

Genesys Knowledge Center Deployment Guide

Knowledge Center 8.5.0

2/23/2015

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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:

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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.

⊖ Genesys • Workspace		⊘ gks_super + 👲 + 🛛 _ □
🛞 🚺 John Smith 💽 00:00:13 🐺 🛒 🐂 🕶	<u>&</u> -	:
Case Information	0	Search History
Origin: Inbound chat	ŝ	Venedelar kees
- John Smith O Connected	TAC	groupon * Categories
[5:04:06 PM] New party 'John Smith' has joined the		De Leed te pru a tire in the rectaurant?
[5:04:16 PM] New party 'gks_super' has joined the session		Using a Groupon Buying Gifts
		Do I need to call to confirm the restaurant reservation I made using Groupon Reserve? Booking trips Ticketed events
	2	Do I need to call to confirm the restaurant reservation I made using Groupon Reserve? Using a Groupon
		Do I need to call to confirm the restaurant reservation I made using Groupon Reserve? Restaurant reservations Buying
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	CENT	Custom fields filters
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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.

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MONITORING PROVISIONING	OPERATIONS							
PROVISIONING > Environment > A	pplication Templates > New A	Application Template						
Navigation «	T Knowledge_Center_Ch	uster_850 - \Application Template	s\Knowledge\					
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😝 Environment 📃	Configuration Opti	ions Permissions	Dependencies					
Alarm Conditions								
🕞 Scripts	* Name:	Knowledge_Center_Cluster_850						J
Application Templates	* Type:	Application Cluster					~	
Applications	* Version:	8.5.0						
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Business Units/Sites	State:	Enabled						
🕞 Tenants								
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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.
- 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.

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Application Templates				
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Name 🔺	Туре	Version	State	
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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.

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PROVISIONING > Environment > /	Applications > Knolwdge	e Center Cluster									
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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
Select Listening Mode:	Unsecured
Description:	

GKC Cluster Port Information

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

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E Server mit							
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	Name 🔺				State		
	No objects to	display					
* Host:	gkc-host					ې ×	
* Listening Ports:	🔳 Add 🍥 Ed	lit 🙀 Remove					
	ID 🔺				Port		
	default				8443		
* Working Directory	c .						
* Command Line:							
Command Line Arguments:							
* Startup Timeout:	90						
* Shutdown Timeou	it: 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 Accounts		a On Account]					

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.

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🙀 Scripts	* Name:	Knowledge_Cen	ter_Server_850				
Application Templates	* Type:	Genesys Knowel	edge Center Server			~	
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 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.

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	Name 🔺	Туре	Version	State
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	Others			Enabled
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14	🖣 🛛 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>akc 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.

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Alarm Conditions									General Server Info	Network Security
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Application Templates	* Name:	Knowledge Ce	odge Center Server							
Applications	* Application Template:	Knowledge Ce	vledge Center Server 850 new × P							
Hosts	* Type:	Genesys Know	sys Knoweledge Center Server							
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Tenants	Connections:	🖬 Add 🍥 Edi	t 🙀 Remove							
Table Access Points		Server 🔺	c	onnection Protocol	Local Timeour		Remote Timeout	Trace Mode		
🕞 Formats		No objects to 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			
A Server Info						General	Server Info	Network Securi
Toponto								
renancs.	Add 👷 Ed	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				
□ □ Ilser ────				
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	cations for target computer our system administrator.	r. If application that you
Knowledge_Center_Server_850		
Application Proportion:		
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 Ce	nter 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				
	< 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	he list of Sun's Java De will be updated based (velopment Kit (JDK) on your selection.	
Sun's Java Development Kit (JDK) 1.7.0_45			
Sun's Java Development Kit (JDK) prop	erties:		
Version: 1.7.0	ciuca.		
Location: C:\Program Files\Java\jdk1.7.0_45			*
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				
Thew Rev Report The Information State Stat										
Name 🔺				Section		Option		Value		
T	Filter				Filter		Filter		Filter	
	∃ general (1 Rem)									
	Time to live for sessi	ion			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		
∃ reporting (1 Rem)										
Time to live				reporting		tti		14d		
Security (3 Items)										
	Authorization				security		auth-scheme		none	Ĺ
	Password				security		password			
	User ID				security		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

Configuration	Options	Permissions	Dependencies	Alarms	Logs					
📄 New 📷 Delete 👲	🖻 New 🙀 Delete 👲 Export 🗛 Import									
Name 🔺	Name 🔺				Option	Option		Value		
Tilter	Y Filter				Filter	Filter		Filter		
E archiving (4 Itens)										
Archive Type			4	archiving		type		tar		
Enable archiving fun	ctionality	4	archiving		enabled					
Local path archives	stored in	4	archiving		path					
archiving/archiving				archiving		archiving		true		
∃ log (6 Items)										
log/all			1	og	all			stdout, log_node.log		
log/expire	log/expire				expire	expire		20		
log/segment				log		segment		10000		
log/standard			log		standard					
log/trace			log		trace					
log/verbose			1	og	verbos	se		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

Default Value: 3

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.

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

Access Groups:

- 1. Go to **Provisioning > Accounts > Roles**.
- 2. In the taskbar, click New to create a new object.

3.	Set the n	ame of	the role in	the Gen	eral sect	ion.		
Configuration	Role Privileges Permi	ssions						
General								Gene
* Name:	knowledge_manager							
Description:	Role for manage Know	ledge Center						
Tenant:	Environment						× P	
State:	Enabled							
Members								
Users:	📻 Add 🎲 Edit 🙀 Re	move						
	User Name 🔺	Agent	Last Name	First Name	Employee ID	State		
	March Sector Resultanting							

GKC Server Access Roles

🖬 Add 🎡 Edit 🙀 Remove

Name 🔺

- 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.

Туре

6. Set the appropriate privileges to **Allowed**.

	· · · ·			
Configuration Role Pr	rivileges Permissions			
🛅 Allow All 👲 Export 🚡 Impor	t		View privileges: All	✓ #
Configuration Role Privileges Permissions I Allow All Eport Timport View privileges Add/Remove Products Genesys Knowledge Center 8.5.000.00 Import Genesys Knowledge Center 8.5.000.00 Genesys Knowledge Center 8.5.000.00 Genesys Knowledge Center 8.5.000.00 Filter Filter Filter Genesys Knowledge Center 5.5.000 Filter Genesys Knowledge Center 6.5.000 Filter Genesys Knowledge Center 6.5.000 Filter Genesys Knowledge Center 6.5.000 Filter				
	Genesys Knowledge Center 8.5.000.00			
	Genesys Administrator	w.		
Name 🔺		 Value 		
Y Filter		Filter		
Genesys Knowledge Center	Server Privileges (3 Items)			
Allows agent to change data in	a knowledge base	Allowed		
Allows agent to manage knowle	edge bases	Allowed		
Allows agent to use reporting c	apabilities	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:	TAdd 🎡 Edit 🙀 Remove						
Access Groups:	User Name 🔺	Agent	Last Name	First Name	Employee ID	State	
	default	False	default	default	0	Enabled	
	EAdd 👷 Edit 🙀 Remove						
	Name 🔺		Туре		State		
	Administrators		Administrators Enabled				
	Access Groups:	Access Groups:	Access Groups: Add Categories Agent Access Groups: Access Groups: Add Categories Add Add Add Add Add Add Add Add Add Ad	Access Groups: Add Call and Ca	Access Groups: Type Administrators Administrators	Access Groups: Agent Last Name First Name Employee ID User Name A Agent Last Name First Name Employee ID Access Groups: Type Getaut Getaut O Access Groups: Type State Administrators Administrators Enabled	

GKC Server Members Section

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.

Senesys	Genesys Adr	ministrator		Tenant: Environment	P New Window Log out
MONITORING PROVISIONING	OPERATIONS				
PROVISIONING > Environment > A	pplication Templates > New /	Application Template			
Navigation	T Knowledge_Center_C	MS_850 - \Application Templates\GK	c/		
🙀 Search 🕢 🕒	🗙 Cancel 🛃 Save & Close	🛃 Save 🛃 Save & New 🛛 🔀 Reload 🛛 🧧	Import Metadata		
😝 Environment 📃	Configuration Opt	tions Permissions	Dependencies		
Alarm Conditions					
🕞 Scripts	* Name:	Knowledge_Center_CMS_850			
Application Templates	* Type:	Genesys Knowledge 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**.

	· · · · ·			<u>^</u>
	Instructions: Choose objects	from the list below.		
- n n	nlication Templates			
τ.	Vew 🚱 New Folder			đb
	Name 🔺	Туре	Version	State
7	Filter	Filter	Filter	Filter
Vie	w: 📻 Root > 🛅 Application Ten	nplates > 🛅 GKC	1	
6	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
M	I Page 1 of 1 ▷ ▷ □ 2	9 *		Displaying objects 1 - 4 of 4

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 🗸	

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	
* 10.	dofault	
* Port:	9000	
Connection Protocol:		~
HA sync:	True	
Select Listening Mode:	Unsecured	~
Description:		
		Cancal

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					
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			[
Select Application			
Select Application from the list of configured appl are trying to install is not in the list below contact	ications for ta your system a	rget computer. If a dministrator.	pplication that you
GKC_CMS_IP			
Application Properties: Type: Genesys Knowledge Center CMS (191)			A
Host: gks-dep-nghtly Working Directory: .			
Command Line: . Command Line Args: .			
T			Þ
	< 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	the list of Sun's Java Development Kit (JDK) will be updated based on your selection.	
Sun's Java Development Kit (IDK) 1 7 0 55		
Suns Sava Development Nit (SDK) 1.7.0_33		
Sun's Laus Douglooment Kit (IDK) aver		
Sun's Java Development Kit (JDK) prop Version: 1.7.0	perties:	
Sun's Java Development Kit (JDK) prop Version: 1.7.0 Patch Number: 55 Location: C:\Program Files\Java\jdk1.7.0_55	perties:	4
Sun's Java Development Kit (JDK) prog Version: 1.7.0 Patch Number: 55 Location: C:\Program Files\Java\jdk1.7.0_55	perties:	
Sun's Java Development Kit (JDK) prop Version: 1.7.0 Patch Number: 55 Location: C:\Program Files\Java\jdk1.7.0_55	perties:	
Sun's Java Development Kit (JDK) prop Version: 1.7.0 Patch Number: 55 Location: C:\Program Files\Java\jdk1.7.0_55	perties:	

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	٩	New Window	Log out 🛛 🗧	• 🔘 ا • 🍕
MONITORING PROVISION	ING	OPERATIONS									
PROVISIONING > Accounts >	> Role	s > New Role									
Navigation	~	- \Roles									
🙀 Search	۰	🔀 Cancel 🛃 Save & G	Close 🛃 Save 🛃 Save I	k New 🛛 😹 Reload 🛛 🄇	🕑 Vali	lidate Permissions					
Cap Environment	۰	Configuration	Role Privileges	Permissions							
iii Switching	۰									Genera	Member
Routing/eServices	۰	General									
ta Desktop	٠	* Name:	knowledge_cn	ns_manager							
🕞 Accounts	- 8	Description:	Role for CMS r	nanager							
🙀 Users		Tenant:	Environment						×	2	
🐻 Skills		State:	Enabled								
Galactic 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 Remove Roder Center 8 5 000 00 A 2 General Monade Center 8 5 000 00 General Monade Center 8 5 000 00	
Name A	Value
T 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.

	<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	sys Knowledge Center Plugin for Administrator in the and select another folder. ler, click Default.
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 required information and is ready to install Genesys Knowledge Center Plugin for Administrator on your computer.							
To install Genesys Knowledge Center Plugin for To review settings, click Back. To exit the Wiza	Administrator, click Install. ard, click Cancel.						
	< 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	je_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	ie		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 Ba	ase	< >
Q Quick Filter		+	0			Delete	Purge	Options
			Ρι	ırge All	ID *			0
D	Knowledg	je Base Nar	ne		knowled	lgeFAQ		
lo 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 *				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 ✓ Knowle Custom Fie	edge base is acti edge base is publ elds	ve lic	+	Minimum Value 1 Maximum Value 1000 Maximum Value Save Cancel	
string)	iea for knolweag	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.

Knowledge Center FAQ	< ×	English <
Delete Purge	Options	Language *
	^	English
Name *	0	✓ Set as default language
Knowledge Center FAQ		Knowledge base name
Description	0	Knowledge Center FAQ
Knowledge base for basic Knowledge Center	FAQ	Knowledge base description
anguages *	0	Knowledge base for basic Knowledge Center FAQ
English, default		Default filter conditions
		Noitems
Vanuladas bass is estiva	+	
Knowledge base is active		+
Custom Fields		Filter can consist of basic and custom fields of the knowledge article
No items		All filter criteria applied using AND logic (e.g. CreatedDate>2014-01-01 AND Segment=="VIP").
		Save Cancel
	+	

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.

Q Quick Filter + Purge All D Knowledge Base Name knowledge FAQ Knowledge Center FAQ Description English, default English, default + Knowledge base is active Knowledge base is active Knowledge base is public Custom Fields	(nowledge_Spa	ce			$\langle \rangle$		Knowled	lge Cente	r FAQ	<	×
Purge All ID Knowledge Base Name knowledge Center FAQ Name * Consumer FAQ Knowledge Center FAQ Description Consumer FAQ Implicit Consumer FAQ	Q Quick Filter		+	0				Delete	Purge	Option	S
ID Knowledge Base Name Knowledge Center FAQ Knowledge Center FAQ Languages * English, default Knowledge base is active Knowledge base is public Custom Fields No items				Pu	urge All						
knowledgeFAQ Knowledge Center FAQ Description Image: Center FAQ Languages * Image: Center FAQ English, default Image: Center FAQ *** Image: Center FAQ Knowledge base for basic Knowledge Center FAQ Image: Center FAQ Languages * Image: Center FAQ Image: Center FAQ Image: Center FAQ Languages * Image: Center FAQ Image: Center FAQ Image: Center FAQ Languages * Image: Center FAQ Image: Center FAQ Image: Center FAQ Languages * Image: Center FAQ Image: Center FAQ Image: Center FAQ	D	Knowled	lge Base Name	e			Name *	Contor EAO		U	
Knowledge base for basic Knowledge Center FAQ Languages * English, default + ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields No items	nowledgeFAO	Knowled	ae Center FAC)			Description	e center r Aq		A	
Languages * Languages * English, default + Knowledge base is active Knowledge base is public Custom Fields No items			<u>,</u>				Knowledge	e base for basi	c Knowledge Cer	nter FAQ	
 ★ ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields No items 							Languages English, de	* efault		0	
 ✓ Knowledge base is active ✓ Knowledge base is public Custom Fields No items 						0 0 0 0 0 0					
 Knowledge base is active Knowledge base is public Custom Fields No items 										+	
 Knowledge base is public Custom Fields No items 							✓ Knowle	dge base is ac	tive		
No items							 Knowle Custom Field 	dge base is pu Ids	blic	A	
							No items	145			

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	
Select Knowledge Center Server IP from the Genesys Installation Wizard will install Genesy the Genesys Knowledge Center Server selec	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_
Application Name in Config Server: Knowled	genesysiad.com Ige_Center_Server_850
•	

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	Genesys Installation Wizard has collected all required information and is ready to install Genesys Knowledge Center Plugin for Pulse on your computer.							
To install Genesys Knowledge Center Plugin for To review settings, click Back. To exit the Wiza	Pulse, click Install. rd, click Cancel.							
	< 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 Dashboard Agents Configuration Administration Users			
A System : GKC : +			
бкс			
knowledgeFAQ			
Search	Add a Widget		×
Feedbacks	Choose a Widget Template		Q Filter Widnets
Deflection			
Average Confidence			
Sentment	eServices Queue KPIs	IFrame	
	A queue report presenting an		
	overview of current or near real- time activity for eServices		
	COMPLEX.		00:43
	IWD Agent Activity	IWD Queue Activity	
	A report presenting agent or	A queue report presenting an	
	New Template		Next
Add a Widget			Current

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.

m Knowledge 7.60 +																								
vledge FAQ																								
nowledge Center																,	64,20152130	45107481,20	1512(0)48 -	bashed every	in • 0	, .	• 0	4
Theory C #																								
Trend 0	= x Events Over Time																							0 = 3
8 33%	Veen 🔰 🍕 Jasen Dal.)																							
0%	80 80																							
7 /0 (OPEN)	20																							
	10 0 22.00 00.00 02.00	M00 160	0 08.00	10.00	201 1408	14.00	18.00	21.00 2	00 00 00	02.00	0401 06	01 04	00 1200	12.00	1400 1	18.00	20.00	22.00	00.00	02.00	04.00	24.00 041	00 10	120
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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 Wind	low Log out 🔘 • 🔞 •
MONITORING PROVISIONING											
ROVISIONING > Environment > /	oplications > Workspace De	sktop Edition 851									
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GKC WDE Plugin—Browse for applications 1

Configuration	Options	Permissions	Dependencies	Alarms	Logs				
(*)* General									
* Name:	Workspace D	esktop Edition 851							
Application Temp	te: Workspace D	esktop Edition 851							×р
Type:	Interaction W	orkspace							~
/ersion:	8.5.1								
Server:	True								
State:	Enabled								
Connections:	T Add 🎲 Ei	dit 🙀 Remove							
	Server .		Connecti	ion Protocol	L.	ocal Timeout	Remote Timeout	Trace Mode	
					0		0	[Unknown Trace Mode]	
	INX								
	INX Knolwdge Cen	ter Cluster			0		0	[Unknown Trace Mode]	
	INX Knolwdge Cen UCS	ter Cluster			0		0	[Unknown Trace Mode] [Unknown Trace Mode]	

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.

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Application Templates	* Type:	Interaction Wo	orkspace																																															٣						
Applications	* Version:	8.5.0																																																						
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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 R Delete 2 Export & Import			Views Advanced View (Options)
Name A	Section	Option	Value
Y Filter	Filter	Filter	Filter
∃ interaction-workspace (4 Items)			
interaction-workspacelgks.customer	interaction-workspace	gkc.customer	EmailAddress
Interaction-workspacelgke.kbid	interaction-workspace	gke.kbid	gks_kbid
interaction-workspace/gkc.question	interaction-workspace	gkc.question	gks_question
interaction-workspace/gkc.session	interaction-workspace	gkc.session	gks_session

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
		S
	interaction-workspace OK Cancel	- as
	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 worker		
Description:			
Tenant:		Q ×	
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.

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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.

U	Isers:	🖬 Add 🎲 Edit 🙀 Remove					
Access Groups:		User Name 🔺	Agent	Last Name	First Name	Employee ID	State
		default	False	default	default	0	Enabled
	ccess Groups:	📰 Add 🎲 Edit 🎇 Remove					
		Name 🔺		Туре		State	
		Administrators		Administrators		Enabled	

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	Multicore (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	Multicore (8+)		
RAM	8GB	16GB	
	10GB or more, 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