuration Server:

   a. **Hostname**—For instance, *demosrv.genesyslab.com*

   b. **Listening port**—For instance, *2020*

   c. **User name**—For instance, *demo*

   d. **Password**

4. If you have a backup Configuration Server, enter the Host name and Port.

5. If the connection settings are successful, a list of keys and Knowledge Center CMS applications is displayed.

6. Enter the key for the Knowledge Center CMS application that you created previously in Configuration Server.

7. Enter the full path to your installation directory and confirm that it is correct.

8. If the installation is successful, the console displays the following message:
   Installation of Genesys Knowledge CMS has completed successfully.

End

Installing multiple CMS instances

To install multiple CMS instances you need to repeat following steps for every instance:

1. Create CMS applications
2. Configuring the Knowledge Center CMS Application
3. Installing Knowledge Center CMS

Note: Knowledge Center Cluster Application is created just ones for all CMS instances working in the same cluster.

Granting Agents Authoring Privileges

Genesys Knowledge Center supports the following privileges to restrict agent access:

- Administrator (allows a user to carry out Administrator tasks such as creating and editing Knowledge bases)
- Approver (allows a user to Approve and Publish documents)
- Category Author (allows a user to create and update categories)
- Document Author (allows a user to create and update documents)
- Multitenant user (allows a user to work with data in all tenants in the CMS)

Important

Only agents who have both Document Author and Category Author privileges can successfully import data from XML files into CMS.
To publish document from CMS to Knowledge Server agent also should have "Allows

> agent to change data in a knowledge base" privilege on Knowledge Server (link to Provide Knowledge Center Access to Agents in Server installation page)

To configure the appropriate privileges for an agent:

Start

1. Go to **Provisioning > Accounts > Roles.**
2. In the taskbar, click **New** to create a new object.
3. Set the name of the role in the **General** section.
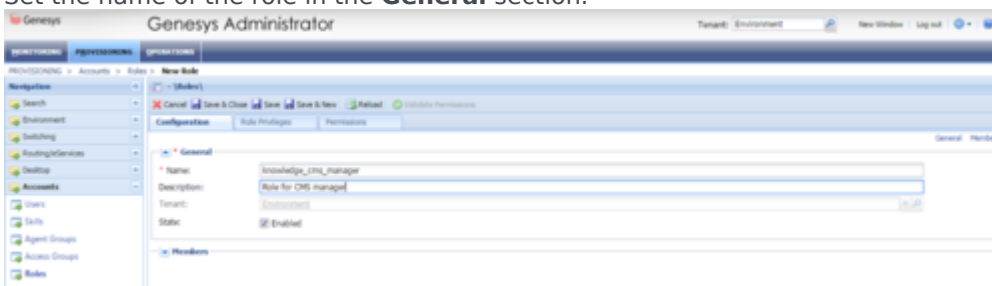
Knowledge Center CMS Access Roles

4. Go to the **Role Privileges** tab and select the set of roles for Genesys Knowledge Center.
5. Open the Genesys Knowledge Center CMS privileges list.
6. Set the appropriate privileges to **Allowed**.
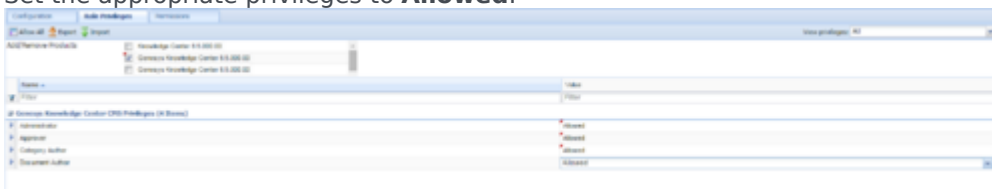
Setting Knowledge Center CMS Access Privileges

