



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Genesys Knowledge Center User's Guide

Working with Categories

12/19/2025

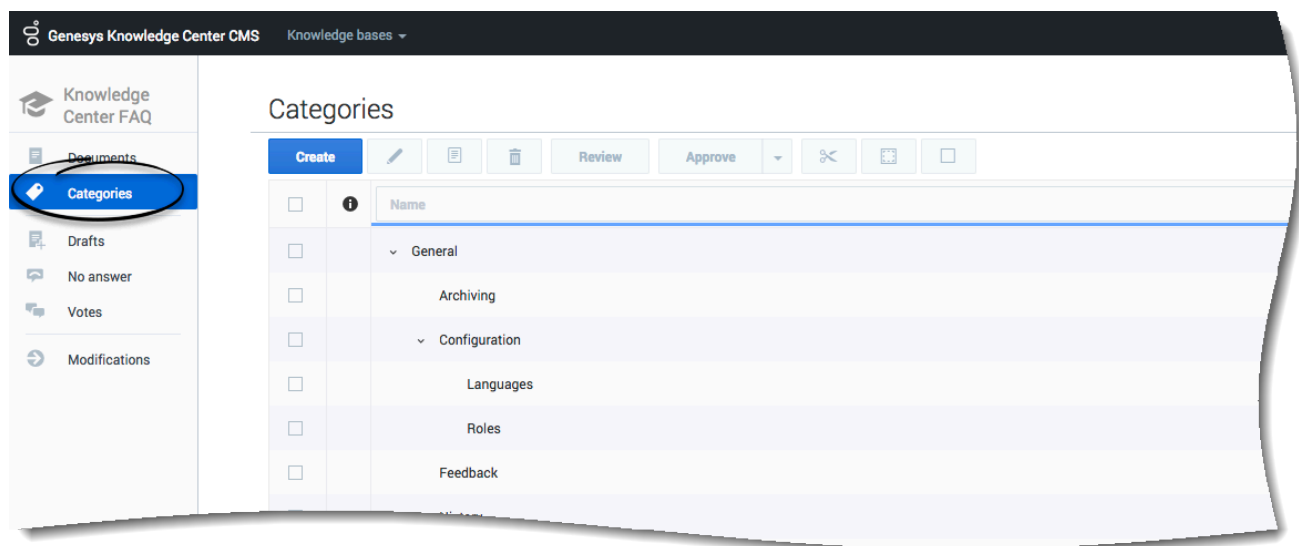
Contents

- 1 Working with Categories
 - 1.1 Displaying categories
 - 1.2 Creating a category
 - 1.3 Category Tree
 - 1.4 Translating categories
 - 1.5 Translate (no source)
 - 1.6 Translate (with source)
 - 1.7 Machine translate
 - 1.8 Translating a category in compare mode
 - 1.9 Category errors
 - 1.10 Viewing a category
 - 1.11 Category history
 - 1.12 Category version rollback
 - 1.13 Comparing category versions

Working with Categories

Displaying categories

Click **Categories** in the sidebar to open the category tree for the selected knowledge base:



Creating a category


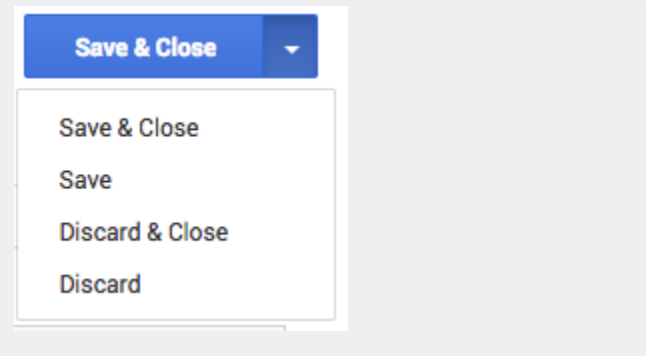
Important

New categories will not be available in the GKC plug-in until they have been assigned to a document.

Create

Click **Create**.

Note: If you select a category from the category list before clicking **Create**, the new category will be created as a child of the category you selected.

	<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 button's drop-down menu.</p>

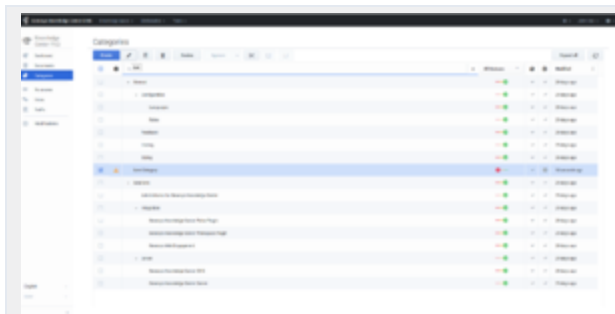
Category Tree

A tree structure represents the hierarchical nature of categories in a graphical form. A Category Tree consists of one or more root categories, each of which can have subcategories under it.

