

Genesys Knowledge Center Deployment Guide

Knowledge Center 8.5.0

2/23/2015

Table of Contents

Deployment Guide	3
New in this Release	4
The GKC Components	7
Prerequisites	13
Installing the GKC Cluster Application	15
Installing GKC Server	19
Installing the GKC CMS	43
Installing and Using the Administrator Plugin	56
Installing the Pulse Plugin	70
Installing the Workspace Desktop Edition Plugin	76
Importing Data Into the Knowledge Base	85
Sizing	87

Deployment Guide

Important

6

Genesys Knowledge Center is now available as a restricted offering. You must contact your Genesys representative to see if Genesys Knowledge Center is suitable for your environment and business needs. The documentation here anticipates a larger rollout of Genesys Knowledge Center in late 2015.

New in this Release

This is the first release of Genesys Knowledge Server. Here are the latest and greatest features:

- Indexing and Federated Search
 - Index knowledge from a variety of data sources and expose them via a single search interface
 - Search for knowledge using simple natural language-like sentences
 - Search content quickly with an auto-complete feature that provides suggestions as you type your search phrase
 - Collects user feedback in order to promote or demote a given knowledge article's relevance for future searches

Agent Empowerment

- Exposes knowledge seamlessly via a plugin to Workspace Desktop Edition, the app where agents spend most of their time interacting with customers
- Gives agents customer search history so that they know what the customers have searched, reviewed, and ignored online before they escalated to human-assisted service
- Allows agents to search knowledge bases for any content that may not have been exposed to public websites and filter the results based on context and metadata to find the right answer quickly
- Transfer the resulting knowledge to the interaction response with a single click
- Leverage your agent's subject matter expertise and allow them to contribute content to the knowledge base—administrators can review the content before publishing it for customer consumption

APIs and Integrations

- Genesys Knowledge Center comes with a rich set of APIs for:
 - Session Management
 - Knowledge Base Operations
 - FAQ Retrieval
 - Feedback Management
 - Reporting
- Proactively offer Chat or Callback or Call Us (phone number) with the help of Genesys Proactive Engagement, when there is negative feedback or no answer was found
- Easily customizable widgets that can be exposed to the external website and intranet sites are available out-of-the-box
- Content Management

- Configure knowledge base structure, custom tags, visibility, and other properties
- · Create content with or without rich media attachments
- Predefined approval workflow allows administrators to approve content before publishing
- Administration, Deployment, and Management
 - Role-based access for Agents, Administrators, Content Managers and Reporting Users
 - Simple and easy-to-use user interfaces for configuration
- Supported Platforms
 - GKC Server and GKC CMS support the following operating systems:
 - Linux 6 64-bit
 - Linux 7 64-bit
 - Windows Server 2008 x64 (64-bit)
 - Windows Server 2012 x64 (64-bit)
 - The GKC plugin for Genesys Administrator supports the following operating systems:
 - Linux 5 64-bit
 - Linux 6 64-bit
 - Windows Server 2008 x64 (64-bit)
 - Windows Server 2012 x64 (64-bit)
 - The GKC plugin for Pulse supports the following operating systems:
 - Linux 5 64-bit
 - Linux 6 64-bit
 - Windows Server 2008 64-bit
 - Windows Server 2008 x64 (64-bit)
 - Windows Server 2012 x64 (64-bit)
 - The GKC plugin for Workspace Desktop Edition supports the following operating systems:
 - Windows Vista x86 (32-bit)
 - Windows 7 x86 (32-bit)
 - Windows 8 x86 (32-bit)
 - Windows Server 2008 x86 (32-bit)
 - Windows Server 2012 x86 (32-bit)
 - Windows Vista x64 (64-bit)
 - Windows 7 x64 (64-bit)
 - Windows 8 x64 (64-bit)
 - Windows Server 2008 x64 (64-bit)
 - Windows Server 2012 x64 (64-bit)
 - Java 7
 - Supported Browsers
 - Firefox

- Chrome
- Internet Explorer
- Safari

The GKC Components

Before you start working with Genesys Knowledge Center, you might find it helpful to learn about its components:

- **GKC Server**—Combines indexing and natural language–based search capabilities to provide effective knowledge article retrieval from one or more knowledge bases.
- **GKC CMS**—Provides customers who do not have an existing Content Management System (CMS) with the ability to create and update their knowledge bases and push them to the Genesys Knowledge Center Server for indexing and search. This component also allows customers to import and edit knowledge articles from a file.
- **GKC Plugin for Administrator**—Enables system administrators to use Genesys Administrator to configure their knowledge clusters.
- **GKC Plugin for Pulse**—Allows contact center managers to view Genesys Knowledge Center reporting at near real-time from the Pulse user interface.
- GKC Plugin for Workspace Desktop Edition—Provides agents with access to knowledge events (searches, article views and feedback) related to the current customer and also allows them to search the knowledge base right from their desktop.
- GKC Data Import Tool—Use this tool to import XML-based QNA data into a GKC index.
- GKC REST API—Can be used for both client and management functions.
- Genesys Web Engagement Integration—GKC can be used with GWE to provide proactive engagement capabilities.

GKC Server

The Genesys Knowledge Center Server combines indexing and search capabilities that allow for effective FAQ retrieval over one or more knowledge bases. It is web-based, and can run under the Jetty HTTP Server.

At its core GKC Server consists of two key parts:

- The Elasticsearch search and analytics engine
- Several Elasticsearch plugins

Elasticsearch is a search server based on Lucene. It provides a distributed, multitenant–capable full-text search engine with a RESTful web interface and schema-free JSON documents. ElasticSearch is distributed, which means that indices can be divided into shards and each shard can have zero or more replicas. Each node hosts one or more shards, and acts as a coordinator to delegate operations to the correct shards.

Other Features of the GKC Server

- GKC Server exposes a REST API that can be used for both client and management functions.
- GKC Server is a cluster application, meaning that several nodes or servers can be grouped within a single cluster.
- GKC Server requires two application objects in Genesys Administrator:
 - One to describe the server itself (type = Genesys Generic Server)
 - Another for storing high-level options and knowledge base configurations, and for integrating the GKC server with other applications (type = Application Cluster)
- You can use third-party load-balancers above the cluster to organize your servers into a single pool, thereby providing a single point of entry for your users.
- GKC Server uses Genesys Roles to restrict access, and to authorize and authenticate users.
- The GKC installation package includes a launcher that can launch both Jetty and all of the applications deployed on JEtty as a standalone Genesys application. To accomplish this goal, the launcher communicates with the Genesys Config Server to fetch the required options.

GKC CMS

The GKC Content Management System (CMS) serves several purposes:

- · Creates, activates, and deactivates knowledge bases
- · Creates, updates, and deletes questions and answers in a knowledge base
- Assigns categories to this content
- · Imports historical information from the GKC Server

The CMS primarily interacts with the GKC Server when creating or updating index data.

Plugin for Administrator

This plugin lets you manage the structure of the knowledge bases that are controlled by the GKC Server Cluster application object in Genesys Administrator.

After you install this plugin, you will have access to a separate page in Administrator that displays a user interface for creating new knowledge bases and for editing the descriptions, options, languages, and custom fields in existing knowledge bases.

Plugin for Pulse

The GKC Plugin for Pulse displays GKC Server statistics, such as KPIs, user activity, trending topics, like and dislike trends, types of activities, and more.

Here is a sample display of key performance indicators:

System	÷	Knowledge Center	÷	+	
nowledge Center					
groupon					
Search					378
Feedbacks					19.05%
Deflection					32.01%
Average Confider	ce				0.86
Sentiment					83.33%

This image shows a sample dashboard containing analytic reports:

DAILY TREE	ND			÷	EVENT	OVER TI	ME																							
	0%	,				Q, Zoom (but																							
	-07	0			100 75																								- M	
					50 25																							٨	N	
					0																						N		M I	
							00:00		00:00 09-08		00:00		00:00			1:00 1-01		:15 -08		00:30 10-16		00:45 10-24		00.00		00:00 11-08		00:00 11-16		11-
000010	00:00	00:00	00:00	00:00	00:00 09-08	00:00	00:00	00:00	00:00 09-20	00:00 09-23	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00.00	23.00 10-28	23.00 10-31	23:00 11-03	23:00 11-05			23.00 21	00 23.0	
							+ :	SATISFAC	TION						+	LANGUAG	E						+	KNOWLE	DGE BAS	F				
EVENT'S	00-27	08-30	09-02	09-00	09-00					09-23	09-20	00-20	10-02	10-05				10-17	10-20	10-23	10-20	10-28					11-12	11+12 1	-10 11-	

Plugin for WDE

Your agents can use the GKC Plugin for Workspace Desktop Edition (WDE) to access GKC data from from their WDE worksession.

For example, if a customer escalates a question using a chat widget and the resulting interaction is routed to an agent, GKC can pre-populate a search based on the data that is attached to the chat interaction. When the interaction reaches the agent, he or she will see the customer's search history, so the customers needs can be met more quickly. In cases where the customer doesn't authorize automatic search-based access, the agent will also be able to search the customer's session history if the customer allows this during their chat.

The following images show a QNA search and customer history, respectively.

🛞 🚺 John Smith 🕐 00.00:13 🐺 🛒		_			1
ase Information	^	0	Search Histor		
Drigin: Inbound chat		CON	Knowledge base		
 John Smith O Connected 		CONTACT	groupon	*	 Categories
5:04:06 PM] New party 'John Smith' has joined the ession 5:04:16 PM] New party 'gks_super' has joined the			Do I need to pay	a tips in the restaurant? * Search No answer	Ticketed events Booking trips Using a Groupon Buying Gifts
ession			Do I need to call	to confirm the restaurant reservation I made using Groupon Reserve?	Booking trips Ticketed events
		×	Do I need to call	to confirm the restaurant reservation I made using Groupon Reserve?	Using a Groupon
		NOM	Do I need to call	to confirm the restaurant reservation I made using Groupon Reserve?	Restaurant reservations Buying
		KNOWLEDGE CENTER		3 10 Max	 Basic filters
	Send	ENT			 Custom fields filters
	Sena	5			
Note		RESPONSES			
	Save				



