Genesys Knowledge Center User's Guide

Working with Categories

12/19/2025

Contents

Working with Categories

Displaying categories

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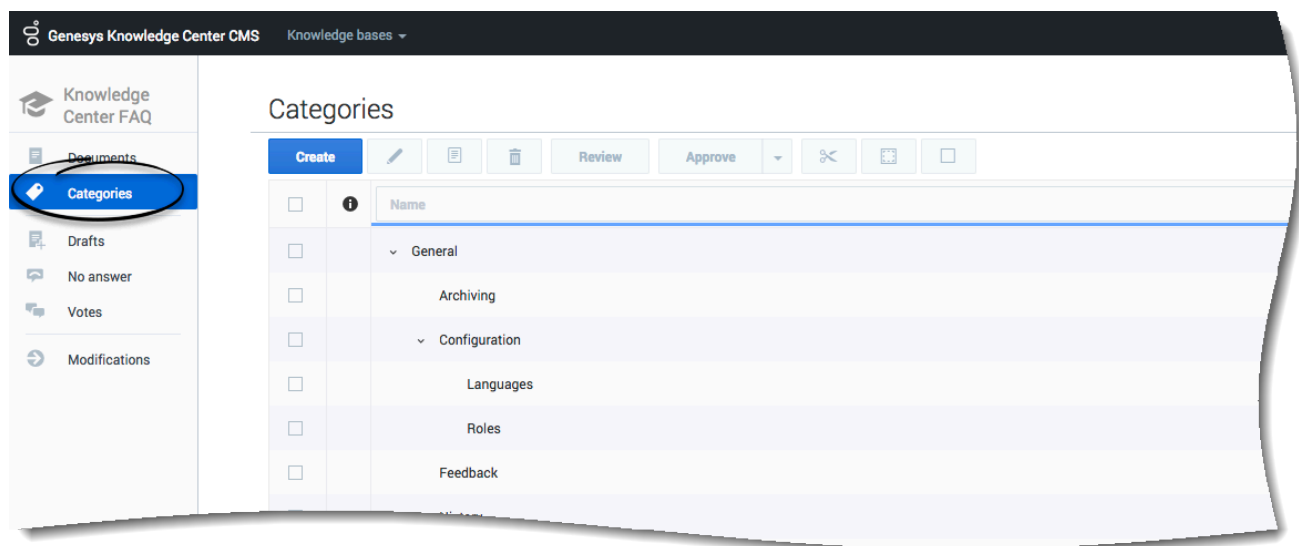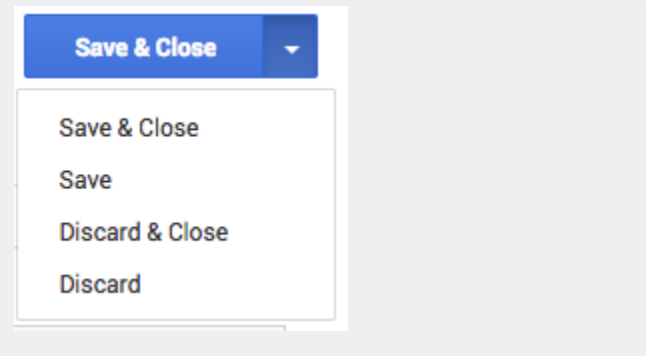

Creating a category

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

	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.

|	
	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
	Click **Save & Close** or select one of the other options in the Save & Close button's drop-down menu.