From the category tree you can:

- Create a parent category.
- Move a category.
- Convert a category from child to root.
- Delete a child category.

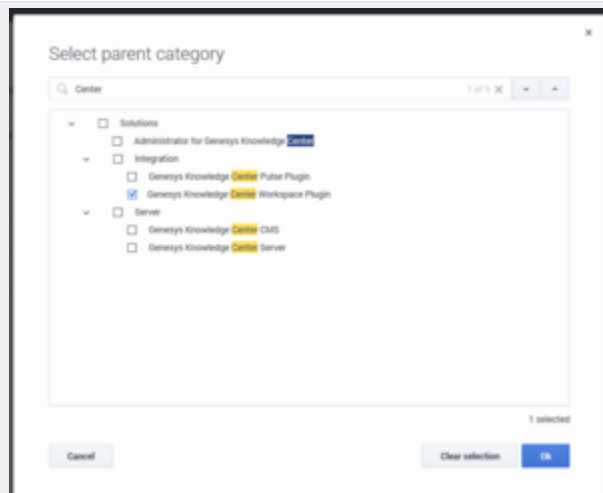
Create a parent category



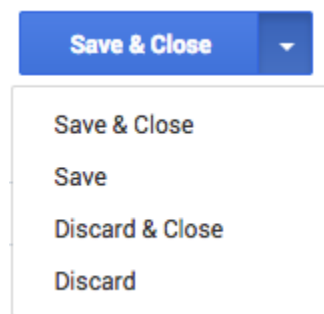
Create a new category or select an existing category to edit.



Click **Edit** > **Parent category**.

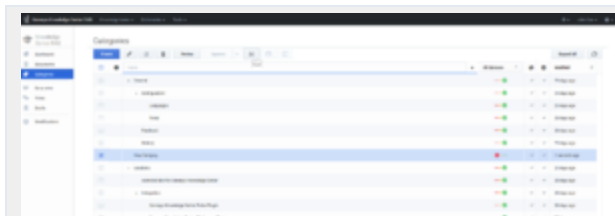


Search for and select one new parent category and click **OK**. You can only select one parent category.

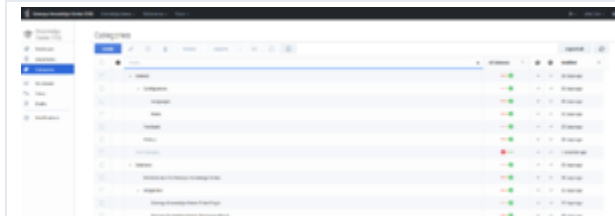


Click **Save & Close** or select a different option from the Save & Close drop-down menu.

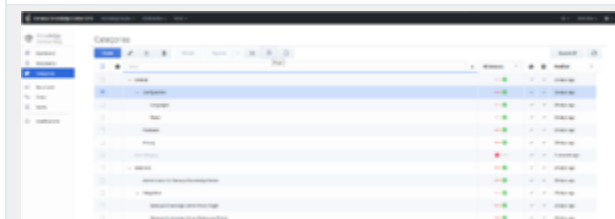
Move a category



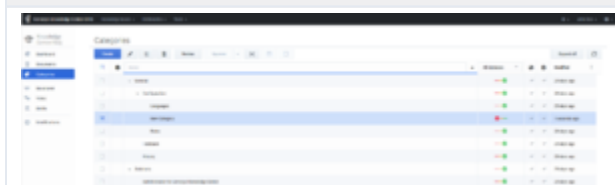
Select a category.



Click the **Cut** button. The selected category will be grayed out.



Select the parent category and click **Paste**.

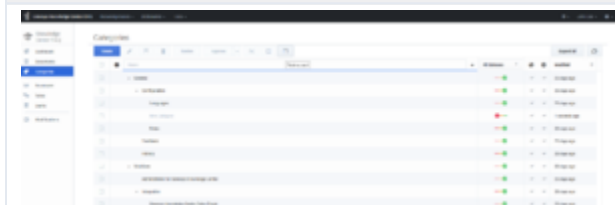


The selected category will be pasted as a child category under its new parent category. If the category that was moved includes child categories, the child categories will also be moved.

Convert a category from child to root



Select category and click the **Cut** button. The selected category will be grayed out.

