# Genesys Knowledge Center User's Guide

Working with Content

12/15/2025

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# Working with Content

## Overview

You can use the authoring area to perform the following functions on the content stored in the CMS:

- Create or edit documents
- Create or edit categories
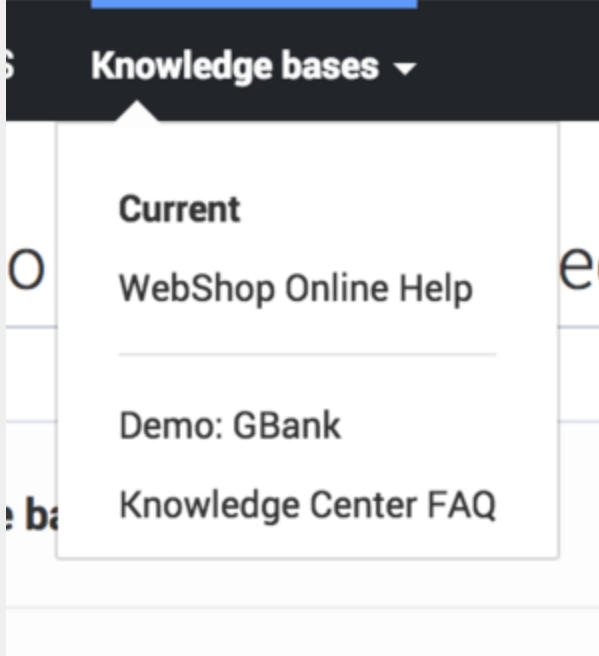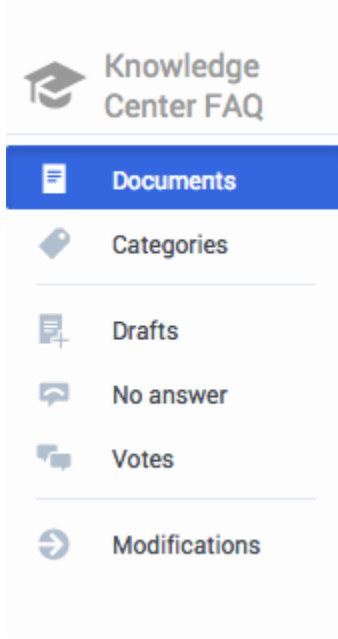- Check synchronization status

> ### Important
> To access this functionality you must have one of these CMS Authoring privileges:
>
> - Knowledge.CMS.Category.Author
> - Knowledge.CMS.Document.Author
>
> For more information, see Access Permissions.
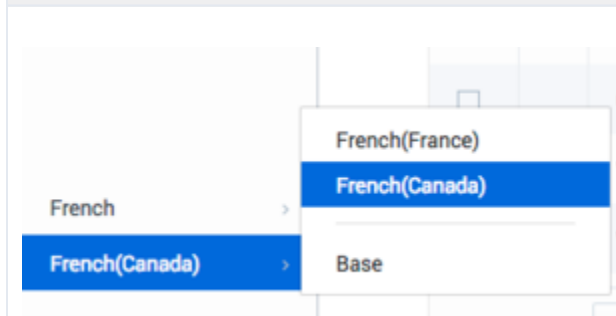
## The authoring area

To open the authoring area, click the **Knowledge bases** menu in the main menu of the application.

This displays the current knowledge base (just below the **Current** label) as well as a list of all available knowledge bases (below the separation line). Clicking one of the listed knowledge bases displays the document authoring view for that knowledge base.

Use the sidebar menu on the left to access these types of knowledge base content:

- Authoring
    - Documents—the documents in the knowledge base
    - Categories—knowledge base categories
- Feedback
    - Drafts—draft documents submitted by agents (using Workspace)
    - No answer—queries for which no relevant results were found
    - Votes—relevancy and 5-star ratings submitted by agents and consumers
- Synchronization status
    - Modifications—a list of the knowledge base modifications that are waiting to be synchronized