Data Import Tool

You can use the data import tool to import QNA data from an XML file into a GKC index . The data in your XML file must be stored in a specific format, as shown in the following simple example:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<documents kbsId="gkc" lang="en">
    <document>
        <id>gkc 1</id>
        <question>What is Genesys Knowledge Center
Server?</question>
        <answer>Genesys Knowledge Center Server combines indexing
and search capabilities that
                allow for effective FAQ retrieval over one or more
knowledge bases.</answer>
        <categories>
            <category>
                <id>1</id>
                <name>Common article</name>
            </category>
        </categories>
    </document>
</documents>
```

GKC REST API

The Genesys Knowledge Center (GKC) REST API exposes three sets of functionality:

- The Knowledge API can be used by Knowledge Center Server clients who are interested in retrieving FAQ-related information from a knowledge base, including things like the structure of the knowledge base and its feedback data
- The Management API allows service components—such as content management systems, the GKC Administrator plugin, and data importers—to create, populate, and manage knowledge basess
- The Reporting API provides reporting engines—such as Easy Pulse or third-party products—with data on the various knowledge-related activities carried out by agents and customers

Genesys Web Engagement Integration

While it isn't exactly a component, we thought this would be a good place to mention that you can integrate GKC with Genesys Web Engagement. GWE helps you monitor, identify, and proactively engage web visitors in conversations that match your business objectives. And GKC can be used with GWE to provide proactive engagement capabilities.

For more information, see how to integrate GKC with Genesys Web Engagement.

Prerequisites

Prerequisites

OS Requirements

Knowledge Center Server

- OS Red Hat Enterprise Linux AS 5 (Intel 32-bit)
- OS Red Hat Enterprise Linux AS 5-7 (Intel EM64T)
- OS Windows Server 2008 (Intel EM64T)
- OS Windows Server 2012

Knowledge CMS

- OS Red Hat Enterprise Linux AS 5 (Intel 32-bit)
- OS Red Hat Enterprise Linux AS 5-7 (Intel EM64T)
- OS Windows Server 2008 (Intel EM64T)
- OS Windows Server 2012 (Intel EM64T)

Genesys Knowledge Center Plugin for Workspace Desktop Edition

- OS Windows Vista (Intel 32-bit)
- OS Windows Server 2008 (Intel 32-bit, Intel EM64T)
- OS Windows 7 (Intel 32-bit, Intel EM64T)
- OS Windows Server 2012 (Intel EM64T)
- OS Windows 8 (Intel EM64T)

Genesys Knowledge Center Plugin for Administrator

- OS Red Hat Enterprise Linux AS 5 (Intel EM64T)
- OS Windows Server 2008 (Intel EM64T)
- OS Windows Server 2012 (Intel EM64T)

Genesys Knowledge Center Plugin for Pulse

- OS Red Hat Enterprise Linux AS 5 (Intel EM64T)
- OS Windows Server 2008 (Intel 32-bit, Intel EM64T)
- OS Windows Server 2012 (Intel EM64T)

Web Browsers

- Google Chrome 34+
- Mozilla Firefox 24+
- Microsoft Internet Explorer 10+
- Apple Safari 7+

Java Requirements

• Java 7 SE Bundle

Genesys Environment

- Genesys Framework 8.1–8.5
- Configuration Server (8.1.300.21 / 8.5.100.02)
- Genesys Administrator Extension 8.1–8.5
- Workspace Desktop Edition 8.5

Installing the GKC Cluster Application

Carry out the following steps to install and configure the GKC Cluster Application:

- 1. Import the GKC Cluster Application Template
- 2. Create Cluster Applications
- 3. Configure the Cluster Application

Import the GKC Cluster Application Template

- 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_Cluster_850.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.

Seriesys	Genesys A	Administra	for			Tenant: Environment	Q	New Window	Log out 🛛 😳 🔻	1 🕑
MONITORING PROVISIONING	OPERATIONS									
PROVISIONING > Environment > A	Application Templates >	New Application Tem	plate							
Navigation 🔍	T Knowledge_Cent	ter_Cluster_850 - \Aj	plication Templates	\Knowledge \						
😝 Search 🛛 🛨	💢 Cancel 🛃 Save & G	Close 🛃 Save 🛃 Save	& New 📑 Reload	작 Import Metadata						
😝 Environment 📃	Configuration	Options	Permissions	Dependencies						
Alarm Conditions										
🕞 Scripts	* Name:	Knowledge_C	enter_Cluster_850							
Application Templates	* Type:	Application C	luster						*	
Applications	* Version:	8.5.0								
- Hosts	Metadata:									
Solutions	Metadata Descriptio	on:								
Time Zones	Metadata Version:									
Business Units/Sites	State:	Enabled								
Tenants										
Table Access Points										
🕞 Formats										
Fields										

New Application Template Panel

5. Click Save and Close.

Create Cluster Applications

- 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 Cluster application template that you imported earlier. Click **OK**.

Browsention			Tenani. En iron	×
 Instructions: Choose object: 	s from the list below.			
				_
Application Templates				
🖻 🔻 📄 New 🍐 New Folder				#
Name 🔺	Туре	Version	State	
Tilter	Filter	Filter	Filter	
View: Root > Application Te				
Knowledge_Center_Cluster_850	Application Cluster	8.5.0	Enabled	
4 4 Page 1 of 1 ▶ ▶ 6	<u>ም</u>		Displaying objects 1 - 1 of	1
			OK Cancel	

Selecting GKC Cluster Application 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_Cluster_850.xml* file. Click **Open**.
- 6. The metadata file is added to the **Select Metadata** file panel. Click **Next**.
- 7. In Specify Application parameters:
 - 1. Enter a name for your application. For instance, *Knowledge Center Cluster*.
 - 2. Enable the **State**.
 - 3. Select the **Host** on which the GKC Cluster load-balancer will reside.
 - 4. Click Create.

Installing the GKC Cluster Application

Create New Application		Tenant: Environment
Steps 《	Instructions: Please	se enter the Application parameters. Mandatory parameters are denoted with an asterisk.
 Select Application Template 	Specify Application para	ameters
🖌 Select Metadata file		
 Specify Application parameters 	* Name:	Knolwdge Center Cluster
Results	* Application Prototype:	Knowledge_Center_Cluster_850
	State:	Enabled
	* Host:	akc-host × P
	* Startup Timeout:	90
	* Shutdown Timeout:	90
	* Redundancy Type:	Not Specified
		Cancel Create Finish

Specifying GKC Cluster Application Parameters

- 8. The **Results** panel opens.
- 9. Enable **Opens the Application details form after clicking 'Finish'** and click **Finish**. The GKC Cluster application form opens and you can start configuring the Cluster application.

Senesys	Genesys A	dministrat	tor				Tenant: Environn	nent 🔎	New Windo	w Log ou	t @• @•
MONITORING PROVISIONING	OPERATIONS										
PROVISIONING > Environment > /	Applications > Knolwdge	e Center Cluster									
Navigation	T Knolwdge Center	Cluster Unknown	- Exited - \Applicatio	ns\Knowledge\							
😹 Search 🛛 🛨	💢 Cancel 🛃 Save & C	llose 🛃 Save 🛃 Save	& New 🛛 😹 Reload 🛛 🔳	Start 📓 Stop 🐻 Grac	eful Stop						
😝 Environment 📃	Configuration	Options	Permissions	Dependencies	Alarms	Logs					
Alarm Conditions									General	Server Info	Network Security
Scripts	General										
Application Templates	* Name:	Knolwdge Cen	nter Cluster								
Applications	* Application Temp	late: Knowledge G	enter Cluster 850							×P	
	* Type:	Application Cl	uster							~	
Solutions	Version:	8.5.0									
📪 Time Zones	Server:	🔽 True									
Business Units/Sites	State:	Enabled									
Tenants	Connections:	📰 Add 🍈 Ed	lit. 🏣 Remove								
Table Access Points		Server 🔺	c	Connection Protocol	Local Timeour		Remote Timeout	Trace Mode			
📪 Formats		No objects to	display								
🕞 Fields											
	Server Info										
		_									
	- 💌 * Network Secu	muy									

Configuring the GKC Cluster Application

Configure the Cluster Application

- If your GKC Cluster application form is not open in Genesys Administrator, navigate to Provisioning > Environment > Applications. Select the application defined for the GKC Cluster and click Edit....
- 2. Expand the Server Info pane.
- 3. If your **Host** is not defined, click the lookup icon to browse to the host on which the GKC Cluster load-balancer will reside.

- 4. In the **Listening Ports** section, create the default port by clicking **Add**. The **Port Info** dialog opens.
 - 1. Enter the port number for the GKC Cluster load-balancer, for instance, 9092.
 - 2. Choose *http* for the **Connection Protocol**.
 - 3. If you will be using a secure connection to the cluster, choose *Secured* for the **Listening Mode**.
 - 4. Click **OK**. The HTTP port with the default identifier appears in the list of **Listening ports**.

Port Info	
General Advanced N	letwork Security
* ID:	default
* Port:	9092
Connection Protocol:	http
HA sync:	True True
Select Listening Mode:	Unsecured 🗸
Description:	
	OK Cancel

GKC Cluster Port Information

5. Ensure the **Working Directory** and **Command Line** fields contain "." (period).

configuration	options	Permissions	Dependencies	Aldinis	Logs			
- * Server Info						General	Server Info	Network Secur
							_	
Tenants:	T Add 🎡 Ed	it 🙀 Remove						
	Name 🔺				State			
	No objects to (display						
* Host:	<u>gkc-host</u>						×P	
* Listening Ports:	🔚 Add 🎲 Ed	it 🙀 Remove						
	ID 🔺				Port			
	default				8443			
* Working Directory:								
* Command Line:								
Command Line Arguments:								
* Startup Timeout:	90							
* Shutdown Timeou	t: 90							
Backup Server:	[Unknown Bac	ckup Server]					P	
* Redundancy Type:	Not Specified						~	
* Timeout:	10							
* Attempts:	1							
Auto Restart:	True							
Log On As SYSTEM:	True							
* Log On Account:	[Unknown Log	g On Account]					Q	

GKC Cluster Server Information

- 6. Click Save.
- 7. The **Confirmation** dialog for changing the application's port opens. Click **Yes**.

Installing GKC Server

Import the GKC Server Application Template

Start

- 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_Server_850.apd* file available in the *templates* directory of your installation CD. The **New Application Template** panel opens.

Senesys:	Genesys Ad	Iministrator		Tenant: Environment	9	New Window L	og out 🍕) - 🔞 -
MONITORING PROVISIONING	OPERATIONS							
PROVISIONING > Environment >	Application Templates > New	Application Template						
Navigation 《	T Knowledge_Center_S	Server_850 - \Application Templates\G	<c\< th=""><th></th><th></th><th></th><th></th><th></th></c\<>					
📪 Search 🛛 💽	🔀 Cancel 🛃 Save & Close	🛃 Save 🛃 Save & New 🛛 🙀 Reload 🛛 🦉	Import Metadata					
😝 Environment 📃	Configuration O;	ptions Permissions	Dependencies					
📑 Alarm Conditions								
Scripts	* Name:	Knowledge_Center_Server_850]	
Application Templates	* Type:	Genesys Knoweledge Center Server				*		
Applications	* Version:	8.5.0						
Hosts	Metadata:							
Solutions	Metadata Description:							
Time Zones	Metadata Version:							
Business Units/Sites	State:	V Enabled						
Tenants								
Table Access Points								
Formats								
🕞 Fields								
-								

The GKC Server Application Template

5. Click Save and Close.

End

Create Server applications

Start

- 1. Open Genesys Administrator and navigate to **Provisioning > Environment > Applications**.
- 2. In the Tasks panel, click Create New Application.
- In the Select Application Template panel, click Browse for Template and select the Genesys Knowledge Center Server application template that you imported earlier. Click OK.

Bro	wseation			
	 Instructions: Choose objects from 	the list below.		
	the second s			
	plication Templates			a
1]▼ 📄 New 💁 New Folder			
	Name 🔺	Туре	Version	State
_	Filter	Filter	Filter	Filter
-	ew: 📰 Root > 🦳 Application Template	s > <u> </u> GKC		
	Others			Enabled
	Knowledge_Center_Cluster_850	Application Cluster	8.5.0	Enabled
	Knowledge_Center_Server_850_new	Genesys Knoweledge Center Server	8.5.0	Enabled
1	🖣 🛛 Page 1 🔹 of 1 📄 🕅			Displaying objects 1 - 3 of 3
				OK Cancel

Selecting the GKC Server 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 Server 850.xml* file. Click **Open**.
- 6. The metadata file is added to the Select Metadata file panel. Click Next.
- 7. In Specify Application parameters:
 - 1. Enter a name for your application. For instance, Knowledge Center Server'.
 - 2. Enable the **State**.
 - 3. Select the Host on which the GKC Server will reside.
 - 4. Click Create.

Create New Application		
Steps 《	Instructions: Please	se enter the Application parameters. Mandatory parameters are denoted with an asterisk.
 Select Application Template 	Specify Application par	ameters
✓ Select Metadata file		
Specify Application parameters	* Name:	Knowledge Center Server
Results	* Application Prototype:	Knowledge_Center_Server_850_new
	State:	Enabled
	* Host:	<u>gkc host</u> × P
	* Startup Timeout:	90
	* Shutdown Timeout:	90
	* Redundancy Type:	Not Specified 🗸
		Cancel Previous Create > Finis

Creating the GKC Server Application

- 5. The **Results** panel opens.
- 6. Enable **Opens the Application details** form after clicking **Finish** and click **Finish**.

The Knowledge Center Server application form opens and you can start configuring the GKC Server application.

Senesys	Genesys Administrator				Tenant: Environm	ent P	New Window Log o	ut 🗇 • 🛞 •		
MONITORING PROVISIONING	OPERATIONS									
PROVISIONING > Environment > A	pplications > Knowledge C	enter Server								
Navigation	Knowledge Center Se	erver Loading -	Primary - \Application	ns\Knowledge\						
😝 Search 🔹	🗙 Cancel 🚽 Save & Close	: 🛃 Save 🛃 Save 8	8 New 🛛 😹 Reload 🛛 🛋	Start 📓 Stop 💦 Grac	eful Stop					
😝 Environment 📃	Configuration 0	ptions	Permissions	Dependencies	Alarms	Logs				
Alarm Conditions									General Server Info	Network Security
🕞 Scripts	General									
Application Templates	* Name:	Knowledge Ce	edge Center Server							
Applications	* Application Template:	Knowledge Ce	tedae Center Server 850 new							
Hosts	* Type:	Genesys Know	ys Knoweledge Center Server							
Solutions	Version:	8.5.0								
Time Zones	Server:	🔽 True								
Business Units/Sites	State:	Enabled	nabled							
Tenants	Connections:	💽 Add 🍥 Edi	it 🙀 Remove							
Table Access Points		Server 🔺	er Connection Protocol Local Timeout Remote Timeout Trace Mode							
🕞 Formats		No objects to o	o objects to display							
🐻 Fields										
	Server Info									
	- • Network Security									

GKC Server Application Details

End

Configuring the GKC Server Application

Start

- If your Knowledge Center Server application form is not open in Genesys Administrator, navigate to **Provisioning > Environment > Applications**. Select the application defined for the GKC Server and click **Edit...**.
- 2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens. Select the GKC Cluster application, then click **OK**.
- 3. Expand the Server Info pane.
- 4. If your **Host** is not defined, click the lookup icon to browse to the hostname of your application.
- 5. In the **Listening Ports** section, create the default port by clicking **Add**. The **Port Info** dialog opens.
 - 1. Enter the **Port**. For instance, *9092*. This should be the port number for the GKC Server instance.
 - 2. Click **OK**. The port with the default identifier appears in the list of **Listening ports**.

Port Info	
General Advanced N	etwork Security
* ID:	default
* Port:	9092
Connection Protocol:	http
HA sync:	True True
Select Listening Mode:	Unsecured
Description:	
	OK Cancel

GKC Server Port Information

- Optionally, you can explicitly add a Transport port for ElasticSearch engine. If you do not define a transport port, port 9300 will be used. To specify the stop port, click the Add button. The Port Info dialog opens.
 - 1. Enter transport for the ID field.
 - 2. Enter the **Port**. For instance, 9001
 - 3. Click OK.

-	
Port Info	
General Advanced N	letwork Security
* ID:	transport
* Port:	9001
Connection Protocol:	×
HA sync:	True
Select Listening Mode:	Unsecured
Description:	
	OK Cancel

GKC Server Transport Port Information

4. Ensure the Working Directory and Command Line fields contain "." (period).

Configuration	Options	Permissions	Dependencies	Alams	Logs			
• Server Info						General	Server Info	Network Securi
Tenants:								
renancs.	_	lit 🙀 Remove						
	Name 🔺				State			
	No objects to	display						
* Host:	gkc-host						× P	
* Listening Ports:	🔳 Add 🎡 Ed	lit 🙀 Remove						
	ID 🔺				Port			
	default				8443			
* Working Directory:								
* Command Line:								
Command Line Arguments:								
* Startup Timeout:	90							
* Shutdown Timeout	90							
Backup Server:	[Unknown Ba	ckup Server]					P	
* Redundancy Type:	Not Specified						~	
* Timeout:	10							
* Attempts:	1							
Auto Restart:	True 📃							
Log On As SYSTEM:	True							
* Log On Account:	[Unknown Lo	g On Account]					Q	

GKC Server Application Information

- 5. Click Save.
- 6. The Confirmation dialog for changing the application's port opens. Click Yes.
- 7. (Optional) Select the **Options** tab. In the **[log]** section, the **all** option is set to *stdout* by default. Enter a filename if you wish to enable logging to a file. For example, you can enter *stdout*, *C:\Logs\Knowledge\Knowledge_server* to force the system to write logs both to the console and to a file.

; (,			
log/all	log	all	stdout, C:\Logs\Knowledge\Knowledge_server
log/expire	log	expire	20
log/segment	log	segment	10000
log/standard	log	standard	stdout
log/trace	log	trace	stdout
log/verbose	log	verbose	all

GKC Server Application Logging Options

End

Installing GKC Server

Windows Installation Procedure

Start

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



GKC Server Installation Window

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

Genesys Installation Wizard	×		
Connection Parameters to the Configuration Server			
The parameters in the Host and User fields are required to establish a connection to Co Server.	onfiguration		
│			
Specify the host name and port number for the machine on which Configuration Server			
is running. Port: 2020			
└── User ────			
Specify your Configuration Server user User name: default name and password.			
Password:			
< Back Next >	Cancel		

GKC Server 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 into Configuration Server.
- 5. Click Next. The Select Application screen appears.

Genesys Installation Wizard		×
Select Application		
Select Application from the list of configured appli are trying to install is not in the list below contact y		r. If application that you
Knowledge_Center_Server_850		
Application Proportion:		
Application Properties: Type: Genesys Knowledge Center Server (190) Host: idsrv-gks.us.int.genesyslab.com Working Directory: . Command Line: . Command Line Args: .		
ब		Þ
	< Back Next >	Cancel

Selecting the GKC Server Application

- Select the GKC Server application 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.
- 7. Click Next. The Choose Destination Location screen appears.

Genesys Installation Wizard				
Choose Destination Location				
Genesys Installation Wizard will install Knowledge	Center Server in the following Destination Folder.			
To install to this folder, click Next. To install to a different folder, click Browse and select another folder. To restore a path to default Destination Folder, click Default.				
Destination Folder C:\Program Files\GCTI\Knowledge Center Server\Knowledge_Center_Server_850				
	Default Browse			
1				
	< Back Next > Cancel			

Choosing the GKC Server Installation Destination

- 8. Under **Destination Folder**, keep the default value or browse to the desired installation location.
- 9. Click Next. The Backup Configuration Server Parameters screen appears.

Genesys Installation Wizard Backup Configuration Server Para	meters
Host Specify Host name and Port for the machine where the backup of Configuration Server is running.	Host name:
	< Back Next > Cancel

GKC Backup Config Server Parameters

- 10. If you have a backup Configuration Server, enter the Host name and Port.
- 11. Click **Next**. Choose the appropriate version of the Java JDK.

nesys Installation Wizard		×
Select Installed Sun's Java Developmer	nt Kit (JDK)	
Select Sun's Java Development Kit (JDK) from t installed on target computer. Product properties		
Sun's Java Development Kit (JDK) 1.7.0_45		
Sun's Java Development Kit (JDK) prop	erties:	
Version: 1.7.0 Patch Number: 45	ciuca.	
Location: C:\Program Files\Java\jdk1.7.0_45		*
		▲ ▼ ▶

Selecting the GKC Server Java Version

12. Click Next. The Ready to Install screen appears.

Genesys Installation Wizard	×		
Ready to Install			
Genesys Installation Wizard has collected all required information and is ready to install Knowledge Center Server on your computer.			
To install Knowledge Center Server, click Install. To review settings, click Back. To exit the Wizard, click Cancel.			
	< Back Install Cancel		

GKC Server is Ready to Install

- 13. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for Backend Server. When through, the **Installation Complete** screen appears.
- 14. Click **Finish** to complete your installation.
- 15. Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.

Important

The Windows service will not be automatically configured during installation. To configure the

Windows service, start server.bat with the following parameters: server.bat install. To run the server as service, comment out the (REM) APP_TYPE property in senenv.bat before installing the service.

End

Linux Installation Procedure Start

- 1. Open a terminal in the Genesys Knowledge Center Server CD/DVD or the Genesys Knowledge Center Server 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:
 - 1. Hostname—For instance, demosrv.genesyslab.com
 - 2. Listening port—For instance, 2020
 - 3. User name—For instance, *demo*
 - 4. 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 Genesys Knowledge Center Server applications is displayed.
- 6. Enter the key for the Genesys Knowledge Center Server application that you created previously on Configuration Server.
- 7. Enter the full path to your installation directory and confirm that it is correct.

If the installation is successful, the console displays the following message: Installation of Genesys Knowledge Center Server, version 8.5.x has completed successfully.

End

Understanding the GKC Server Configuration Files

GKC Server includes an embedded Jetty server and Lingua Tools in its installation folder. Product installation pre-configures all of the links between these resources, but there are cases in which they need to be changed. This section describes how to work with the configuration files stored in the GKC Server.

Jetty Configuration

- 1. Create a *work* directory inside the *./server* folder in the installation directory as a place to store temporary Jetty files.
- 2. Create a *data* directory inside the *./server* folder in the installation directory to store the ElasticSearch data files.
- 3. After you complete these steps, GKC Server will be available as a web service on the following URLs:
 - http://host:jetty.port/gks-server—GKC Server
 - http://host:jetty.port/gks-sample-ui—Sample UI sandbox

ElasticSearch Engine Configuration

- 1. Go to the ./server folder and open the gks.yml configuration file.
- 2. Configure the following settings:
 - 1. index.number_of_shards: #—Number of ElasticSearch shards
 - 2. path.data : [PATH]—Path to the folder that contains index data for this node (default: /gks/data)
 - 3. path.similarwords.en: [PATH]—Path to dictionary compendium
 - 4. path.freeling : [PATH]—Path to Freeling data folder

Language Resources Configuration

- Dictionary compendium
 - You can set the path to /linguatools/disco/enwiki-20130403-sim-lemma-mwllc inside the installation directory to path.similarwords.en in gks.yml
- Freeling tokenizer:
 - In Windows
 - The path to */linguatools/freeling/data/* can be changed in the *gks.yml* file: *path.freeling*.
 - The following path will be added to the Windows PATH variable during installation: *Path to installation directory*/linguatools/freeling/ bin.
 - In Linux
 - The path to */linguatools/freeling/data/* can be changed in the *gks.yml* file: *path.freeling*.
 - setenv.sh exports the following environment variables:
 - FREELINGSHARE—Path to Path to installation directory/linguatools/freeling
 - LD_LIBRARY_PATH—Path to Path to installation directory/linguatools/freeling/bin

Configuration Options

GKC Cluster Application Options

C	onfiguration	Options	Permissions	Dependencies	Alarms	Logs				
🗈 New 🙀 Delete 👲 Export 🚡 Import										
	Name 🔺				Section	Option		Value		
T	Filter				Filter		Filter		Filter	
🖃 general (1 Rem)										
	Time to live for session	n			general		session-ttl		8h	
	∃ internal (2 Rems)									
	internal/languages				internal		languages		[("id":"en","name":"English"]]	
	internal/options				internal		options		{"faq":{"outOfDomain":{"optionType":"float","default\/alue":"0.6","display	
□ multicast (1 Rem)										
	Enable multicast functionality				multicast		enabled		true	
G reporting (1 Rem)										
	Time to live				reporting		tti		14d	
G security (3 Items)										
	Authorization			security		auth-scheme		none		
	Password			security		password				
►	User ID	security			security	urity user-id			default	

GKC Cluster Application Configuration Options

[general] section

session-ttl Default Value: 8h

Valid Values: number + unit, e.g. 1d or 3m. Supported units: d (days), m (minutes), h (hours), or w(weeks)

Changes Take Effect: After restart.

Specify time that server will store session information while no activities are taking place.

[multicast] section

enabled Default Value: true Valid Values: true, false Changes Take Effect: After restart. Specify whether enabled node should use multicast or unicast to discover other servers within the same cluster.

[reporting] section

ttl Default Value: 14d **Valid Values:** number + unit, e.g. 1d or 3m. Supported units: d (days), m (minutes), h (hours), or w(weeks) **Changes Take Effect:** After restart. Specify time that records will be stored in the history.

[security] section

auth-scheme Default Value: none Valid Values: none, basic Changes Take Effect: After restart. Specifies the HTTP authentication scheme used to secure REST API requests to the Knowledge Server. With the Basic scheme, clients must be authenticated with a user ID and password.

user-id Default Value: none **Valid Values:** string **Changes Take Effect:** After restart. The user identifier (login) used in authentication for the REST API

password Default Value: none
Valid Values: string
Changes Take Effect: After restart.
The user password used in authentication for the REST API.

[internal] section

Important

GKC Server uses this section to store internal

initialization parameters. Do not attempt to change these options.

GKC Server Application Options

C	onfiguration	Options	Permissions	Dependencies	Alarms	Logs				
	New 🙀 Delete 👱	Export						View:	Advanced View (Options)	~
	Name 🔺	Name 🔺				Option	Value			
7	Filter				Filter	Filter		Filter		
∃ archiving (4 Itens)										
	Archive Type				archiving	type		tar		
₽	Enable archiving fun	nable archiving functionality			archiving	enabled				
	Local path archives	ocal path archives stored in			archiving	path				
	archiving/archiving				archiving	archiving		true		
∃ log (6 Itens)										
	log/all				log	all		stdout, log_node.log	tdout, log_node.log	
	log/expire				log	expire		20		
	log/segment	J/segment			log	segment		10000		
	log/standard	/standard			log	standard				
	log/trace	/trace			log	trace				
	log/verbose I			log	verbose		all			

GKC Server Application Configuration Options

[archiving] section

enabled Default Value: true Valid Values: true, false Changes Take Effect: After restart. Specifies whether a node will allow to execute archiving using its API. Enabling archiving on the node does not affect other nodes of the cluster. Archiving is resource consuming functionality - use it wisely.

type Default Value: tar Valid Values: tar, zip, cpio Changes Take Effect: After restart. Defines format of resulted archive will be stored in.

path

Default Value: none Valid Values: string Changes Take Effect: After restart. Path to the stored archive. The archive will be stored as <path>/history_<requested_date_range>.<archive>

[security] section

trusted-ca-type

Default Value: MSCAPI

Valid Values: MSCAPI – MSCAPI certificate storage is used for TLS certificate verification. PEM – PEM certificate storage is used for TLS certificate verification. In this case, the trusted-ca option should also be specified and should contain the path to the PEM file. JKS – JKS certificate storage is used for TLS certificate verification. In this case, the trusted-ca option should also be specified and should contain the path to the JKS file. You should also set the trusted-ca-pwd option to the password for the JKS file.

Changes Take Effect: After restart.

Specifies the type of trusted certificate authority. No TLS is applied for connections between this server and other Genesys servers if this option is absent.

trusted-ca

Default Value: none

Valid Values: Path to the trusted store file (valid for PEM and JKS types, depending on value of the trusted-ca-type option).

Changes Take Effect: After start or restart.

Specifies the path to the trusted store file (valid for PEM and JKS types, depending on value of the trusted-ca-type option).

trusted-ca-pwd Default Value: none Valid Values: Password for the trusted store file (valid for JKS type only). Changes Take Effect: After start or restart. Specifies the password for the trusted store file (valid for JKS type only).

[log] section

all

Default Value: stdout

Valid Values (log output types):

stdout	Log events are sent to the Standard output (stdout).			
stderr	Log events are sent to the Standard error output (stderr).			
network	Log events are sent to Message Server, which can reside anywhere on the network. Message Server stores the log events in the Log Database. Setting the all log level option to the network output enables an application to send log events of the Standard, Interaction, and Trace levels to Message Server. Debug-level log events are neither sent to Message Server nor stored in the Log Database.			
memory	Log events are sent to the memory output on the local disk. This is the safest output in terms of the application performance.			
[filename]	Log events are stored in a file with the specified name. If a path is not specified, the file is created in the application's working directory.			

Changes Take Effect: After start or restart.

Specifies the outputs to which an application sends all log events. The log output types must be separated by a comma when more than one output is configured. For example: all = stdout, logfile

standard Default Value: stdout Valid Values:

stdout	Log events are sent to the Standard output (stdout).
stderr	Log events are sent to the Standard error output (stderr).
network	Log events are sent to Message Server, which can reside anywhere on the network. Message Server stores the log events in the Log Database.
memory	Log events are sent to the memory output on the local disk. This is the safest output in terms of the application performance.
[filename] Log events are stored in a file with the specified name. If a path is not specified, the file is created in the application's working directory.

Changes Take Effect: Immediately

Specifies the outputs to which an application sends the log events of the Standard level. The log output types must be separated by a comma when more than one output is configured. For example: standard = stderr, network

trace Default Value: stdout Valid Values:

stdout	Log events are sent to the Standard output (stdout).
stderr	Log events are sent to the Standard error output (stderr).
network	Log events are sent to Message Server, which can reside anywhere on the network. Message Server stores the log events in the Log Database.
memory	Log events are sent to the memory output on the local disk. This is the safest output in terms of the application performance.
[filename]	Log events are stored in a file with the specified name. If a path is not specified, the file is created in the application's working directory.

Changes Take Effect: Immediately

Specifies the outputs to which an application sends the log events of the Trace level and higher (that is, log events of the Standard, Interaction, and Trace levels). The log outputs must be separated by a comma when more than one output is configured. For example: trace = stderr, network

verbose Default Value: standard Valid Values:

all	All log events (that is, log events of the Standard, Trace, Interaction, and Debug levels) are generated.
debug	The same as all.
trace	Log events of the Trace level and higher (that is, log events of the Standard, Interaction, and Trace levels) are generated, but log events of the Debug level are not generated.

interaction	Log events of the Interaction level and higher (that is, log events of the Standard and Interaction levels) are generated, but log events of the Trace and Debug levels are not generated.
standard	Log events of the Standard level are generated, but log events of the Interaction, Trace, and Debug levels are not generated.
none	No output is produced.

Changes Take Effect: Immediately

Determines whether a log output is created. If it is, specifies the minimum level of log events generated. The log events levels, starting with the highest priority level, are Standard, Interaction, Trace, and Debug.

segment Default Value: 1000 Valid Values:

expire

false	No segmentation is allowed.
<number> KB or <number></number></number>	Sets the maximum segment size, in kilobytes. The minimum segment size is 100 KB.
<number> MB</number>	Sets the maximum segment size, in megabytes.
<number> hr</number>	Sets the number of hours for the segment to stay open. The minimum number is 1 hour.

Changes Take Effect: After restart.

Specifies whether there is a segmentation limit for a log file. If there is, sets the mode of measurement, along with the maximum size. If the current log segment exceeds the size set by this option, the file is closed and a new one is created. This option is ignored if log output is not configured to be sent to a log file.

Default Value: 3 Valid Values:	
false	No expiration; all generated segments are stored.
<number> file or <number></number></number>	Sets the maximum number of log files to store. Specify a number from 1—1000.
<number> day</number>	Sets the maximum number of days before log files are deleted. Specify a number from 1—100.

Changes Take Effect: After restart.

Determines whether log files expire. If they do, sets the measurement for determining when they expire, along with the maximum number of files (segments) or days before the files are removed. This option is ignored if log output is not configured to be sent to a log file.

Important



If an option's value is not set within the range of valid values, it will automatically be reset to 10.

affectedLoggers

Default Value: None

Valid Values: The names of loggers, separated by a semicolon (;), specified in the LOG4J2.xml. For example:

com.genesyslab.webme.commons;PROTOCOL;org.apache.cassandra

Changes Take Effect: Immediately

Verbosity settings are explicitly applied for the following loggers:

- Loggers that are not declared explicitly in the *log4j2.xml* configuration file.
- Loggers that are specified explicitly in the *log4j2.xml* and are specified in the value for this affectedLoggers option.

For other loggers specified in *log4j2.xml*, but not mentioned in the value for this option, the verbosity level is not re-applied.

Here is a use case for when you might need to set this option:

• Cassandra needs to write error messages to a log file, and at the same time, Genesys components also need to write debug messages to the log file.

To resolve this use case, you would:

- 1. Specify the following logger in *log4j2.xml*: <*logger name="org.apache.cassandra" level="error" additivity="false">*
- 2. Do not include org.apache.cassandra in the value for the affectedLoggers option.
- 3. The default *log4j2.xml* file contains the following logger: *<logger name=* "com.genesyslab.platform" level="info" additivity="false">
- 4. Include *com.genesyslab.platform* in the value for the **affectedLoggers** option.
- 5. Set the **verbose** option to *debug*.

In the sample above, the value of **affectedLoggers** should be *com.genesyslab.platform*. Error (but not debug or info) messages from Cassandra will be available in logs, and debug messages from *com.genesyslab.platform* will be available in logs.

time_format Default Value: time Valid Values:

time	The time string is formatted according to the HH:MM:SS.sss (hours, minutes, seconds, and milliseconds) format.
locale	The time string is formatted according to the system's locale.
ISO8601	The date in the time string is formatted according to the ISO 8601 format. Fractional seconds are given in milliseconds.

Changes Take Effect: Immediately

Specifies how to represent, in a log file, the time when an application generates log records. A log record's time field in the ISO 8601 format looks like this: 2001-07-24T04:58:10.123

time_convert Default Value: local Valid Values:

Iocal The time of log record generation is expressed as a local time, based on the time zone and any seasonal adjustments. Time zone information of the application's host computer is used.

utc The time of log record generation is expressed as Coordinated Universal Time (UTC).

Changes Take Effect: Immediately

Specifies the system in which an application calculates the log record time when generating a log file. The time is converted from the time in seconds since 00:00:00 UTC, January 1, 1970.

Provide GKC Access to Agents

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

- Knowledge.ADMINISTER—Configure knowledge bases in the GKC Cluster application
- Knowledge.AUTHOR—Create, populate, and manage knowledge bases

• **Knowledge.REPORTING**—Extract data on the activities carried out by agents and customers while using the knowledge service

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.

Description:	Role for manage Knowledge	le for manage Knowledge Center									
Tenant:	Environment	vironment X									
State:	✓ Enabled										
Members											
Users:	🖬 Add 🎲 Edit 🙀 Remove	dd 🎲 Edit 🎆 Remove									
Access Groups:	User Name 🔺	Agent	Last Name	First Name	Employee ID	State					
	No objects to display										
	🖬 Add 🎡 Edit 🙀 Remove										
	Name 🔺		Туре		State						
	No objects to display										

GKC Server Access Roles

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

Configuration	Role Privileges	Permissions				
🗂 Allow All 👲 Export	Timport				View privileges: All	~
dd/Remove Products	v	Genesys Knowledge Center Genesys Knowledge Center Genesys Administrator		* *		
Name 🔺					▼ Value	
Filter					Filter	
Genesys Knowledge	Center Server Pr	rivileges (3 Items)				
Allows agent to chang	e data in a knowled	ge base			Allowed	
Allows agent to manage knowledge bases				Allowed		
	porting capabilities				Allowed	

Setting GKC Server Access Privileges

- 7. Go back to the **Configuration** tab.
- In the Members section, add the appropriate Agent or Agent Group by clicking the Add\ button.

Users: Add @ Edit mg Remove										
	Access Groups:	User Name 🔺	Agent	Last Name	First Name	Employee ID	State			
		default	False	default	default	0	Enabled			
		🗖 Add 🎲 Edit 🙀 Remove								
		Name 🔺		Туре		State				
		Administrators		Administrators		Enabled				

GKC Server Members Section

ral Memb

9. Save and Close.

End

Installing the GKC CMS

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_850.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.

Genesys	Genesys Ac	ministra	for			Tenant:	Environment	2	New Window	Log out 🤇
MONITORING PROVISIONING	OPERATIONS									
PROVISIONING > Environment > /	Application Templates > Nev	Application Tem	plate							
Navigation	T Knowledge_Center_	CMS_850 - \Appli	cation Templates\GKC	1						
🙀 Search 🔹	🔀 Cancel 🛃 Save & Clos	🚽 Save 🛃 Save	& New 🛛 😹 Reload 🛛 🛜	Import Metadata						
😝 Environment 📃	Configuration	ptions	Permissions	Dependencies						
Alarm Conditions										
🙀 Scripts	* Name:	Knowledge_O	enter_CMS_850							
Application Templates	* Type:	Genesys Know	rledge Center CMS							~
Applications	* Version:	8.5.0								
Hosts	Metadata:									
Solutions	Metadata Description:									
Time Zones	Metadata Version:									
Business Units/Sites	State:	Enabled								
🕞 Tenants										
Table Access Points										
Formats										
🙀 Fields										

The GKC CMS Application Template

5. Click Save and Close.

End

Create CMS Applications Start

- 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 Server application template that you imported earlier. Click **OK**.

Bro	owseation			×
	 Instructions: Choose objects 	s from the list below.		
An	plication Templates			
-) 🔻 📄 New 😤 New Folder			dh.
	Name 🔺	Туре	Version	State
T	Filter	Filter	Filter	Filter
Vie	ew: 📄 Root > 🚞 Application Ter	mplates > 🛅 GKC		
	Others			Enabled
	Knowledge_Center_Cluster_850	Application Cluster	8.5.0	Enabled
	Knowledge_Center_CMS_850	Genesys Knowledge Center CMS	8.5.0	Enabled
	Knowledge_Center_Server_850	Genesys Knoweledge Center Ser	8.5.0	Enabled
14	4 Page 1 of 1 🕨 🕅 🧟	9 *		Displaying objects 1 - 4 of 4
				OK Cancel

Selecting the GKC 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_850.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:
 - 1. Enter a name for your application. For instance, *Knowledge Center CMS*.
 - 2. Enable the **State**.
 - 3. Select the Host on which the CMS load-balancer will reside.
 - 4. Click Create.

Create New Application			
Steps «	Instructions: Please	se enter the Application parameters. Mandatory parameters are denoted with an asterisk.	
 Select Application Template 	Specify Application par	ameters	
🖌 Select Metadata file			
Specify Application parameters	* Name:	Knolwedge CMS	
Results	* Application Prototype:	Knowledge_Center_CMS_850	
	State:	Enabled	
	* Host:	gkc_host × P	
	* Startup Timeout:	90	
	* Shutdown Timeout:	90	
	* Redundancy Type:	Not Specified 🗸	
		Cancel Create Create	Finish

Creating the GKC CMS Application

- 8. The **Results** panel opens.
- 9. Enable **Opens the Application details form after clicking 'Finish'** and click **Finish**. The GKC Cluster application form opens and you can start configuring the Cluster application.

Configuration	Options		Permissions	Dependencies	Alarms	Logs				
▲ * General								General	Server Info	Network Security
* Name:	Kn	olwedge CMS	5							
* Application Templa	te: Kn	owledge Cer	iter CMS 850						× P	
* Type:	Ge	nesys Knowle	edge Center CMS						~	
Version:	8.5									
Server:	V	True								
State:	V	Enabled								
Connections:	ī	Add 🎡 Edit	Remove							
	Se	rver 🔺	C	onnection Protocol	Local Timeou		Remote Timeout	Trace Mode		
	N	o objects to di	splay							
-(•)* Server Info										
Network Secur	ity									

Configuring the GKC CMS Cluster

End

Configure the CMS Application Start

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

- 2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens.
- 3. Select the GKC 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.
- 7. Enter the Port. For instance, 9000.
- 8. Click **OK**. The port with the default identifier appears in the list of **Listening ports**.

General Advanced	Network Security	
		_
* ID:	default	
* Port:	9000	
Connection Protocol:		~
HA sync:	True	
Select Listening Mode	Unsecured	*
Description:		
	ОКСС	ancel

GKC CMS Port Information

9. Ensure the Working Directory and Command Line fields contain "." (period).

				General	Server Info	Network Sec
Server Info						
Tenants:	Edit 🙀 Remove					
	Name 🔺		State			
	No objects to display					
* Host:	<u>gkc-host</u>				x p	
* Listening Ports:	Edit 🙀 Remove					
	ID 🔺		Port			
	default		8443			
* Working Directory:						
* Command Line:						
Command Line Arguments:						
* Startup Timeout:	90					
* Shutdown Timeout:	90					
Backup Server:	[Unknown Backup Server]				Q	
* Redundancy Type:	Not Specified				~	
* Timeout:	10					
* Attempts:	1					
Auto Restart:	True True					
Log On As SYSTEM:	True					
Log On Account:	[Unknown Log On Account]				Q	

GKC CMS Cluster Information

- 10. Click Save.
- 11. The **Confirmation** dialog for changing the application's port opens. Click **Yes**.

End

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.



GKC CMS installation Window

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

Connection Parameters to the Config The parameters in the Host and User fields a Server	are required to establish a connection to Configuration
 Host Specify the host name and port number for the machine on which Configuration Server is running. 	Host name: localhost Port: 2020
User Specify your Configuration Server user name and password.	User name: default Password: •••••••
	< Back Next > Cancel

GKC 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.
- Select the GKC 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.

nesys Installation Wizard			Ì
Select Application			
Select Application from the list of configured appl are trying to install is not in the list below contact			pplication that you
GKC_CMS_IP			
Application Properties: Type: Genesys Knowledge Center CMS (191)			_
Host: gks-dep-nghtly Working Directory: .			
Command Line: . Command Line Args: .			
T			F
	< Back	Next >	Cancel

Selecting the GKC 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.

Genesys Installation Wizard
Choose Destination Location
Genesys Installation Wizard will install Knowledge CMS in the following Destination Folder.
To install to this folder, click Next. To install to a different folder, click Browse and select another folder. To restore a path to default Destination Folder, click Default.
Destination Folder
C:\Program Files\GCTI\Knowledge CMS\GKC_CMS_IP
Default Browse
< Back Next > Cancel

Choosing the GKC CMS Installation Destination

9. Click **Next**. Choose the appropriate version of the Java JDK.

nesys Installation Wizard		
Select Installed Sun's Java Developme	nt Kit (JDK)	
Select Sun's Java Development Kit (JDK) from installed on target computer. Product properties		
Sun's Java Development Kit (JDK) 1.7.0_55		
Sun's Java Development Kit (JDK) prop	erties:	
Version: 1.7.0 Patch Number: 55	erties:	4
Version: 1.7.0	erties:	
Version: 1.7.0 Patch Number: 55	erties:	
Version: 1.7.0 Patch Number: 55	erties:	

Selecting the GKC CMS Java Version

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

Genesys Installation Wizard
Ready to Install
Genesys Installation Wizard has collected all required information and is ready to install Knowledge CMS on your computer.
To install Knowledge CMS, click Install. To review settings, click Back. To exit the Wizard, click Cancel.
< Back Install Cancel

GKC CMS 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:
 - 1. Hostname—For instance, demosrv.genesyslab.com
 - 2. Listening port—For instance, 2020
 - 3. User name—For instance, *demo*
 - 4. 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 GKC CMS applications is displayed.
- 6. Enter the key for the GKC 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, version 8.5.x has completed successfully.

End

Configuring the CMS

The GKC Server includes an embedded Jetty server. After installation, you can carry out your initial configuration by creating a *work* directory for temporary Jetty files inside the *./server* folder.

Configure Required CMS Access Options

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

- Knowledge.CMS.Document.Author—create, edit, or delete documents
- Knowledge.CMS.Category.Author—create, edit, or delete categories
- Knowledge.CMS.Approver—approve documents and categories, and export data
- Knowledge.CMS.Administrator—create, edit, or delete knowledge bases



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.

Senesys		Genesys A	Administrat	or		Tenant: Environment 🖉 New Window	Log ou	t 🗇 🕶	• 🔞	
MONITORING PROVISION	ING	OPERATIONS								
PROVISIONING > Accounts >	Role	> New Role								
Navigation	~	- \Roles	- \Roles\							
🥁 Search	۰	🗶 Cancel 🛃 Save & G	Close 🛃 Save 🛃 Save I	k New 🛛 😹 Reload 🛛 🄇	🕑 Va	alidate Permissions				
🔯 Environment	۰	Configuration	Role Privileges	Permissions						
😝 Switching	۰						0	Seneral M	lember	
😝 Routing/eServices	۰	General								
😝 Desktop	÷	* Name:	knowledge_cn	ns_manager						
🕞 Accounts	Ξ	Description:	Role for CMS r	nanager						
🙀 Users		Tenant:					x p			
📑 Skills		State:	Enabled							
🙀 Agent Groups										
🙀 Access Groups		- Members								
🐻 Roles										

GKC 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.

Configuration Role Privileges Permissions	
📰 Allow All 👲 Export 🍯 Import	View privileges: All
Add Remove Products Products Center 5 50000 Centerys Rookedge Center 5 50000 Centerys Rookedge Center 5 50000 Centerys Rookedge Center 5 50000	
Name 🔺	Value
Y Filter	Filter
Genesys Knowledge Center CMS Privileges (4 Items)	
Administrator	Allowed
Approver	Allowed
Category Author	Allowed
Document Author	Allowed

Setting GKC CMS Access Privileges

- 7. Go back to the **Configuration** tab.
- 8. In the **Members Section**, add the appropriate Agent or Agent Group by clicking the **Add** button.

Members						
Users:	🗖 Add 🎡 Edit 📷 Remove					
	User Name 🔺	Agent	Last Name	First Name	Employee ID	State
	default	False	default	default	0	Enabled
Access Groups:	🗖 Add 🎲 Edit 🙀 Remove					
	Name 🔺		Туре		State	
	Administrators		Administrators		Enabled	

GKC CMS Members Section

9. Save and Close.

End

Installing and Using the Administrator Plugin

Installing the GKC Plugin for Administrator

Prerequisites

- Genesys Administrator must have been installed, but should be stopped before installing the plugin
- If the Administrator Plugin was previously installed on the current host, manually remove the previous version from the */plug-ins* folder in the Genesys Administrator installation directory

Windows Installation Procedure

Start

1. In your installation package, locate and double-click the **setup.exe** file. Install Shield opens its welcome screen.



GKC Administrator Plugin Install Shield Window

2. Click Next. The Choose Destination Location screen appears.

Genesys Installation Wizard	<u>-</u>
Choose Destination Location	
Genesys Installation Wizard will install Genes following Destination Folder. To install to this folder, click Next. To install to a different folder, click Browse a To restore a path to default Destination Folde	
Destination Folder C:\Program Files\GCTI\KnowCntPlgnAdm	
	Default Browse

GKC Administrator Plugin Destination Window

- 3. Under **Destination Folder**, keep the default value or browse to the desired installation location. Click **Next**.
- 4. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for the Backend Server. When it has finished, the **Installation Complete** screen appears.

Genesys Installation Wizard	×
Ready to Install	
Genesys Installation Wizard has collected all req Knowledge Center Plugin for Administrator on yo	quired information and is ready to install Genesys our computer.
To install Genesys Knowledge Center Plugin for To review settings, click Back. To exit the Wizar	
	< Back Install Cancel

GKC Administrator Plugin Installation Complete

- 5. Click **Finish** to complete your installation.
- 6. Inspect the directory tree of your system to make sure that the files have been installed in the location that you intended.
- 7. gax-plugin-knowledge.jar should be added as a Genesys Administrator plugin.
- 8. Restart Genesys Administrator.

End

Linux Installation Procedure Start

- 1. Open a terminal in the Genesys Knowledge Center Plugin for Administrator IP, and run the *install.sh* file. The Genesys Installation starts.
- 2. Enter full path to the GAX installation directory.
- 3. Enter full path to your installation directory for the plugin and confirm it.
- If the installation is successful, the console displays the following message: Installation of Genesys Knowledge Center Plugin for Administrator, version 8.5.x has completed successfully.
- 5. gax-plugin-knowledge.jar should be added as a Genesys Administrator plugin.
- 6. Restart Genesys Administrator.

End

A Knowledge Center item should appear under the Administration menu.



Knowledge Center in Administrator Menu

Important Users must have Knowledge.ADMINISTER privileges in order to use the Administrator plugin.

Managing Knowledge Bases

In order to use GKC Server you need to create at least one knowledge base in the GKC Cluster application, using the GKC Plugin for Administrator. This section describes the structure and specific options you need in order to create an index for this knowledge base in GKC Server.

Selecting the GKC Cluster Application Prerequisites

- - The Administrator user must have Knowledge.ADMINISTER privileges

Start

1. Log in to Genesys Administrator and navigate to the **Administration > Knowledge Center** menu item. **m**

2. Using the button, open the menu for Select Knowledge Cluster. Select the appropriate cluster from the drop-down and click the Ok button. A list of the knowledge bases that have been defined for this cluster will be displayed.

90					Administration			
К	íno	wledg	e_Sp	ace				
	Kno	wledge_S	space		< >	Knowledge Cluster Selection	×	
	Q,	Quick Filter		+	0 🛳	Knowledge Cluster Application		
					Purge All	Knowledge_Space	×	
	ID		Kno	wledge Base Nam	e		Ok	
	No ite	ems						

Selecting a Knowledge Cluster

End

Creating a Knowledge Base

Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application

Start

- 1. Click the + button. A panel with the main knowledge base parameters will be displayed. Fill in the following fields:
 - **ID**—The ID should only contain numbers, lower-case Latin letters, and underscores, with a maximum length of 50 characters. The limitation to lower-case letters is because ElasticSearch is case-insensitive and will therefore render all names as lower-case.
 - Name—Maximum length is characters
 - Description—optional
 - Select the default knowledge base language.
 - Make the knowledge base public or private. (If the knowledge base is made public, it will be visible to all users, whether or not they are authorized.)
 - Make the knowledge base active or inactive. (If the knowledge base is made inactive, the knowledge base will be hidden from active users.)

(nowledge_Sp	ace			< >		New K	nowledge B	ase	< >
Q Quick Filter		+	0				Delete	Purge	Options
			Ρι	ırge All		ID *			0
D	Knowledg	je Base Nar	ne			knowled	dgeFAQ		
Vo items						Name *			0
to nellia						Knowled	dge Center FAQ		
						Descripti	ion		0
						Knowled	dge base for basic	Knowledge Cen	ter FAQ
						Default la	anguage *		0
					::	English	h		~
						✓ Know	vledge base is acti	ive	
						 Know 	vledge base is pub	lic	

Creating a Knowledge Base

2. Click Save. The knowledge base will be created.

End

Creating Custom Fields Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application
- · You must create and select a knowledge base definition

Start

1. Click the + sign under the **Custom Fields** section. The **New Custom Field** panel will be displayed.

Knowled	dge Center	FAQ	< ×	New Custom Field <	×
	Delete	Purge	Options	Name *	Ð
			Â	number	
Name *			0	Display Name *	Ð
Knowledg	je Center FAQ			Number for Knolwedge Base	
Description	n		0		
Knowledg	e base for basic	Knowledge Cen	ter FAQ	Type *	Ð
				Numeric	•
Languages	*		0	Default Value	Ð
English, d	efault			100	
✓ Knowle Custom Fie		lic	+	Minimum Value 1 Maximum Value 1000 Maximum Value Save Cancel	
string)	led for Knolwedg	le base (custon	+		

Creating a Custom Field

- 2. To define a custom field, fill in the following information:
 - **Name**—Should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters.
 - Display name
 - Select the type of field
 - For String fields define:
 - Default value (optional)
 - If the field can be left empty, set the check box to Allow empty
 - For Numeric fields define:
 - Default value (optional)
 - Minimum value (optional)
 - Maximum value (optional)
 - For **DateTime** fields define:
 - Default value (optional)
 - Format (optional)

5. Click **Save** to save your changes.

End

Adding Language-specific Information Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- · You must create and select a GKC Cluster application
- · You must create and select a knowledge base definition

Start

1. Click the **English**, **default** row in the **Languages** section. A panel with languagespecific settings will be displayed.

Languages * English, default English, default Custom Fields No items Filter can consist of basic and custom fields of knowledge base is public (e.g. CreatedDate>2014-01-01 AND Segment=="""	Language * English edge Center FAQ trion edge base for basic Knowledge Center FAQ ges * h, default	Knowledge Center FAQ	< ×	English	<
Name * Knowledge Center FAQ Description Image: Set as default language Knowledge base for basic Knowledge Center FAQ Knowledge base for basic Knowledge Center FAQ Languages * Image: Set as default language Knowledge base for basic Knowledge Center FAQ Knowledge base for basic Knowledge Center FAQ Knowledge base for basic Knowledge Center FAQ Image: Set as default language Knowledge base for basic Knowledge Center FAQ Image: Set as default language Knowledge base for basic Knowledge Center FAQ Image: Set as default language Image: Set as default language Knowledge base for basic Knowledge Center FAQ Image: Set as default filter conditions Image: Set as default filter conditions <th>edge Center FAQ ntion edge base for basic Knowledge Center FAQ iges * ih, default Default filter conditions No items Pilter can consist of basic and custom fields of the knowledge base is public Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP") Save Cancel</th> <th>Delete Pur</th> <th>ge Options</th> <th>Language *</th> <th></th>	edge Center FAQ ntion edge base for basic Knowledge Center FAQ iges * ih, default Default filter conditions No items Pilter can consist of basic and custom fields of the knowledge base is public Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP") Save Cancel	Delete Pur	ge Options	Language *	
Knowledge Center FAQ Description Knowledge base for basic Knowledge Center FAQ Languages * English, default Mowledge base is active Knowledge base is active Custom Fields No items	edge Center FAQ tion tion tion		A	English	
Description Knowledge base for basic Knowledge Center FAQ Languages * English, default Moitems + * Knowledge base is active * Knowledge base is active * Knowledge base is active * Knowledge base is public Custom Fields No items * No items	stion Image: Content FAQ iges * Image: Content FAQ iges * Image: Content FAQ in the default Image: Content FAQ image: Content FAQ Image: Content FAQ <td< td=""><td>Name *</td><td>0</td><td>✓ Set as default language</td><td></td></td<>	Name *	0	✓ Set as default language	
Knowledge base for basic Knowledge Center FAQ Languages * English, default Default filter conditions No items Filter can consist of basic and custom fields of knowledge atticle. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment==***********************************	edge base for basic Knowledge Center FAQ ges * h, default + bwledge base is active bwledge base is public In Fields ms Save Cancel Cancel Cance	Knowledge Center FAQ		Knowledge base name	
Knowledge base description English, default English, default Default filter conditions No items Filter can consist of basic and custom fields of knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="">	Images * in, default Images * Ima	Description	0	Knowledge Center FAQ	
Languages * English, default Pefault filter conditions No items * Moitems Filter can consist of basic and custom fields of knowledge base is public Custom Fields No items Filter can consist of basic and custom fields of knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment==***********************************	igges * h, default Default filter conditions No items No items Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="vilp") Save	Knowledge base for basic Knowled	lge Center FAQ	Knowledge base description	
Knowledge base is active Knowledge base is public Custom Fields No items	+ No items bwledge base is active - bwledge base is public - n Fields • ms - Save Cance	Languages *	0	Knowledge base for basic Knowledge Center F.	AQ
Image: Second system Image: Second system Image: Second	+ owledge base is active owledge base is public on Fields I Trields I Trield	English, default		Default filter conditions	
 Knowledge base is active Knowledge base is public Custom Fields No items 	wiedge base is active owledge base is public n Fields ms Save Cance			No items	
✓ Knowledge base is public Custom Fields Filter can consist of basic and custom fields of knowledge article. No items All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment==	Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP"		+		
Custom Fields Image: Custom Fields of knowledge article. No items All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment==	Filter can consist of basic and custom fields of the knowledge article. All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP") Save Cance	✓ Knowledge base is active			
No items All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment==*	All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP" Save Cance				the
(e.g. CreatedDate>2014-01-01 AND Segment=="	(e.g. CreatedDate>2014-01-01 AND Segment=="VIP"		0		
		Noitems		(e.g. CreatedDate>2014-01-01 AND Segment=="	
Save C	+				VIP"
	+			Save	

Adding Language-Specific Information

- 2. You can define the following parameters in this section:
 - A localized knowledge base name
 - A localized knowledge base description
 - Whether or not the selected language is the default
 - Default filter conditions
- 5. To create a default filter condition click on the + under the **Default filter conditions** section and fill in the appropriate mandatory fields:
 - Select the appropriate field (custom or basic)
 - Select a filter operator
 - Fill in the values for the filter criteria

Important

All filter criteria are applied using AND logic. For

example, CreatedDate>2014-01-01 AND Segment=="VIP".



Default Filter

4. Click the Save button

End

Editing Knowledge Base Options Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application
- You must create and select a knowledge base definition

Start

1. To edit the options for a particular knowledge base, click the **Options** button and then click the appropriate option to edit its value. The options are initialized with their default values.



Editing Knowledge Base Options

2. Enter the new option value and click the **Save** button.

End

Editing a Knowledge Base Definition Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application

Start

1. Select a knowledge base from the list.

Purge All ase Name Knowledge Center FAQ	Knowledge_Sp	bace			$\langle \rangle$		Knowled	dge Center	FAQ	< ×
ase Name ase Name enter FAQ Description Knowledge base for basic Knowledge Center FAQ Languages * English, default *** ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields	Q Quick Filter		+	O				Delete	Purge	Options
Ase Name Inter FAQ I				Pu	rge All					Â
enter FAQ Description Knowledge base for basic Knowledge Center FAQ Languages * English, default Knowledge base is active Knowledge base is active Knowledge base is public Custom Fields	D	Knowledge Ba	ase Name					o Contor EAO		0
Knowledge base for basic Knowledge Center FAQ Languages * English, default Knowledge base is active Knowledge base is active Knowledge base is public Custom Fields	nowledgeFAQ	Knowledge Ce	enter FAO							-
Languages * English, default Knowledge base is active Knowledge base is public Custom Fields	nomeager Aq	Nilo medge oe					· · ·		Knowledge Cen	
English, default English, default Knowledge base is active Knowledge base is public Custom Fields										
 ★ ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields ● 										0
 ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields 							English, de	efault		
 Knowledge base is active Knowledge base is public Custom Fields 						::				
 Knowledge base is active Knowledge base is public Custom Fields 										
 ✓ Knowledge base is public Custom Fields 										+
Custom Fields							✓ Knowle	dge base is acti	ve	
									lic	
No items								elds		0
							No items			
							No items			

Editing Knowledge Base Definition

2. Edit the knowledge base definition and click the **Save** button.

End

Deleting a Knowledge Base Definition Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application
- You must have created a knowledge base definition

Start

- 1. Select a knowledge base from the list.
- 2. Press the **Delete** button and confirm the action.

End

Purging Knowledge Bases Prerequisites

- The Administrator user must have Knowledge.ADMINISTER privileges
- You must create and select a GKC Cluster application

Start

1. To purge a particular knowledge base, select it from the list, press the **Purge** button, and confirm the action.

Knowledge Center FAQ < × Delete Purge Options	
Name *	
Purge knowledge base	×
Are you sure you want to purge 'knowledgeFAQ' knowledge base?	×
 Ok Cancel	
+ Knowledge base is active Knowledge base is public Custom Fields Custom filed for Knolwedge Base (custom_string, string) 	
+	

Purging a Knowledge Base

2. To purge all knowledge bases, use the **Purge All** button.

End

Installing the Pulse Plugin

The Genesys Knowledge Center Plugin for Pulse provides access to GKC Server statistics such as KPI, user activity, trending topics, like and dislike trends, and activity types.

Install Genesys Knowledge Center Plugin for Pulse

Prerequisites

· Genesys Knowledge Center Server must be installed on the host

Windows Installation Procedure Start

1. In your installation package, locate and double-click the **setup.exe** file. Install Shield opens its welcome screen.



Pulse Plugin Install Shield Window

2. Click Next. The Select Installed Application screen appears.

nesys Installation Wizard	×
Select Installed Application	
	list of application installed on target computer. ys Knowledge Center Plugin for Pulse components into sted location
Knowledge Center Server	
Application Properties:	
Installation Package Name: Knowledge Cen Version: 8.5.000.14, Build 3	iter Server
Install Location: C:\Program Files\GCTI\Kno	wiedge Center Server\Knowledge_Center_Server_
Configuration Server: gks-dep-stbl.emea.int.g Application Name in Config Server: Knowled	
•	
	< Back Next > Cancel

Select Installed Application

- Select the Knowledge Center Server Application for which you want to install the plugin. 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.
- 4. Click Next. The Ready to Install screen appears.

Genesys Installation Wizard		×
Ready to Install		
Genesys Installation Wizard has collected all req Knowledge Center Plugin for Pulse on your com		
To install Genesys Knowledge Center Plugin for To review settings, click Back. To exit the Wiza		
	< Back Install Cancel	

Ready to Install screen

- 5. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for Backend Server. When it has finished, the **Installation Complete** screen appears.
- 6. Click **Finish** to complete your installation.
- 7. Inspect the directory tree of your system to make sure that the following files have been installed in the location that you intended.
 - GKSserverfolder\server\webapps\gkc-dashboard.war
 - GKSserverfolder\server\webapps\gkc-kpi.war

End

Linux Installation Procedure

Start

- 1. Open a terminal in the directory for the Genesys Knowledge Center Plugin for Pulse IP.
- 2. Run the install.sh file. The Genesys installation starts.
- Enter the full path to your plugin installation directory and confirm that it is correctly specified.
- 4. If the installation is successful, the console displays the following message: Installation of Genesys Knowledge Center Plugin for Administrator, version 8.5.x has completed successfully.
- 5. Inspect your system directory tree to make sure that the files have been installed in the location that you intended, as shown here:
 - \webapps\gkc-dashboard.war
 - \webapps\gkc-kpi.war

End

Configure Genesys Knowledge Center Plugin for Pulse

Start

- 1. Log into Genesys Administrator.
- 2. Go to Dashboard > Pulse.



Selecting the Pulse Dashboard options in Genesys Administrator

- 3. Click Add a Widget.
- 4. Select the **IFrame** widget type.

GAX Dashbaard Agents Configuration Administration Users System :: GKC :: + -			
скс			
knowledgeFAQ			
Search	Add a Widget		×
Feedbacks	Choose a Widget Template		Q Filter Widgets
Deflection			
Average Confidence			
Sertment	eServices Queue KPIs A queue report presenting an overview of current or mar real- time acting for eServices channels.	IFrame	00:43
	IWD Agent Activity	IWD Queue Activity	
	A report presenting agent or	A queue report presenting an	
 Add a Widget	🕒 New Template 🥒 Edit 📴 Clone 📋 Delete		Next Cancel
+			

Adding a Pulse iFrame widget

Set the name of t	he widget.
Add a Widget	×
Display Options	
Widget Title *	Widget Preview
IFRAME	
	A i
Size 1 × X 2 ×	IFRAME
Allow resize	Complete URL by hitting Enter or moving to another field.
Widget refresh rate	
60 seconds v	
Dashboard Widget URL	
http://example/	
~	
	Previous Finish Cancel

Setting the Pulse widget options

- 6. Set the widget URL to: http://host of GKC node with installed plugin:port of GKC node/gkc-kpi/#/kb/knowledge base name/lang/en
- 7. Set the Maximized widget URL to: http://host of GKC node with installed plugin:port of GKC node/gkc-dashboard/#/dashboard/file/default.json
- 8. Click Finish.

en Koonledge 7.60 +																								
vledge FAQ																								
nowledge Center																,	64,20152130	45107481,20	1512(0)48 -	bashed every	in • 0	, .	• 0	4
Filming C 🗶																								
y Trend 0	= x Events Over Time																							0 = 3
8.33% (ALL) • 12% (SEARCH)	Veen 🔰 🍕 Jasen Dal.)																							
0% (CPEN)	50 I																							
7 /0 (OPEN)	20																							
	22.00 30.00 32.00	14:00 16	0 06.00	10.00	1208 1408	16.00	18.00	28.00 22	00 00:00	02:00	04.03 08	01 08	00 1100	12.00	14:00 1	00 18:00	20.00	22.00	00.00	02.00	04.00	08.00 081	00 10	00 12.0
	02.06 02.07 03.07	13-07 13			10-07 02-07				07 02-08	02-08	02-08 02					08 02-08		02-08				22.09 02.0		
y Trend O o	- × Mean Confidence																							0 -
.33% (ALL)	Veen > Q. Zoom Out																							
2% (SEARCH)	1.00	_	_			-																		
1% (OPEN)	130																							
(urch)	E-00 22:30 00:30 02:08		00 38.00		12.00 14.00		18:00	2000 1	100 00:00	02:00	04.00 DA	00 08	100 1000	12:00		600 1800		22:00				06:00 081		00 12
	12/06 12/07 02/07	02-07 02	07 22.07	02-07	12-67 22-67	02-07	02.07	22.07	107 02-08	02-08	22.68 83	00 01	2.08 22.08	22.08	02.08 0	2.08 02.08	62-08	62-08	22.09	22.09	02.05	02-09 22-	09 02	00 0
	0 = ×	Sentiment		Mar I				0 = ×	Languag	•					٥	- × - K	nowledge B	lase						
	Q = x	Sentiment		T I I				0 = x	Languag	•					0	= x K	nowledge B	854						
TTORNE T		Sentiment	0 = ×	199.92 795 Top 10.0				0 = x	Languag	•				Tep 10 L			nowledge B	iase		Lunda 190			•	¢ =
TTERET JY JY JY		Sentiment		Top 10 1 Tem	Documents			0 = ×	Languag	÷		Cust		Top 10 L		= x K	nowledge B	iase						0 = : 0 = : Action
D Categoriss		surt AO	ion	Tem		iiiy 10 2 104			Languag	•				Term	Jked	publity to a cu							Count	0 =
C Categorius es kondegi Gater Inner		surt Art Q	ion Ø	Term How can i					Languag	•		Count	Action	Term How can I	iked add search o						WARE A		Court	0 = : Action
C Categories		writ da Q Q	60 0	Term How can I Where doe	add search capab	he articles?	om agent desist		Languag	•		Court 4	Action Q, Ø	Term How can I Where doe	Joed add search o	pability to a cu	torn agert des	átop?			yr AG		Court	© = Action Q, ©
C Dregories a Revealed port from - Constraints of the Total		aant ka q q q	601 0 0	Term How can I Where doe What repo	add search capab eo the CMS store t	he articles) able in Pulse p	om agent doubt	cq2	Languag	•		Count 4 2	Action Q Ø Q Ø	Term How can I Where doo	liced add search o is the CME sh assign Garee	pability to a cu	torn agent des	iesp?		Lunded 120	Mar and a state of the state of		Court 4	¢ = Action Q ©
C Dregories a Revealed port from - Constraints of the Total		ant ho Q Q Q Q	60 0 0	Term How can I Where dos What repo	i add search capab es the CMS store t orting data is availa	he articles? able in Pulse p	om agent disid olugin3 o anovers are 1	ap?	Languag	•		Count 4 2 2	Action Q @ Q @ Q @	Term How can I How can I What is th	Joed add search o a the CMEs at assign Carnes e difference to	pability to a cu on the articles? ys Knowledge C	ttern agent des anter Plugica ti	átop? o my agenta? Kitováledge b		Lunda 120	New York		Court 4	© = Action Q, © Q, ©
Craspins Results for the second point the		unt ho Q Q Q Q Q Q	0 0 0 0	Term How can I Where dos What repo How can I How can I	add seanth capab es the CMS store t riting data is availa proactively offer a	he articles? able in Pulse p a chat when n inowledge Cer	om agent diolid olugin? o anovetrs are f	op? ound? Ty agenta?	Languag	•		Court 4 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Action Q 0 Q 0 Q 0 Q 0	Term How can I Where doe How can I What is the	Joed add search o a the CMS sh assign Canes e difference b tachyrents a	çability to a cu os the articles? ys Knowledge C	tom agent des enter Plugins t ge Cluster and	idtop? o my agenta? Knowledge b wers?			y date		Court 4 2 2 1 1 1	¢ = Action Q 0 Q 0 Q 0
C Cargories C Car		السنة المن م م م م م م م	60 00 00 00	Term How can I Where dos What repo How can I How can I Con I use	I add search capab eo the CMS store t string data is availa I proactively offer a I assign Genezys K	he articlec? able in Pulse p a chat when n Inowledge Cer pe Center as a	om agent deskt olugien? o answers are 1 ther Plugnes to a virtual assista	op? ound? Ty agenta?	Languag	•		Count 4 2 2 2 2 2 2		Term How can I When doe How can I What is th How the a How can I	Jked add search o a the CME at antige Gener e dffarence b tachreets a set access o	pability to a cu on the articles? ys Knowledge C thween Knowledge e used in findin	tom agent des enter Plugins t ge Cluster and githe right ans inisitators an	ktop? o my squets? Ktooledge b wets? d managers?		Lunda			Count 4 2 2 2 1 2 2 1 2 2 2 2 2 2 2 2 2 2 2 2	¢ = 4.000 4.00
12 10 Categories 10		۵۵۲ ۵۵ ۵ ۹ ۹ ۹ ۹ ۹ ۹	60 0 0 0 0	Term How can I Where do What repo How can I How can I Can I use	add search capab eo the CMS store t oting data is availa proactively offer a actign Genetys H Genetys Hrowledg	he articles? able in Pulse p a chat when n inowledge Cen ge Center as a the knowledge	om agent deskt oksjin? o answers are 1 mer Plagna to r virtaal asolota e bass?	opi bundi Ty agentai rel		e		Court 4 2 2 2 2 2 2 2	Action Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0	Term How can I Where doe How can I What is th How can I How can I	Joed add search o a the Chill at ansign Caneo a difference b machiments a set access or preactively of	pability to a cue es the articles? ys Knowledge C thwan Knowled e used in findin retrol for my adt	tors agent dea enter Plugins t ge Cluster and gifte right anso inisitations an no answers an	ktop? o my agenta? Khowledge b wess? d managens? s found?		Lundid	yra a		Coart 4 4 2 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	\$ = Artion Q & Q & Q & Q & Q & Q & Q & Q & Q & Q &

Pulse Dashboard Widget

You have successfully added a widget for accessing GKC statistics.

End

GKC Pulse Plugin Configuration Options

You can customize the KPI widget by adding the bolded parameters to the URL:

http://host of GKC node with installed plugin:port of GKC node/gkc-kpi/#/kb/knowledge base name/lang/en?timeframe=select timeframe

- /kb/knowledge base name—Set the appropriate knowledge base name
- /lang/en—Choose Knowledge Base's Language representation
- timeframe=select timeframe—Select KPI's timeframe, for example now-1M

Installing the Workspace Desktop Edition Plugin

Installing the Plugin for Workspace Desktop Edition

Agents can use the GKC Plugin for Workspace Desktop Edition (WDE) to access knowledge-related information right from their desktop. For example, if a customer asks a question using a chat widget and the corresponding interaction is routed to an agent, GKC can execute a pre-populated search based on data attached to the new interaction, as well as displaying the customer's search history and providing the agent with full access to the knowledge base access. And if the customer has not authorized during their search, the agent can link their session history to that customer's ID to access their full history while working with the interaction.

To use this plugin, complete the following procedures:

- 1. Installing the Plugin for Workspace Desktop Edition
- 2. Configuring the WDE Application to work with the WDE Plugin
- 3. Providing Knowledge Center Access to Agents

Installing the Plugin for Workspace Desktop Edition

Prerequisites

Workspace Desktop Edition must be installed and configured to work with voice or media interactions.

Start

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

Genesys Installation Wizard	I 🛛 🔀
	Welcome to the Installation of Genesys Knowledge Center Plugin for Workspace Desktop Edition, version 8.5.000.13.
	Genesys Knowledge Center Plugin for Workspace Desktop Edition provides agents with access to knowledge events (searches, article views and feedback) related to the current customer and also allows them to search the knowledge base right from their desktop.
	The Genesys Installation Wizard will install Genesys Knowledge Center Plugin for Workspace Desktop Edition on your computer.
Senesys ⁻	To continue, click Next. To exit the Wizard, click Cancel.
About	Next > Cancel

GKC WDE Plugin—Install Shield Screen

- 2. Click Next. The Select Installed Application screen appears.
- Select the installed Workspace Desktop Edition Application for which you want to install the plugin. 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.

nesys Installation Wizard
Select Installed Application
Select Workspace Desktop Edition IP from the list of application installed on target computer. Genesys Installation Wizard will install Genesys Knowledge Center Plugin for Workspace Desktop Edition components in the selected Workspace Desktop Edition's location
Workspace Desktop Edition
Application Properties:
Installation Package Name: Workspace Desktop Edition Version: 8.5.103.07, Build 1 Install Location: C:\Program Files\GCTI\Workspace Desktop Edition
۲
< Back Next > Cancel

Select Installed Workspace Desktop Edition Application

4. Click Next. The Ready to Install screen appears.

Genesys Installation Wizard	×
Ready to Install	
Genesys Installation Wizard has collected all required information and is ready to install Genesys Knowledge Center Plugin for Workspace Desktop Edition on your computer.	
To install Genesys Knowledge Center Plugin for Workspace Desktop Edition, click Install. To review settings, click Back. To exit the Wizard, click Cancel.	
< Back Install Cancel	J

GKC WDE Plugin—Ready to Install

5. Click **Install**. The Genesys Installation Wizard indicates it is performing the requested operation for Backend Server. When through, the **Installation Complete** screen appears.

Genesys Installation Wizard	I
	Installation Complete
	The Genesys Installation Wizard has successfully installed Genesys Knowledge Center Plugin for Workspace Desktop Edition, version 8.5.000.13, on your computer.
Senesys ⁻	To exit the Wizard, click Finish.
	Finish

GKC WDE Plugin—Installation Complete

- 6. Click **Finish** to complete your installation.
- 7. Inspect the directory tree of your system to make sure that the following files have been installed in the location that you intended:
 - GWEInstallationFolder\Genesyslab.Desktop.Modules.Knowledge.dll
 - GWEInstallationFolder\ Genesyslab.Desktop.Modules.Knowledge.module-config
 - GWEInstallationFolder\Genesyslab.Desktop.Modules.Knowledge.pdb
 - GWEInstallationFolder\Newtonsoft.Json.dll
 - GWEInstallationFolder\RestSharp.dll
 - GWEInstallationFolder\System.Net.Http.Formatting.dll
 - GWEInstallationFolder\Language\ Genesyslab.Desktop.Modules.Knowledge.en-US.xml

End

Configuring the WDE Application to work with the WDE Plugin

Add the GKC Cluster to Your WDE Connections

- If your Workspace Desktop Edition application form is not open in Genesys Administrator, navigate to **Provisioning > Environment > Applications**. Select the application defined for the Workspace Desktop Edition and click **Edit...**.
- 2. In the **Connections** section of the **Configuration** tab, click **Add**. The **Browse for applications** panel opens. Select the **Knowledge Center Cluster application**, then click **OK**.

Genesys	Genesys Adr	ministrator							Tenant: Environment	P New	Window Log out 🔘 + 🚳 -
MONITORING PROVISIONING											
ROVISIONING > Environment > /	Applications > Workspace De	sktop Edition 851									
Ravigation 《	📰 Workspace Desktop Er	dition 851 - \Applications\Multime	edia\								
Search 💿	X Cancel 😡 Save & Close	Save 🖉 Save & New 🛛 😫 Reload	🛙 📫 Start 🛄 Stop 📑 Graceful :								
a Environment 📃	Configuration Opt										
Alarm Conditions	-(+)* General		Browse					×			
🙀 Scripts	* Name:	Workspace Desktop Edition 851	Instructions: Set	ect application(s) to be added to	the connection list						
Application Templates	* Application Template:	Workspace Desktop Edition 85	-								P
Applications	* Type:	Interaction Workspace	Applications								
Hosts			💼 • 🔳 New 🚱 New Fo	lder							
Solutions			Name	Туре	Version	Server	State				
Time Zones	State:		T Effer	Filter	Filter	Filter	Effer				
Business Units/Sites		🗑 Enabled		akations > 🛅 Knowledge							
Tenants	Connections:	Add DEdit Remove	D P				Enabled				
Table Access Points		Server 🔺	Cthers				Enabled		Trace Mode		
Formats		INX	Knolwdge Center Cluster	Application Cluster	8.5.0	True	Enabled		[Unknown Trace Mode]		
			Knolwedge CMS Knolwedge Center Serve	Genesys Knowledge Cent. Genesys Knowledge Ce.		True	Enabled Enabled		[Unknown Trace Mode] [Unknown Trace Mode]		
🙀 Fields			 Knowedge Center Serve 	Genesys Knoweedge Ce	. 65.0	True	Ensoed		[Unknown Trace wode]		
			14 4 Page 1 073 1	× N @			Displaying objects 1 OR CR				

GKC WDE Plugin—Browse for applications 1

Configuration	Options	Permissions	Dependencies	Alarms	Logs				
🔺 * General									
* Name:	Workspace De	esktop Edition 851							
* Application Templat	Workspace D	esktop Edition 851							Q ×
* Type:	Interaction W	orkspace							~
Version:	8.5.1								
Server:	True T								
State:	Enabled								
Connections:	T Add 🎲 Ed	lit 🙀 Remove							
	Server 🔺		Connect	ion Protocol	U	cal Timeout	Remote Timeout	Trace Mode	
	INX				0		0	[Unknown Trace Mode]	
	Knolwdge Cen	ter Cluster			0		0	[Unknown Trace Mode]	
					0		0	[Unknown Trace Mode]	
	UCS								

GKC WDE Plugin—Browse for applications 2

Add GKC Options to Your WDE Application

To use the GKC Plugin for WDE, you need to add some options to your WDE application so that it can gather knowledge-related information from incoming interactions. You can add these options to the the **interaction-workspace** section of the WDE application.

Start

1. Import the template with the additional options:

- 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. Choose the application template (APD) file from the import window and click **Add**.
- 5. Browse to the *Knowledge_Center_WDE_Plugin_850.apd* file available in the templates directory of your installation CD. The **New Application Template** panel opens.

	Genesys A	aminisirai	101																																				mane	: [EI	WINDO	ing.			2	Ne	ww	n00%	 29 OU	χ.	w		
HONITORING PROVISIONING	OPERATIONS				-	_	_		a,	ł	ł																											-		-					-								ł
PROVISIONING > Environment > A	pplication Templates > N	iew Application Temp	plate							_	_																																_	_									ľ
Navigation (4)	T Knowledge_Cente	r_WDE_Plugin_85	- \Application Templa	tes\																																																	
🤪 Search 🔹	🗶 Cancel 🛃 Save & Cl	lose 🔒 Save 🛃 Save 8	& New 🛛 😹 Reload 🛛 🧃	Import Metadata																																																	
😹 Environment 📃	Configuration	Options	Permissiona	Dependencies																																																	
Alarm Conditions																																																					
🙀 Scripts	* Name:	Knowledge_Ce	anter_WDE_Plugin_851	1																																																	
Application Templates	* Type:	Interaction Wo	orkspace																																												`	•					
Applications	* Version:	8.5.0																																																			
🕞 Hosts	Metadata:																																																				
Solutions	Metadata Description																																																				
🕞 Time Zones	Metadata Version:																																																				
Business Units/Sites	State:	Enabled																																																			
Tenants																																																					
Table Access Points																																																					
Formats																																																					
🕞 Fields																																																					
-																														4																							

GKC WDE Plugin—New Application Template panel

6. Click Save and Close

2. Open the **Options** tab of the uploaded application and review the new options.

New 🙀 Delete 👲 Export 🐺 Import			View: Advanced View (Options)
Name +	Section	Option	Value
Filter	Filter	Filter	Filter
interaction-workspace (4 Items)			
interaction-workspace(gk.c.ustomer	interaction-workspace	gks.sustomer	EmailAddress
	Interaction-workspace Interaction-workspace	gkc.customer gkc.kbid	Ernoll-Address gks_Jbid
Interaction-workspacie/gkc.customer		gke.kbid	

GKC WDE Plugin—Options tab of uploaded application

- 3. Navigate to **Provisioning > Environment > Applications**. Select the application defined for Workspace Desktop Edition and click **Edit...**.
- 4. Open the **Options** tab.
- 5. Add the plugin options to the interaction-workspace section using the New button.

New Option		×
Location:	Options 👻	
Section:	interaction-workspace	
Name:	gkc.customer	
Value:	EmailAddress	5
		5
	interaction-workspace OK Cancel	=
	interaction-workspace	acces

GKC WDE Plugin—Add plugin options

End

The GKC Plugin for WDE uses the following additional options:

- **gkc.question**—This key points to the customer's question for the pre-populated search and is stored in the interaction's user data
- **gkc.kbid**—This key points to the knowledge base ID for the pre-populated search and is stored in the interaction's user data
- **gkc.customer**—This key points to the *customerld* in the interaction's user data (the default value for this key is the customer's email address)
- · gkc.session—This key stores the session ID in the interaction's user data

Providing Knowledge Center Access to Agents

Genesys Knowledge Center supports the following privilege in order to restrict Agent access:

Knowledge.WORKER—Enables access to the Genesys Knowledge Center tab in WDE

To configure the appropriate role for an agent:

Start

- 1. Go to **Provisioning > Environment > Application Templates**.
- 2. Select the application template defined for Workspace Desktop Edition and click **Edit...**.
- 3. Click Import Metadata.
- 4. Click Add and select the *Knowledge_Center_WDE_Plugin_850.xml* file.
- 5. Click Open.
- 6. Information from the metadata file will be added to the template and the appropriate privilege will be added into the framework.
- 7. Save and Close.
- 8. Go to **Provisioning > Accounts > Roles**.
- 9. In the taskbar click **New** to create a new object.
- 10. Set the name of the role in the **General** section.

Configuration	Role Privileges	Permissions						
								General Member
🔺 * General								
* Name:	WDE GKC wor	rker						
Description:								
* Name: Description: Tenant: State:	Environment						× P	
State:	Enabled							
Members								

GKC WDE Plugin—Set Role Names

- 11. Go to the **Role Privileges** tab, and select the set of roles for Genesys Knowledge Center.
- 12. Open the WDE GKC Plugin privileges list and select the **Genesys Knowledge Center Privileges** section.
- 13. Create the appropriate privileges as allowed.

a sea defense de sea		
2		
and a stand of the		
9 4	14	
a second processing and second and		
The Allowing States	al a l	

GKC WDE Plugin—Create Privileges

- 14. Go back to the **Configuration** tab.
- 15. Add the appropriate Agent or Agent Group to the **Members** section by clicking the **Add** button.

_						
Users: TAdd 😳 Edit 🙀 Remove						
	User Name 🔺	Agent	Last Name	First Name	Employee ID	State
	default	False	default	default	0	Enabled
Access Groups:	🖬 Add 🌼 Edit 🙀 Remove					
	Name 🔺		Туре		State	
	Administrators		Administrators		Enabled	
	Access Groups:	Ucer Name A default Access Groups: Access Groups:	Access Groups: Access	Less Ware A Agent Last Name default False default Access Groups: Image: Add memory Type	Access Groups: Cast Name First Name Access Groups:	Access Groups: Agent Last Name First Name Employee ID default False default default 0 Access Groups: It Add @ctatt isg Remove Type State

GKC WDE Plugin-Members Section

16. Save and Close.

End

Importing Data Into the Knowledge Base

You can use the Import Tool to add sample QNA data to your knowledge base. This tool is located in the *./server/tools* directory in the GKC installation folder. It comes with the following resources:

- knowledgeFAQ.xml—List of basic QNA data, provided with the GKC Server indexing tool
- gks-indexer-tool.jar—Java-based indexing tool
- importFAQ.bat—Simple data import script

Data Import Syntax

Use the following syntax to import data:

```
- java -jar gks-indexer-tool.jar
--host <GKC server node URL>
--file <path to XML data or folder that contains it>
--user <authorized user>
--authorization "username:password"
```

The authorization parameter is only required if you have enabled the security option for GKC Cluster.

Sample Import Script

Here is an example of what your import script might look like:

```
java -jar <Path to GKC Server>\GKC_Server\server\tools\
gks-indexer-tool.jar
--host "http://sample.com:9001/gks-server"
--file "<Path to GKC
Server>\GKC_Server\server\tools\knowledgeFAQ.xml"
--user "gkc admin"
```

If it works, this script will import sample QNA data into the knowledge base.

Sample QNA Data

Here is an example of the data stored in the XML file:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<documents kbsId="knowledgeFAQ" lang="en">
    <document>
        <question>What Is Knowledge Center?</question>
        <answer>The Genesys Knowledge Center ultimate goal is to
convert
your knowledge into the answers on the question your clients or
agents have.
It delivers set of the component for administration, authoring and
using the
knowledge. The heart of the system is the Knowledge Center Server
that
aimed to find the best answer on the question you have
asked.</answer>
        <categories>
            <category>
                <name>General</name>
            </category>
        </categories>
    </document>
</documents>
```

Sizing

Important

The exact deployment architecture and solution size will vary depending on your hardware and your ability to fine-tune the deployed system to get the

best performance on your equipment and with your particular user load. However, the following estimates may give you some basic ideas on how to size your deployment.

Hardware Sizing Information

Genesys Knowledge Center Server

	Minimal	Recommended				
CPU	Μ	ulticore (8+)				
RAM	8GB	16GB				
	100GB or	100GB or more, depending on				

Disk Space the number of knowledge bases and the depth of the history

Genesys Knowledge Center CMS

	Minimal	Recommended		
CPU	Μι	ulticore (8+)		
RAM	8GB	16GB		
	10GB or n	nore, depending on		
Disk Space	the number of knowledge bases			

Recommended Software Configuration

- **OS version**—Linux 6 x64 or higher, Windows Server 2008R2 x64 or higher
- Java version—Java version 1.7 or higher, 64-Bit Server VM

Java Options	Initial heap size (Xms)	Maximum heap size (Xmx)
Genesys Knowledge Center Server (without archiving)	4096m	4096m
Genesys Knowledge Center Server (with archiving)	4096m	8192m
Genesys Knowledge Center CMS	1024m	1024m