7. Go back to the **Configuration** tab.
8. In the **Members Section**, add the appropriate Agent by clicking the **Add** button.
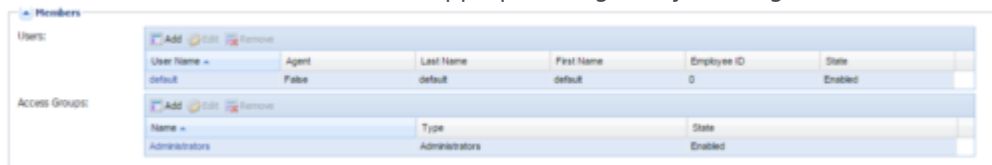
Knowledge Center CMS Members Section

9. Save and Close.

End

Start and Stop Genesys Knowledge Center CMS

Start the CMS

Windows:

> **Important**
> You can start the Genesys Knowledge Center CMS on Windows from:
>
> - Windows Services
> - the server.bat script
> - Genesys Administrator

Start

- You can start the server from Windows Services.
    1. Open Windows Services
    2. Select and start the Genesys Knowledge Center CMS [Knowledge Center CMS] service.
- You can use the provided server.bat script.
    1. Navigate to the Knowledge Center CMS installation server directory and launch the Windows command console (cmd.exe).
    2. Open server directory
    3. Type and execute server.bat, without any parameters.

    > **Important**
    > You can use entry in the Start > All Programs > Genesys Solutions > Knowledge Center CMS [Knowledge Center CMS] menu to start the Server using server.bat

- You can start the server from Genesys Administrator.
    1. Navigate to PROVISIONING > Environment > Applications.
    2. Select the Knowledge Center CMS
    3. Click Start applications in the Runtime panel.

End

The Genesys Knowledge Center CMS is shown in Started status in Genesys Administrator.

Linux:

> ## Important
>
> You can start the Genesys Knowledge Center CMS on Windows from:
>
> - the server.sh script
> - Genesys Administrator

Start

- You can use the provided server.sh script.
  1. Navigate to the Genesys Knowledge Center CMS installation directory in the Unix command console.
  2. Go to server directory
  3. Type and execute server.sh, without any parameters.
- You can start the server from Genesys Administrator
  1. Navigate to **PROVISIONING** > **Environment** > **Applications**.
  2. Select the Knowledge Center CMS.
  3. Click **Start applications** in the **Runtime** panel.

End
The Genesys Knowledge Center CMS is shown in Started status in Genesys Administrator.

After the CMS start

After successful CMS start you can use following URLs in your browser:

- http://<cms host>:<CMS default port>/gks-cms - to access the CMS user interface

Stop the CMS

Windows:

> ## Important
>
> You can stop the Genesys Knowledge Center CMS on Windows from:
>
> - Windows Services
> - Genesys Administrator

- A console window

Start

- You can stop the server from Windows Services.

  1. Open Windows Services

  2. Select and stop the Knowledge Center CMS service.

- You can stop the server from Genesys Administrator.

  1. Navigate to **PROVISIONING** > **Environment** > **Applications**.

  2. Select the Knowledge Center CMS.

  3. Click **Stop applications** in the **Runtime** panel.

- If you previously started Genesys Knowledge Center CMS in a console window, you can stop the server by closing the window or navigate to Genesys Knowledge Center CMS installation directory in Windows console (cmd.exe), open server directory and execute command: server.bat stop

End
The Genesys Knowledge Center CMS is shown in Stopped status in Genesys Administrator.

Linux:

Important
You can stop the Genesys Knowledge Center CMS on Linux from:

- Genesys Administrator
- A console window

Start

- You can stop the server from Genesys Administrator.

  1. Navigate to **PROVISIONING** > **Environment** > **Applications**.

  2. Select the Knowledge Center CMS.

  3. Click **Stop applications** in the **Runtime** panel.

- Or you can stop the server from the console window where it was started.

  1. Press Ctrl+C while the window is active.

  2. Type Y and press Enter.

- Or you could use provided script server.sh:

    1. Navigate to the Genesys Knowledge Center CMS installation directory in the Unix command console.

    2. Go to server directory

    3. Type and execute server.sh with parameter "stop" (for example: server.sh stop)

End
The Genesys Knowledge Center CMS is shown in Stopped status in Genesys Administrator.