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.
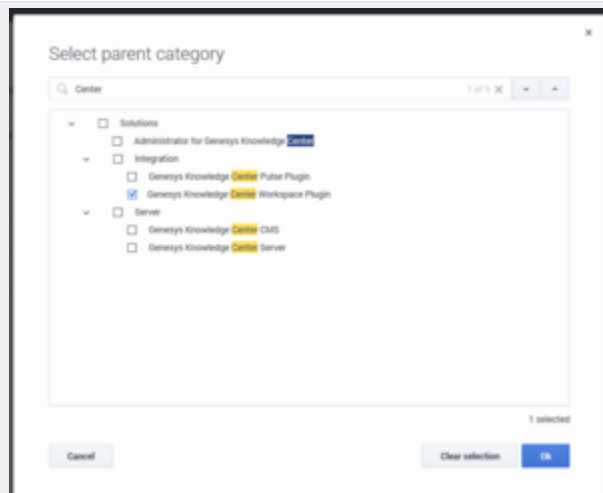- Delete a child category.
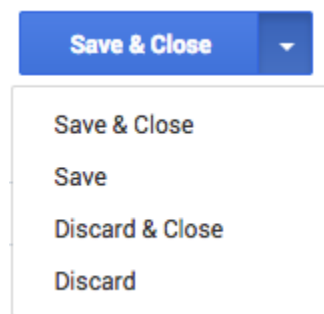
Create a parent category
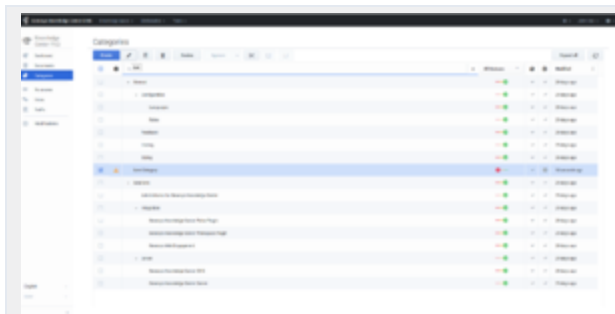
Create a new category or select an existing category to edit.
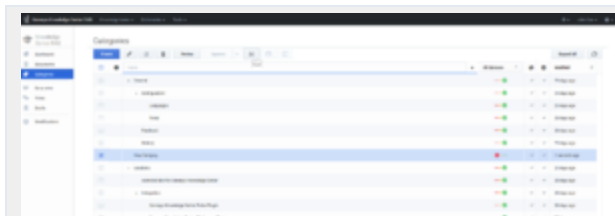

Click **Edit** > **Parent category**.

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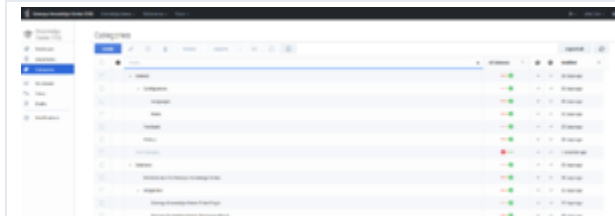

Click **Save & Close** or select a different option from the Save & Close drop-down menu.
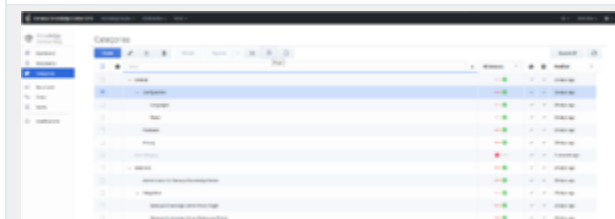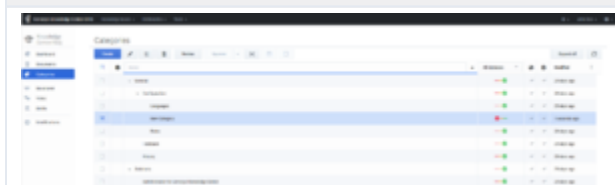
Move a category

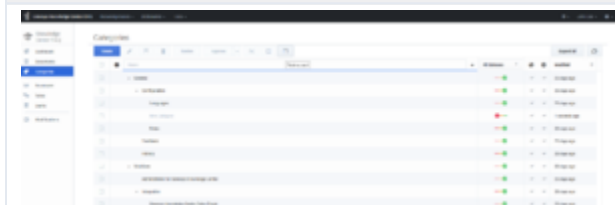|	
	Select a category.
	Click the **Cut** button. The selected category will be grayed out.
	Select the parent category and click **Paste**.
	The selected category will be pasted as a child category under its new parent category. If the category that was moved includes child categories, the child categories will also be moved.

Convert a category from child to root

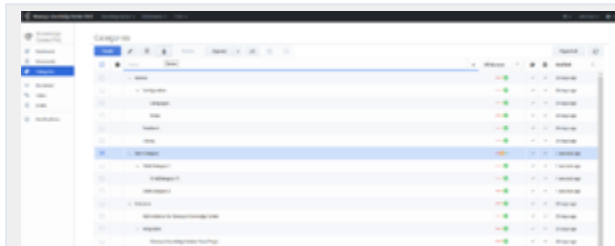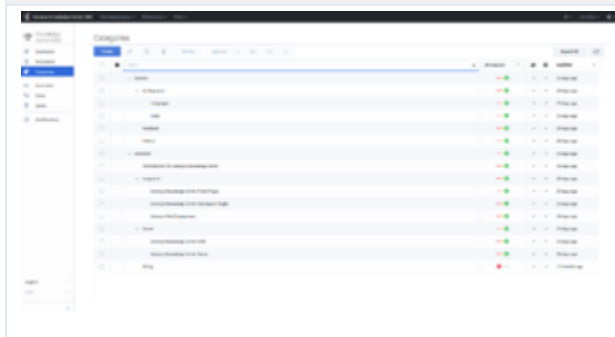|	
	Select category and click the **Cut** button. The selected category will be grayed out.
	Click **Paste as root**.

The selected category will now be at the root level. If the converted category includes child categorie/ 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.
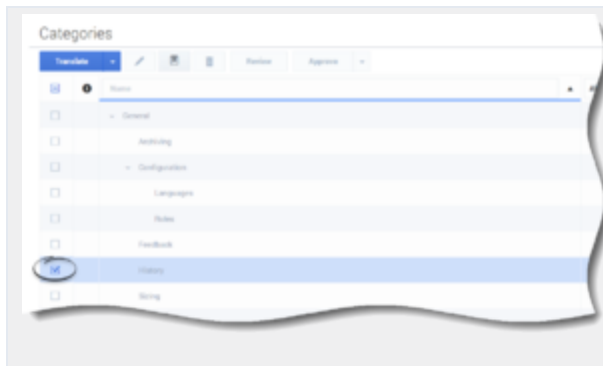
Translating categories
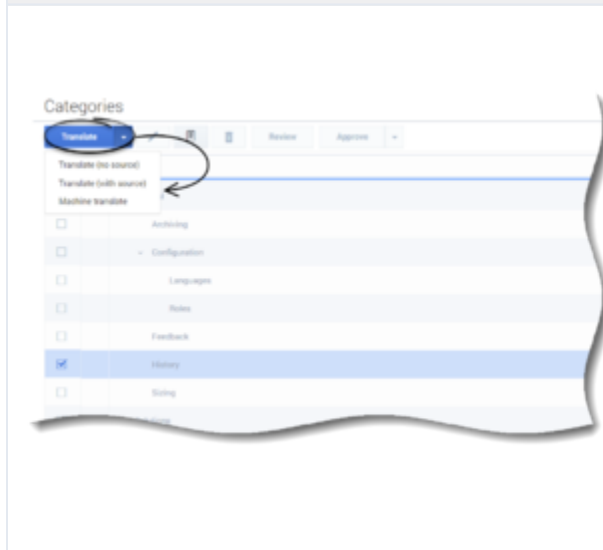
For a quick reference on how to:

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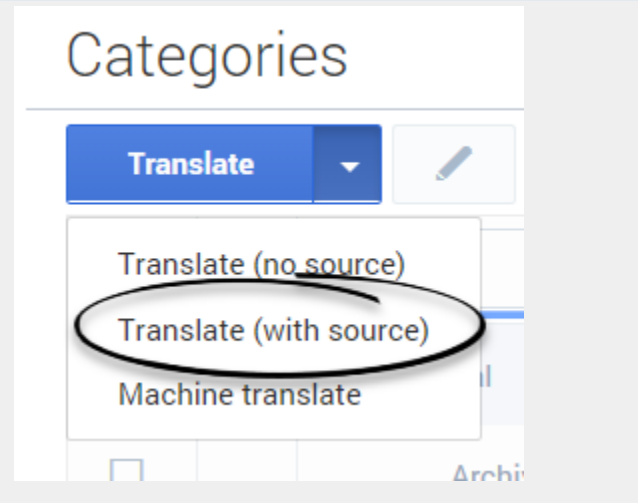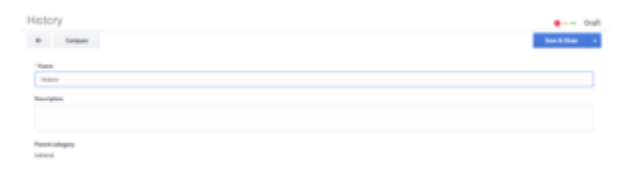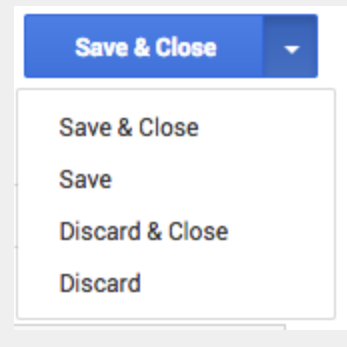
Translate (no source)
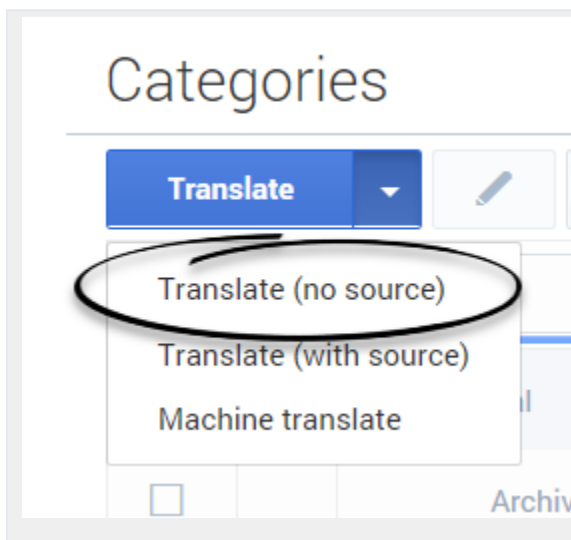
Click the arrow next to the **Translate** button in the toolbar and choose **Translate (no source)** from the menu.

	Enter values for the mandatory fields (marked by the red star), as well as any other fields you have data for.
	Click **Save & Close** or select one of the other options in the **Save & Close** menu.

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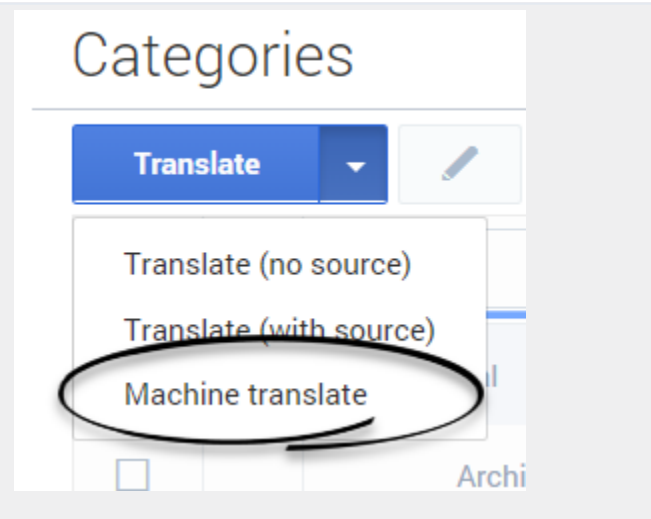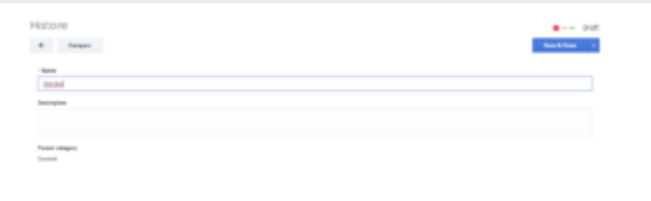
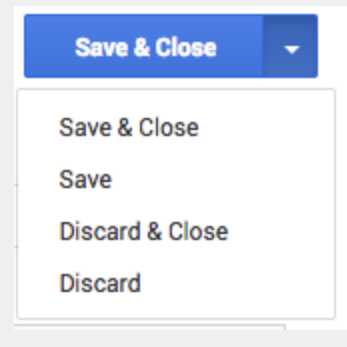|	Click the arrow next to the **Translate** button in the toolbar and choose **Translate (with source)** from the menu.
	Manually translate the document fields using the source document content.

Click **Save & Close** or select one of the other options in the **Save & Close** menu.
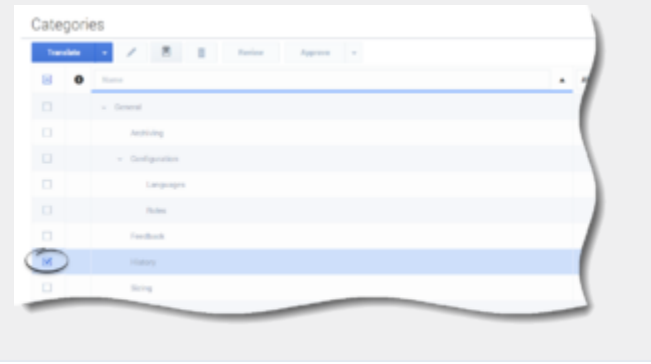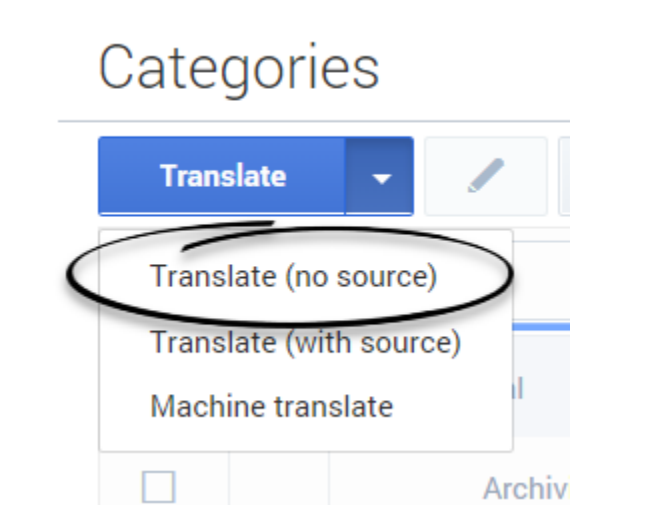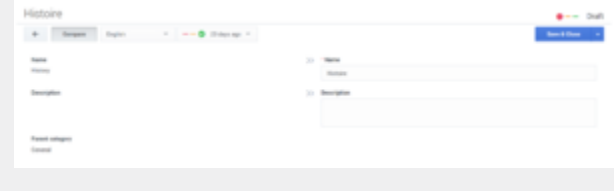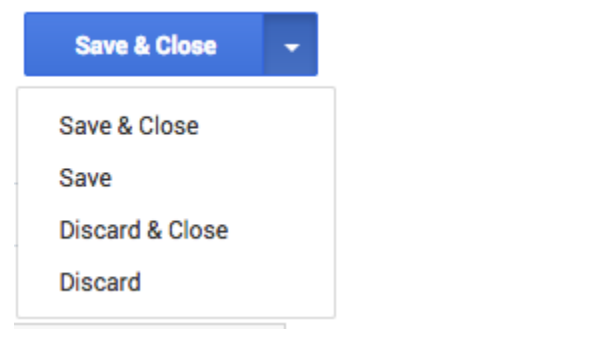
Machine translate

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

Click the arrow next to the **Translate** button in the toolbar and choose **Machine translate** from the menu.

Make edits to the translated version of the document, if necessary.

Click **Save & Close** or select one of the other options in the **Save & Close** menu.

Translating a category in compare mode

Select a category to translate to the current language.

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

|	
	Click the **Compare** button from the Category translation view.
	Click **Machine translate** or **Translate (with source)** from the menu.
	Make edits to the translated fields, if necessary. If you clicked **Translate (with source)**, you must translate the content in the fields manually.
	Click **Save & Close** or select one of the other options in the **Save & Close** menu.

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
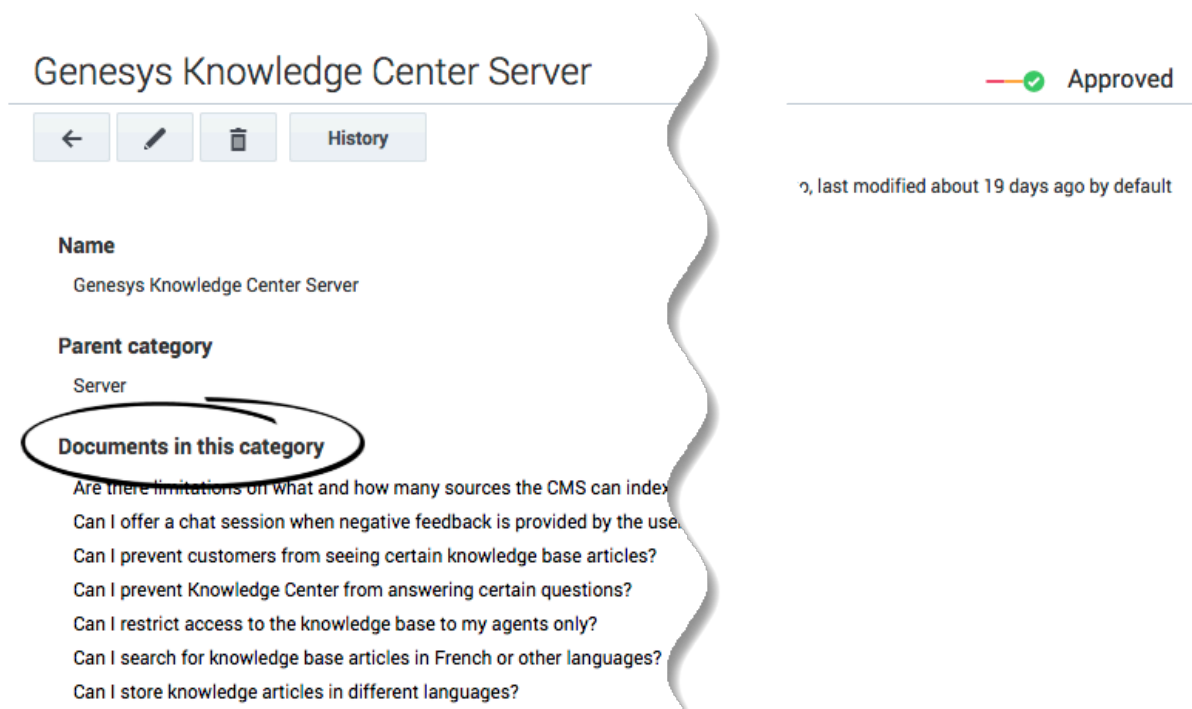- Adding an error message below them

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**:
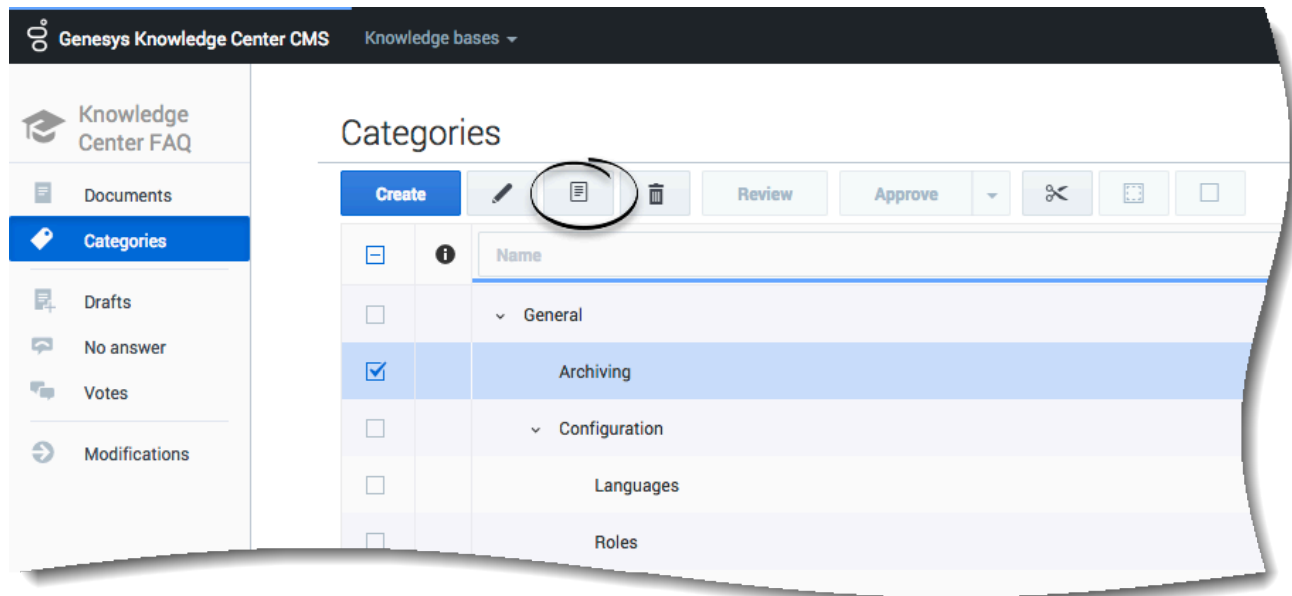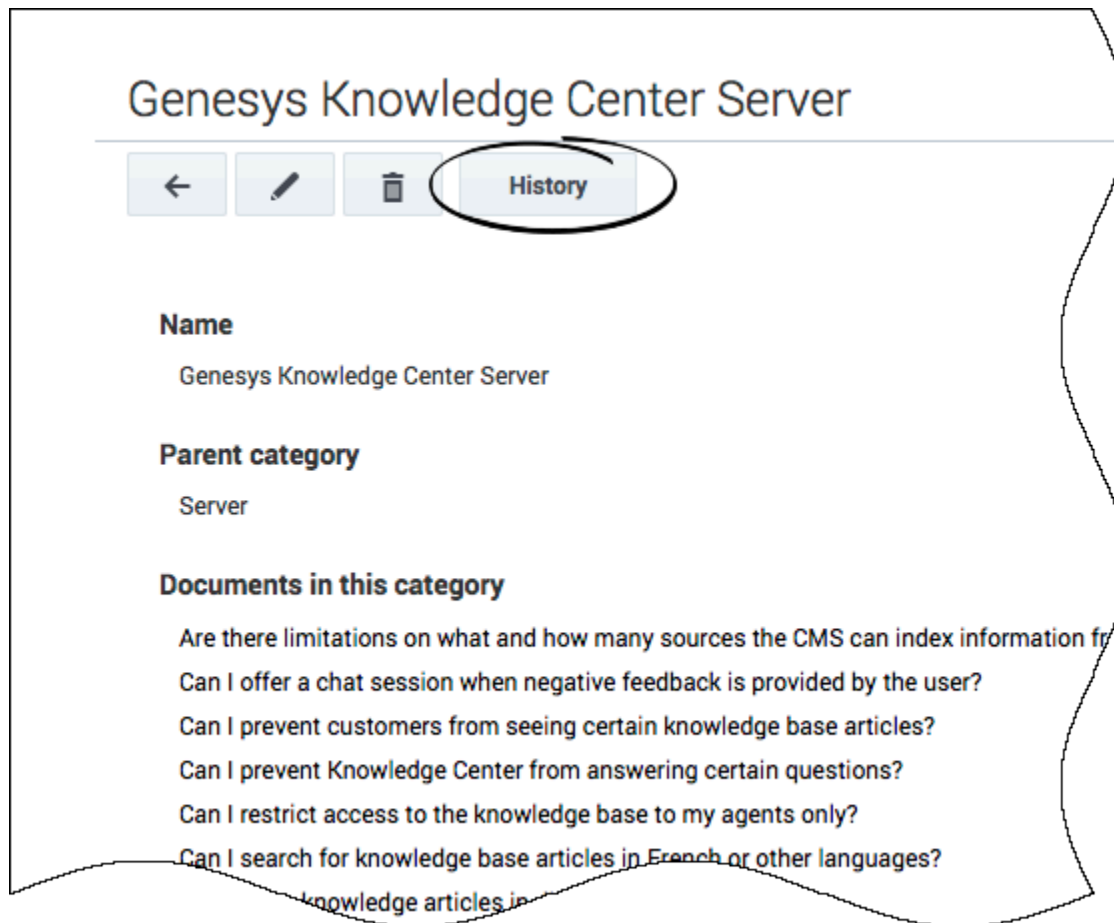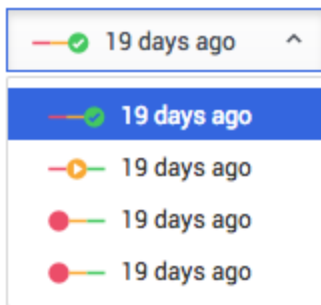

The category will look something like this:

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.
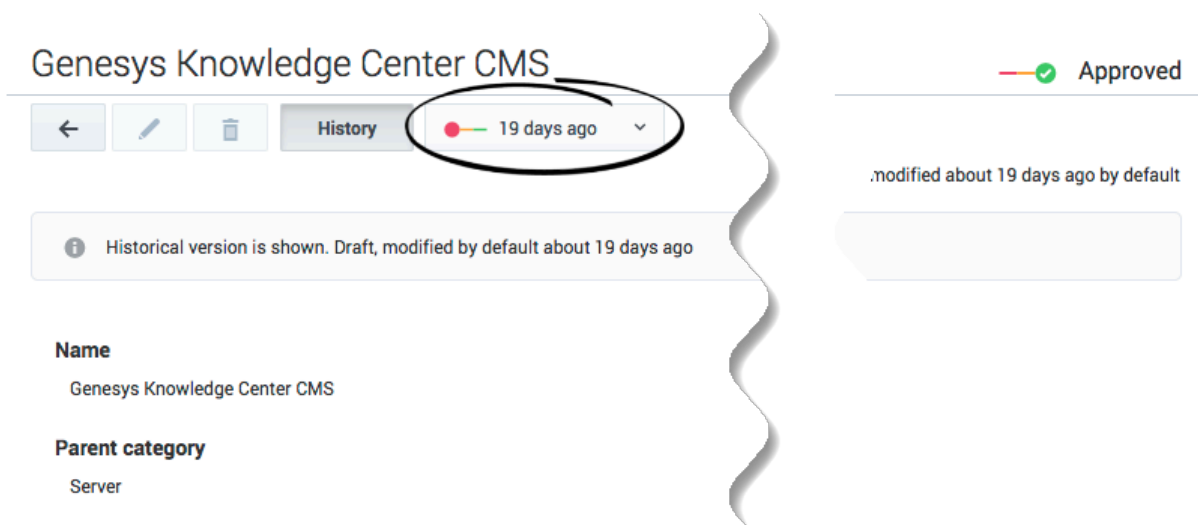
Category history

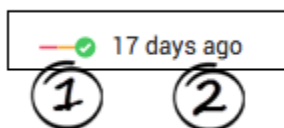While you are viewing a category, you can click the **History** button:

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:

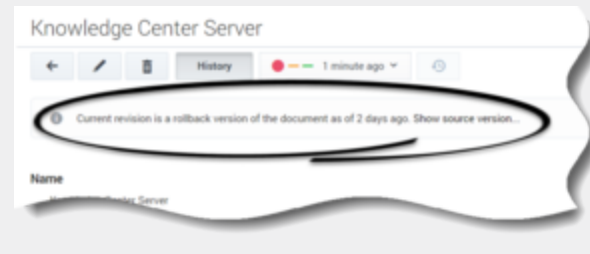Each line in the history drop-down shows the following information about the version:

- 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.

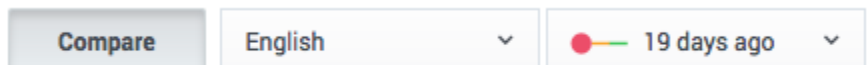|	
	From the category view click the **History** button.
	The **Rollback** button is displayed immediately to the right of the history drop-down menu.
	Select a historical version from the history drop-down menu.
	The **Rollback** button is enabled after a historical version of the category is selected.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

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**:
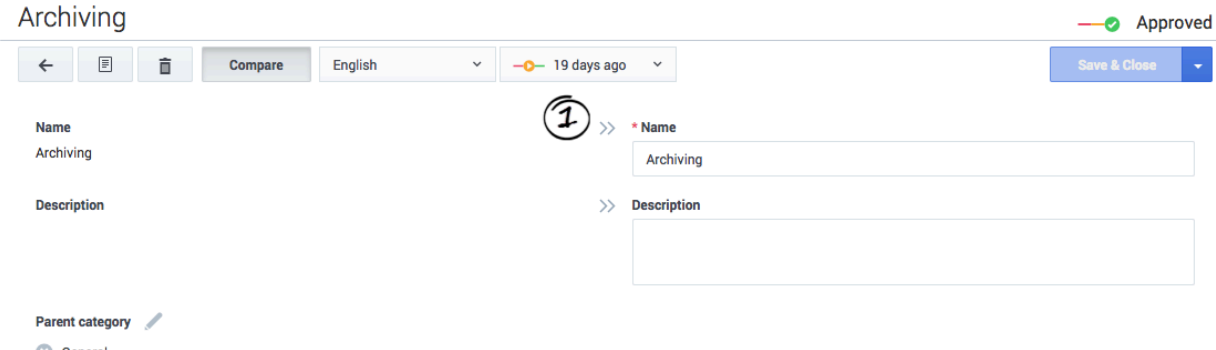

Select the desired language and version from the drop-down lists that appear.

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:

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