# Selecting a language
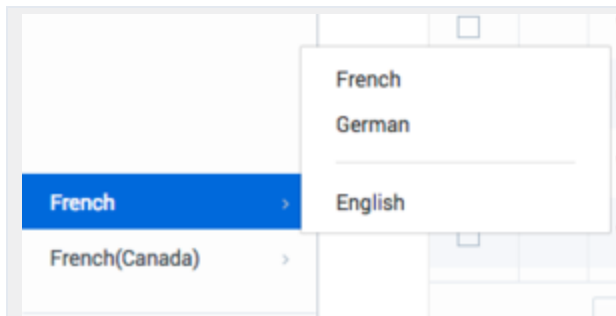
| | |
|---|---|
|  | Select the language you want to use from the list at the bottom of the sidebar.<br><br>**Note:** The language that appears below the separator line is the default language for the knowledge base. Select this language to create a new document or category. Selecting any other language allows you to translate an existing document or category into the selected language. |
|  | For multi-regional languages, you can select the specific region you want to work with.<br><br>**Note:**<br><br>• Selecting the base language allows you to define content that will be re-used in all regional versions<br><br>• You must create a new document or category in the base language before you create a regional version. |

# Approval workflow

Documents and categories share the same approval workflow. Two approval flow types are supported and can be configured per Knowledge Base:

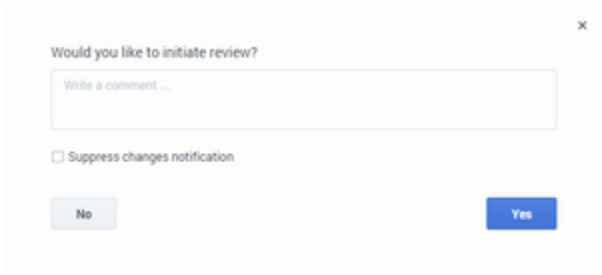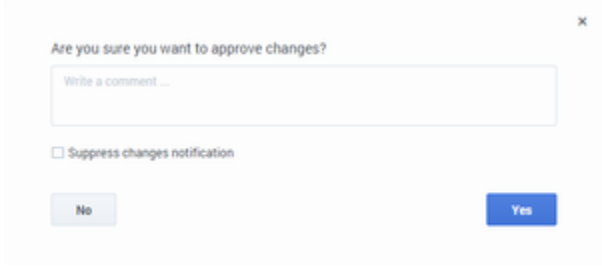- Standard
- Simple (from version 9.0.003)

## Standard Approval flow
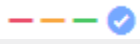
This approval flow consists of 4 states:

| | |
|---|---|
|  | **Draft**—authoring is in progress. |
|  | **In Review**—the category or document is ready for approval review. |

| | |
|---|---|
|  | **Approved**—the category or document is ready to be published to the server so it can be used by Knowledge Center. |
|  | **Rejected**—the category or document has been reviewed and rejected—it requires further editing before it can be resubmitted for review. |
|  | **Published**—the document has been published. Not related to approval flow. |

Let's look at an example of this workflow:

| | |
|---|---|
|  | When you create a new category or document, it has a status of **Draft**.<br><br>You can edit and save it multiple times while it is still in **Draft** status. |
|  | Once you have reached the final version and are ready to send your document or category for review, click the Review button. The category or document is now in **In Review** status. You can also submit comments to the reviewer to explain the changes that you made and why they should be approved. When reviewing the document you can "suppress changes notification" in the Workspace by selecting its checkbox. By default notifications are not suppressed. When reviewing in bulk, the checkbox is unavailable.<br><br>**Note:** The comments you enter here are only visible in the document history. They are not exported into the Genesys Knowledge Center Server and are not visible to agents and customers using the knowledge. |
|  | Once the category or document has been approved it has a status of **In Review**. |
|  | When a category or document has a status of **In Review**, you can approve the changes by clicking **Approve** , or reject the changes by clicking **Reject**. You can also provide your comments, which can be seen in the **History** view for the category or document.<br><br>When approving the document you can change the "suppress changes notification" status or keep the same one that was exposed during the review. When approving in bulk the checkbox is unavailable.<br><br>**Note:** If you change the contents of the category or document and then save it, it will change to a status of **Draft**, which means the approval workflow must be restarted. |
|  | Once the category or document has been approved by the reviewers, it has a status of **Approved**. It can now be published to the Knowledge Center Server for use by agents and customers. |

| | |
|---|---|
| | **Note:** If you change the contents of the category or document and then save it, it will receive a status of **Draft**, which means the approval workflow will be restarted. Agents and customers can still use the latest approved version of the category or document while the newer version is being evaluated. |
| ⊗— Rejected | Rejected categories or documents have a status of **Rejected**. They must to be corrected and then resent for review and approval. |
| – – ✓ Published | Not related to approval flow. Indicates that document is published. This status is absent for categories. |