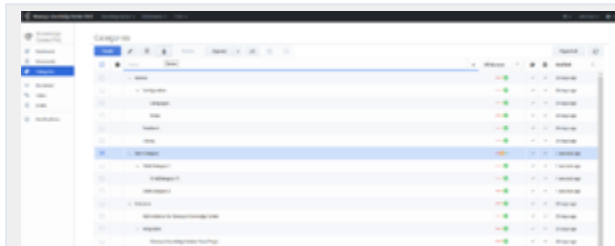


Click **Paste as root**.

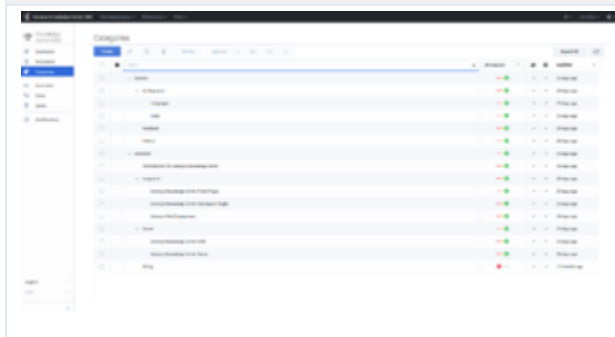


The selected category will now be at the root level. If the converted category includes child categories/subtrees, the categories/subtrees will also be moved.

Delete a child category



Select the child category and click **Delete**.



If the deleted category contains child categories, these child categories will also be deleted.

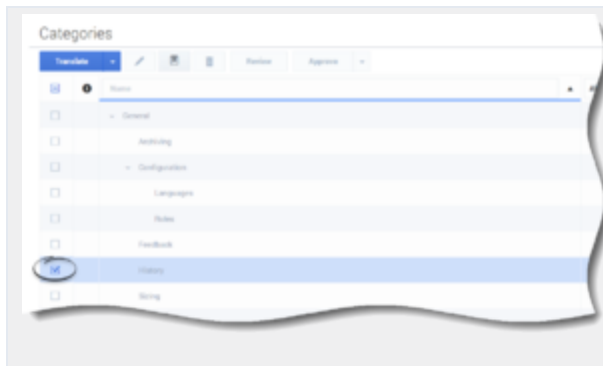
Translating categories

For a quick reference on how to:

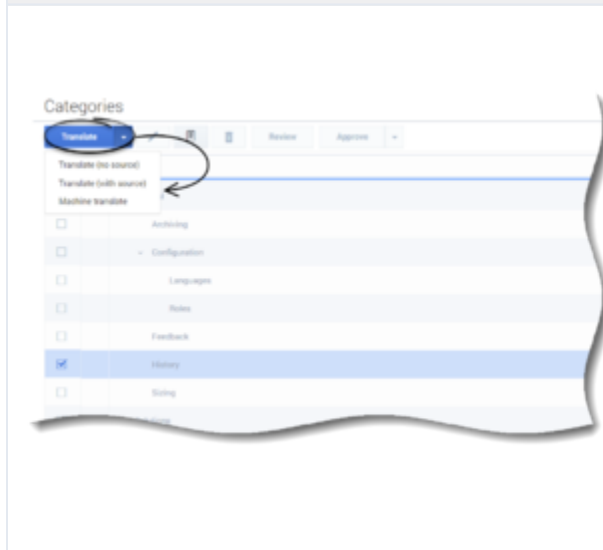
- [Translate \(no source\)](#)
- [Translate \(with source\)](#)
- [Machine translate](#)
- [Translating a category in compare mode](#)

You can reference the video below. Although the information in the video pertains to translating **Documents**, much of the process is the same —

[Link to video](#)



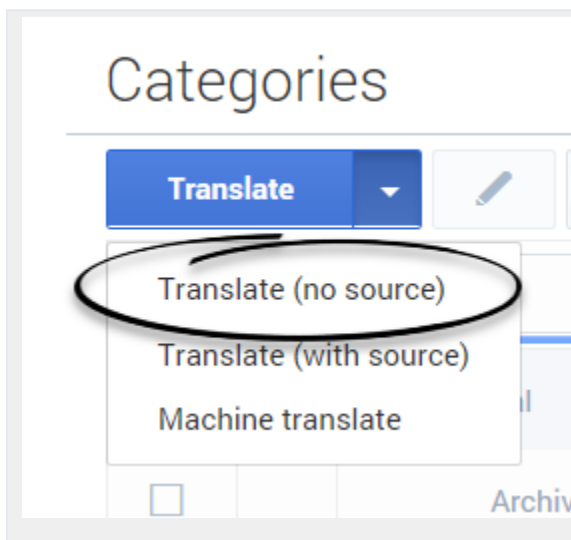
Select a category to translate to the current language.



Click the arrow next to the **Translate** menu and choose one of the three types of translations from the list:

- **Translate (no source)** - Creates a blank category in the selected language for manual translation.
- **Translate (with source)** - Creates a copy of the source category, 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 category in the selected language by translating the content of the original category.

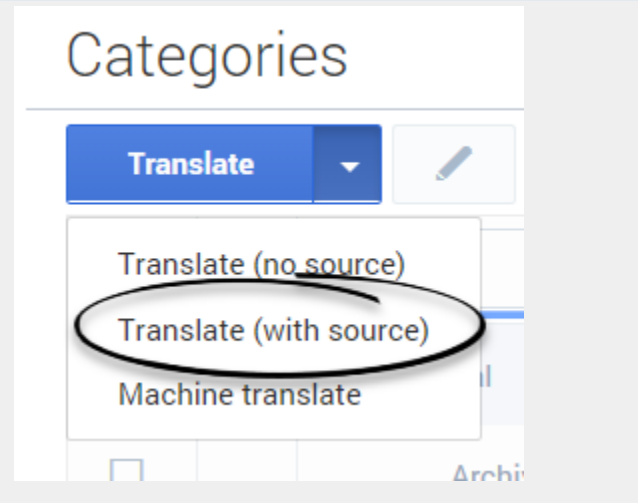
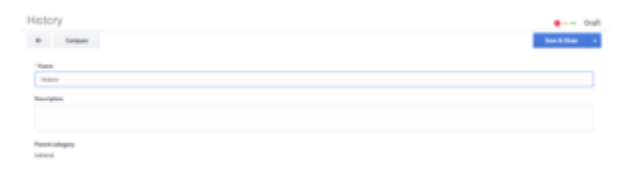
Translate (no source)

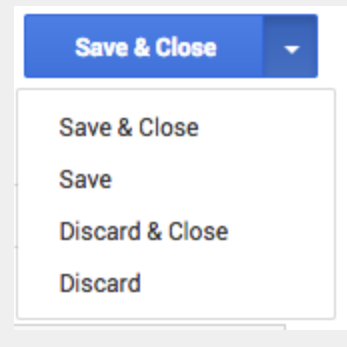


Click the arrow next to the **Translate** button in the toolbar and choose **Translate (no source)** from the menu.

	<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)

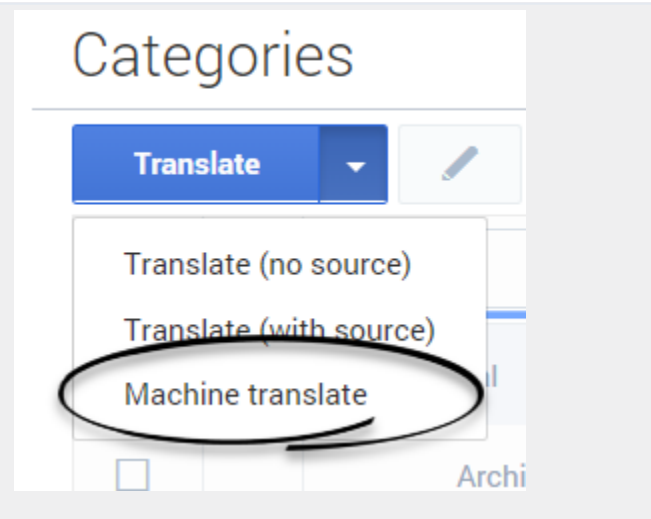
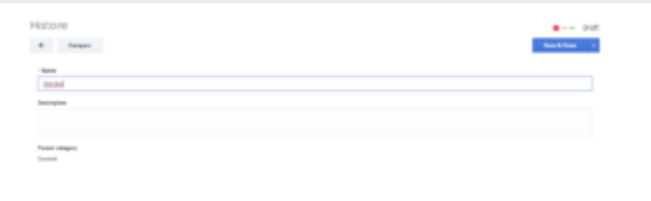
	<p>Click the arrow next to the Translate button in the toolbar and choose Translate (with source) from the menu.</p>
	<p>Manually translate the document fields using the source document content.</p>

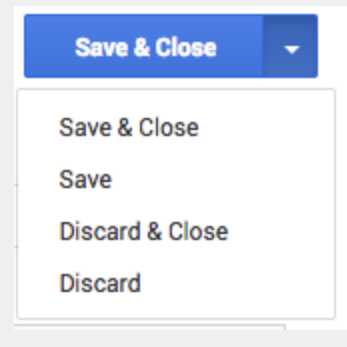
	<p>Click Save & Close or select one of the other options in the Save & Close menu.</p>
---	--

Machine translate

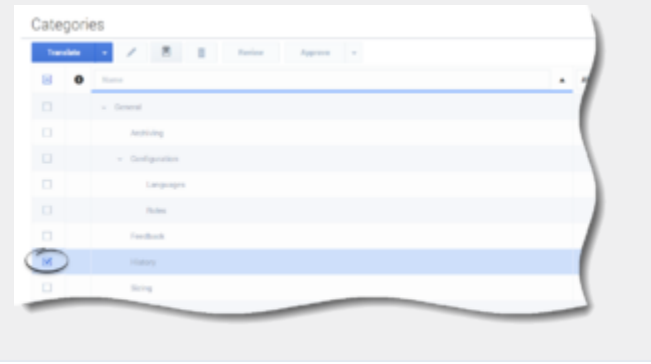
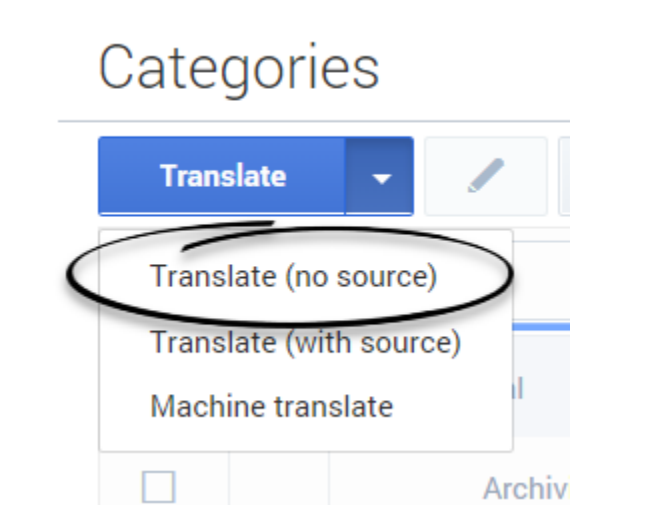
Important



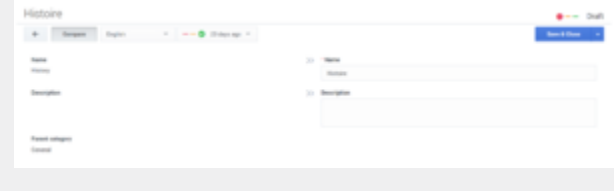
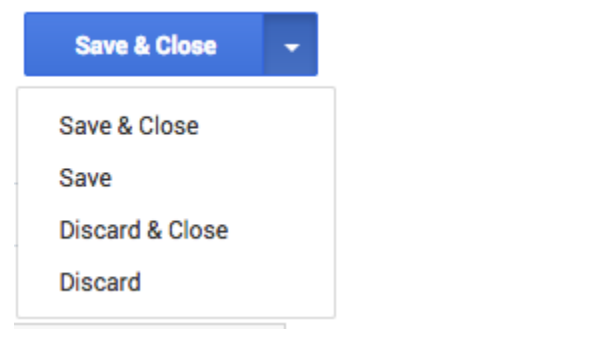
This mode of translation is only available when your administrator has configured an external translation service to translate content.

	<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 category in compare mode

	<p>Select a category 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 Category 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>

Category errors

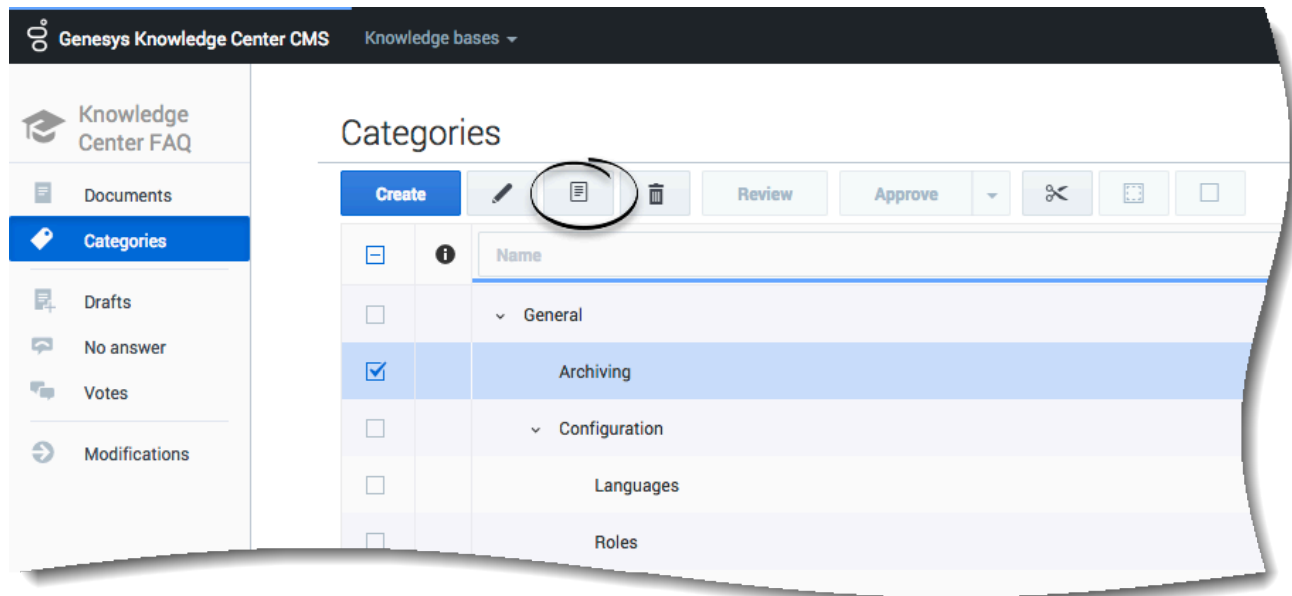
When you save a category, the Knowledge Center CMS validates the values you have entered into its fields. It highlights any fields that contain errors by:

- Marking their borders in red
- Adding an error message below them

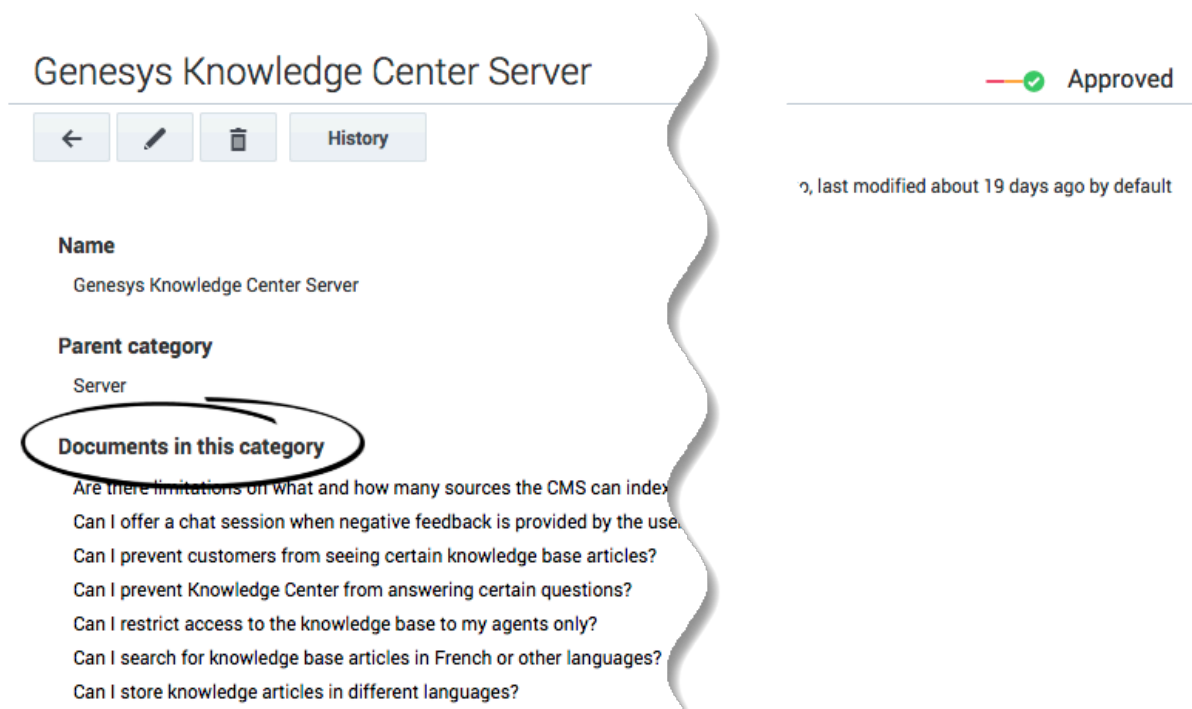


Viewing a category

To view the properties of a category, double-click the category in a list view or select the category and click **View**:



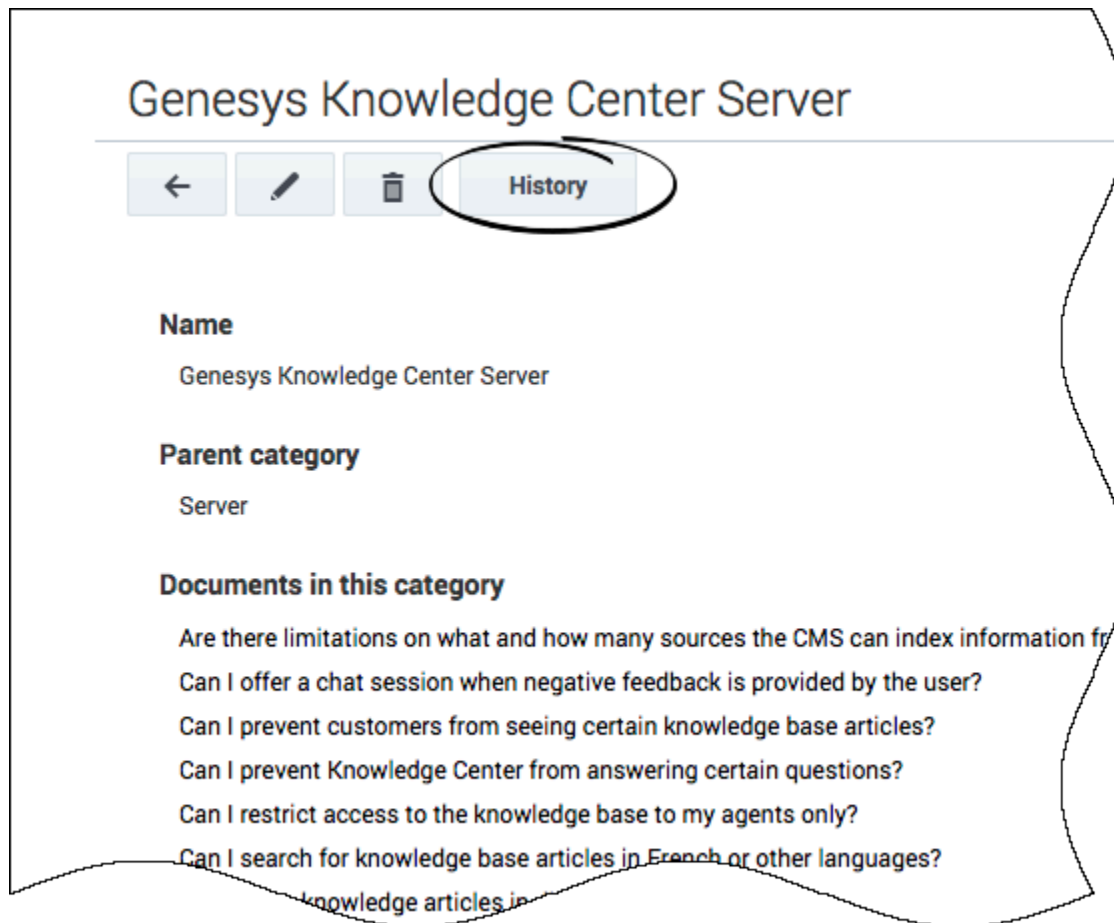
The category will look something like this:



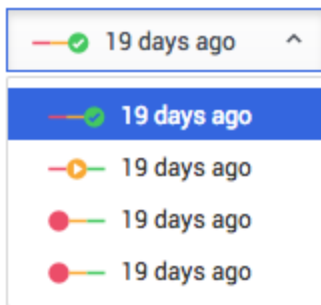
In addition to its properties, you can see a list of the documents that belong to the category. Click a document's name to open it.

Category history

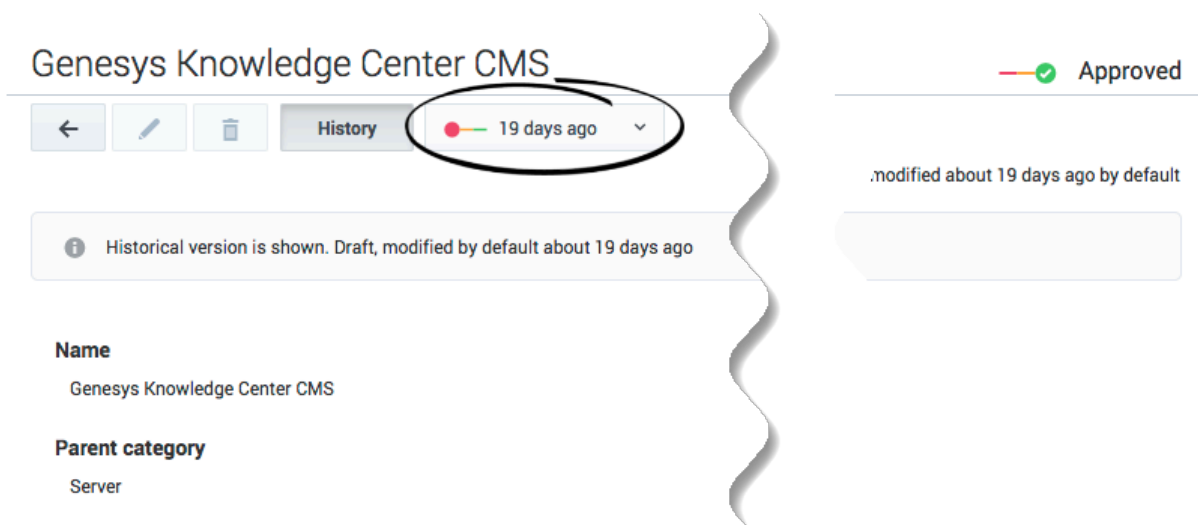
While you are viewing a category, you can click the **History** button:



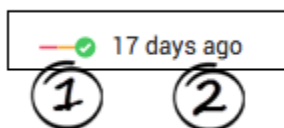
This displays all of the versions of the category:



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:



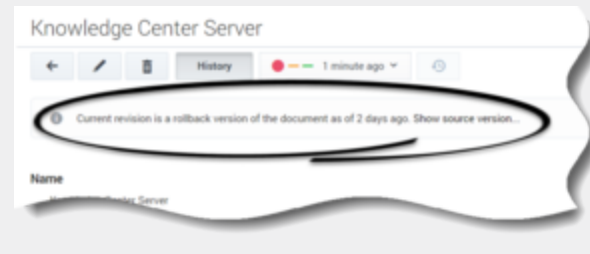
- **Approval status (1)**
- **How many days ago the version was created (2)**

Category version rollback

Important

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

	<p>From the category view click the History button.</p>
	<p>The Rollback button is displayed immediately to the right of the history drop-down menu.</p>
	<p>Select a historical version from the history drop-down menu.</p>
	<p>The Rollback button is enabled after a historical version of the category is selected. Click the Rollback button.</p>

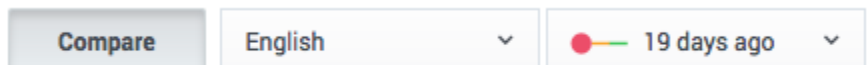


The screenshot shows the 'Knowledge Center Server' interface. A notification bubble is displayed, stating: 'Current revision is a rollback version of the document as of 2 days ago. Show source version...'. The notification is circled in black. Below the notification, the 'Name' field is visible with the text 'Knowledge Center Server'.

The new historical version of the category is created, which is a copy of the source version. A notification is displayed which indicates that the current version of the category is a rollback version and provides a link to the source version of the current category's revision.

Comparing category versions

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



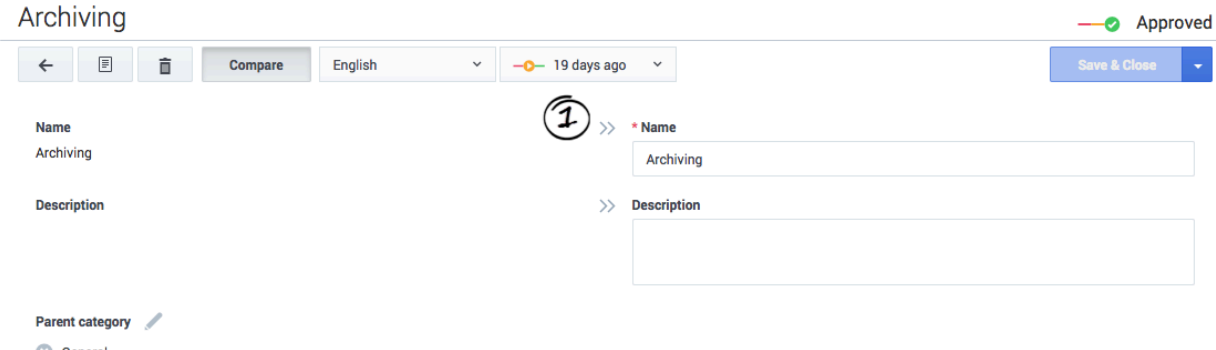
The image shows a 'Compare' button followed by two dropdown menus. The first dropdown is set to 'English'. The second dropdown shows a timeline with a red dot at '19 days ago'.

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 category from one language to another

Compare mode displays the older version and the current version side by side:



The screenshot shows the 'Archiving' category comparison interface. The top bar includes a 'Compare' button, a language dropdown set to 'English', and a version dropdown set to '19 days ago'. A 'Save & Close' button is on the right. The main content area is split into two columns. The left column shows the 'Name' field with the value 'Archiving' and the 'Description' field. The right column shows the 'Name' field with the value 'Archiving' and the 'Description' field. A circled '1' is next to the 'Name' field in the right column. The 'Parent category' is set to 'General'.

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