This state diagram gives an overview of the entire process:
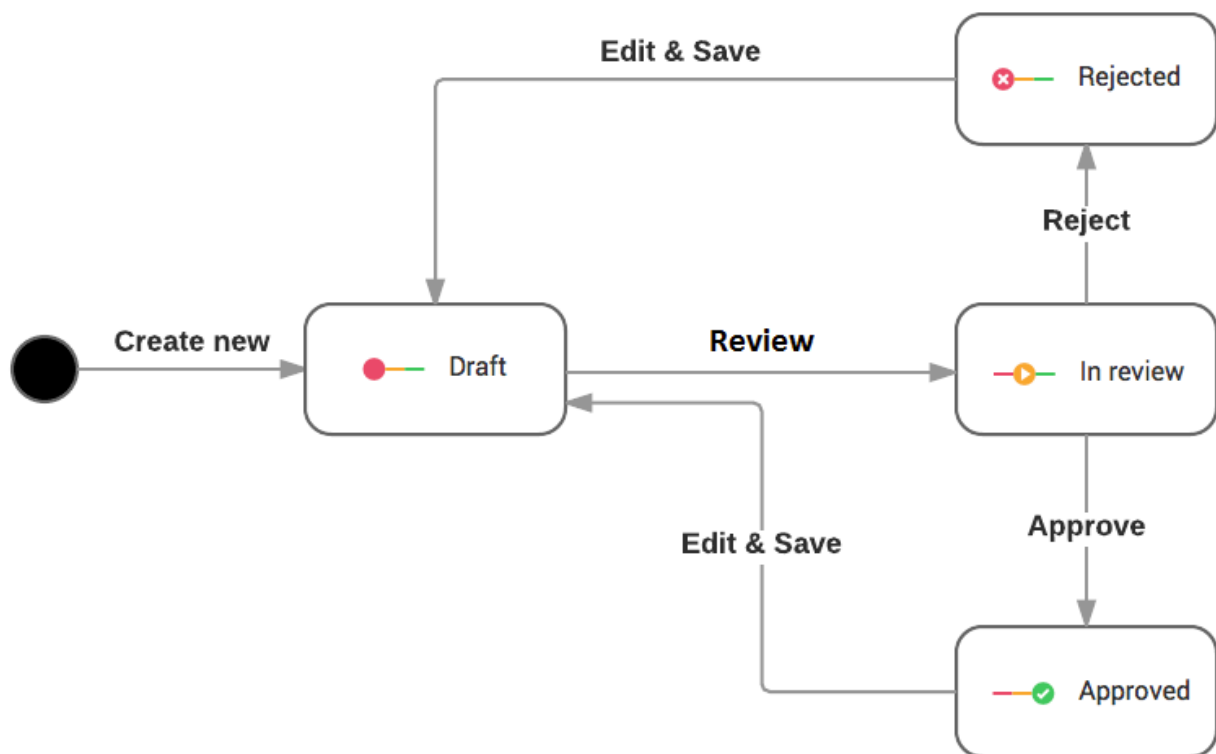


You can change the status of individual documents or categories, as described above, or as a bulk operation:

- Select the desired categories or documents from the list.

- Click the desired status (**Review**, **Approve**, or **Reject**) in the toolbar.

- The operation you have chosen will only be applied to any of the selected documents that are in the appropriate state. For example, if you select **Review**, it will only be applied to the documents that are have a status of **Draft** or **Rejected**.

- Publishing applied to all Approved documents in knowledge base

## Simple Approval flow

This is a simplified standard approval flow which consists only of 2 states: Draft and Approved. After approving documents, these also become Published as in the Standard workflow.

The following state diagram gives an overview of the entire process for Simple workflow: