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Workbench User's Guide

Pre - Installation Steps

5/3/2025

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Pre - Installation Steps

Genesys Engage Application Object Requirements

Workbench integrates to the Genesys Engage platform, as such the following Genesys Engage Objects will be required and leveraged by Workbench:

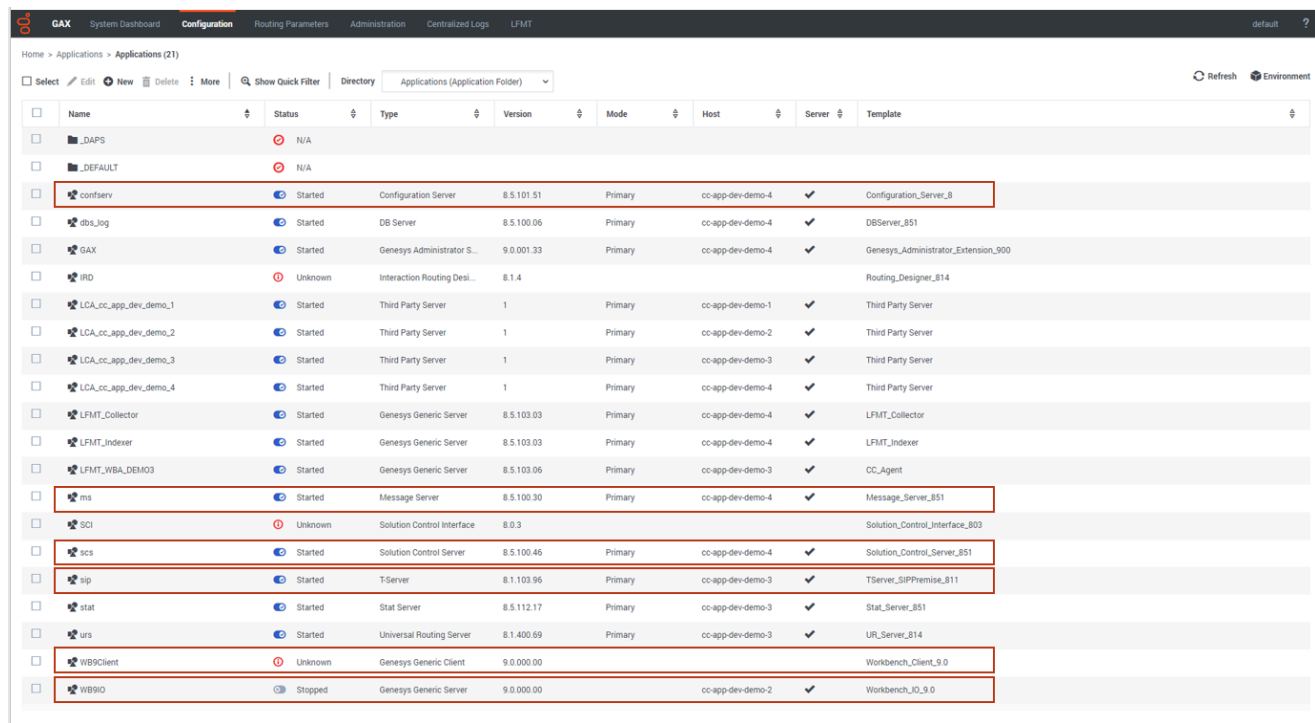
Component	Description/Comments
Genesys Engage Workbench Client application/object	enables Engage CME configured Users to log into Workbench
Genesys Engage Workbench IO (Server) application/object	enables integration from Workbench to the Engage CS, SCS and MS
Genesys Engage Configuration Server application/object	enables integration from Workbench to the Engage CS; authentication and Config Changes
Genesys Engage Solution Control Server application/object	enables integration from Workbench to the Engage SCS; Alarms to WB from SCS
Genesys Engage Message Server application/object	enables integration from Workbench to the Engage MS; Config change ChangedBy metadata
Genesys Engage SIP Server application/object (optional)	enables integration from Workbench to the Engage SIP Server enabling the Channel Monitoring feature *Workbench integrates to SIP Server only and <u>not</u> SIP Server Proxy

Warning

- Ensure each and every Engage CME Application has an assigned Template else the Workbench installation will fail.
- Ensure Engage CME Hosts Objects have an IP address assigned else the Workbench installation will fail.

Example CME objects:

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Name	Status	Type	Version	Mode	Host	Server	Template
_DAPS	N/A						
_DEFAULT	N/A						
confserv	Started	Configuration Server	8.5.101.51	Primary	cc-app-dev-demo-4	✓	Configuration_Server_8
dbis_log	Started	DB Server	8.5.100.06	Primary	cc-app-dev-demo-4	✓	DBServer_B51
GAX	Started	Genesys Administrator S...	9.0.001.33	Primary	cc-app-dev-demo-4	✓	Genesys_Administrator_Extension_900
IRD	Unknown	Interaction Routing Desl...	8.1.4				Routing_Designer_B14
LCA_cc_app_dev_demo_1	Started	Third Party Server	1	Primary	cc-app-dev-demo-1	✓	Third Party Server
LCA_cc_app_dev_demo_2	Started	Third Party Server	1	Primary	cc-app-dev-demo-2	✓	Third Party Server
LCA_cc_app_dev_demo_3	Started	Third Party Server	1	Primary	cc-app-dev-demo-3	✓	Third Party Server
LCA_cc_app_dev_demo_4	Started	Third Party Server	1	Primary	cc-app-dev-demo-4	✓	Third Party Server
LFMT_Collector	Started	Genesys Generic Server	8.5.103.03	Primary	cc-app-dev-demo-4	✓	LFMT_Collector
LFMT_Indexer	Started	Genesys Generic Server	8.5.103.03	Primary	cc-app-dev-demo-4	✓	LFMT_Indexer
LFMT_WBA_DEMO3	Started	Genesys Generic Server	8.5.103.06	Primary	cc-app-dev-demo-3	✓	CC_Agent
ms	Started	Message Server	8.5.100.30	Primary	cc-app-dev-demo-4	✓	Message_Server_B51
SCI	Unknown	Solution Control Interface	8.0.3				Solution_Control_Interface_B03
scs	Started	Solution Control Server	8.5.100.46	Primary	cc-app-dev-demo-4	✓	Solution_Control_Server_B51
sip	Started	T-Server	8.1.103.96	Primary	cc-app-dev-demo-3	✓	TServer_SIPPhemisea_B11
stat	Started	Stat Server	8.5.112.17	Primary	cc-app-dev-demo-3	✓	Stat_Server_B51
urs	Started	Universal Routing Server	8.1.400.69	Primary	cc-app-dev-demo-3	✓	UR_Server_B14
WBSCClient	Unknown	Genesys Generic Client	9.0.000.00				Workbench_Client_9.0
WB9IO	Stopped	Genesys Generic Server	9.0.000.00		cc-app-dev-demo-2	✓	Workbench_IO_9.0

Genesys Engage Application Configuration Pre-installation Steps

Please follow the sections below to:

- Import the Workbench **Installation Package** using GAX
- Provision the Workbench **9 IO** (Server) Application using GAX
- Provision the Workbench **9 Client** using GAX
- Provision the Workbench 9 Client **Role** using GAX

Workbench Installation Package Import using GAX

The following steps provide a guide to importing the mandatory GAX Workbench 9 Installation Package containing the Workbench 9 Templates and Applications configuration:

1. **Login** into GAX
2. Navigate to **Administration**
3. Click **New**
4. **Select** the **Installation Package Upload (includes templates)** option
5. Click **Next**

6. Click **Choose File**
7. Browse to the extracted **Workbench_9.x.xxx.xx_Pkg** folder
8. Double-click into the **templates** folder
9. Double-click into the **wb_9.x_gax_ip_template** folder
10. Double-click the **Workbench_9.x_GAX_Template_IP.zip** file
11. Click **Finish**
12. Click **Close** when the import has successfully completed

Example Workbench Installation Package:

The screenshot shows the GAX Administration console with the 'Installation Packages' table and the 'Software Installation Wizard' dialog.

Installation Packages Table:

Name	Version	Locale	Operating System	Status	Update Time
Environment					
default					
Pulse	9.0.002.01	ENU	Windows (64 bit)	Complete	2019-06-17
VP Reporting Plu...	9.0.022.25	ENU	Windows (64 bit)	Complete	2019-06-27
Workbench	9.1.000.00	ENU	Windows (32 bit)	Complete	just now

Software Installation Wizard:

Installation Package Selection


Choose an installation package to import and click Finish to start importing.

Import has successfully completed.

✓ Workbench 9.1.000.00 - Windows (32 bit) / ENU

The procedure above will provide the:

IO and Client Templates:

<input type="checkbox"/>	 Workbench_Client_9.1.000.00	Genesys Generic Client	9.1.000.00
<input type="checkbox"/>	 Workbench_IO_9.1.000.00	Genesys Generic Server	9.1.000.00

Workbench Admin Role:

General	Assigned Privileges		
Role Members			
Assigned Privileges			
	<input type="checkbox"/>	Display Name	Since Version
	<input type="checkbox"/>	▼ CfgGenericServer	
	<input type="checkbox"/>	▼ Workbench_Admin	
	<input type="checkbox"/>	🔑 Workbench Admin Access	9.1.000.00

Provisioning the Workbench IO (Server) Application using GAX

This Workbench IO (Server) Application is used by Workbench to integrate to Genesys Engage components such as Configuration Server.

1. Log into **GAX**
2. Navigate to **Configuration**.
3. In the **Environment** section, select **Applications**.
4. In the **Applications** section, select **New**.
5. In the **New Properties** pane, complete the following:
 1. If not already, select the **General** tab
 2. In the **Name** field, enter an Workbench IO Application **Name** i.e. **WB9IO**
 3. Click on the **Template** field and navigate and select the **Workbench_IO_9.x.xxx.xx** Template
 4. In the **Working Directory** field, enter "." (period character)
 1. Not explicitly required for Workbench 9, but a mandatory CME field
 5. In the **Command Line** field, enter "." (period character)
 1. Not explicitly required for Workbench 9, but a mandatory CME field
 6. In the **Host** field, select the host where Workbench Primary will be installed.
 7. In the **Connections** tab, click the **Add** icon to establish connections to the following applications:
 1. (Optional) The primary or proxy Configuration Server from which the configuration settings will be retrieved. This is only required if connecting to Configuration Server via TLS. See the [Genesys Security Deployment Guide](#) for further instructions. **Note:** The security certificates must be generated using the SHA-2 secure hash algorithm.
6. Click **Save** to save the new application.

The Workbench IO (Server) Application (i.e. "WB9IO") configuration has now been completed; this

enables Workbench to Genesys Engage integration both from an installation and run-time perspective.



Important

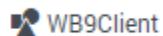
- For a successful Workbench installation/run-time, the System/User Account for the Workbench IO application must have **Full Control** permissions.
- The "WB9IO" Application will have a dummy [temp] Section/KVP due to mandatory prerequisite packaging.

Provisioning the Workbench Client Application using GAX

This Workbench Client Application is used by Workbench for Client Browser connections to Workbench, without it, no Users can log into Workbench.

1. Log into **GAX**
2. Navigate to **Configuration**.
3. In the **Environment** section, select **Applications**.
4. In the **Applications** section, select **New**.
5. In the **New Properties** pane, complete the following:
 1. If not already, select the **General** tab
 2. In the **Name** field, enter an Workbench Client Application **Name** i.e. **WB9Client**
 3. Click on the **Template** field and navigate and select the **Workbench_Client_9.x.xxx.xx** Template
6. Click **Save** to save the new application.

The Workbench Client (i.e. **WB9Client**) Application configuration has now been completed; this enables Users to login to Workbench.



Important

- The "WB9IO" (Server) Application (or equivalent name) will have a dummy [temp] Section due to mandatory prerequisite packaging.

Provisioning the Workbench Client **Role** using GAX

1. Log into **GAX**
2. Navigate to **Configuration**.
3. In the **Accounts** section, select **Roles**.
4. In the **Roles** section, select **New**.
5. Select **None** in the drop down for Role Template
6. Click OK
 1. If not already, select the **General** tab
 2. In the **Name** field, enter a Workbench Administrator Role Name - i.e. "**WB9_Admin**"
 3. In the **Description** field, enter "When assigned to Users, grants access to the Workbench\ Configuration Console."
 4. Select the **Role Members** tab
 5. Add your relevant **Access Group(s)** and/or **Person(s)**
 6. Select the **Assigned Privileges** tab
 7. Check the **Workbench Admin Access** checkbox
7. click **Save**

The **WB9_Admin** Role has been created.

Therefore, certain assigned Users, will now have visibility/access to the Workbench Configuration Console, enabling the Configuration of Workbench Applications, Settings and Features.

General	Assigned Privileges		
Role Members			
Assigned Privileges			
Permissions			

<input type="checkbox"/>	Display Name	Since Version	Prerequisite
<input checked="" type="checkbox"/>	▼ CfgGenericServer		
<input checked="" type="checkbox"/>	▼ Workbench_Admin		
<input checked="" type="checkbox"/>	🔑 Workbench Admin Access	9.1.000.00	

An example of the "Super Administrators" Access Group being assigned the "WB9_Admin" Role:

Home > Roles > Roles > WB9_Admin Properties

General	Role Members		
Role Members			
Assigned Privileges			
Permissions			

<input type="checkbox"/>	Name	Tenant	Object Type
<input type="checkbox"/>	🔑 Super Administrators	Environment	Access Group

Workbench	Dashboards	Alarms	Changes	Channel Monitoring	Discover	Visualize	Configuration	Status	fizz
-----------	------------	--------	---------	--------------------	----------	-----------	---------------	--------	------

Workbench	General	Active Alarms	Hosts	Applications
Overview	System Data Retention Period 30 days	<ul style="list-style-type: none"> Critical Alarms 0 Major Alarms 2 Minor Alarms 0 	<ul style="list-style-type: none"> Total Hosts 1 Hosts Up 1 Hosts Down 0 Hosts Unknown 0 	<ul style="list-style-type: none"> Total Applications 5 Applications Up 5 Applications Down 0 Applications Unknown 0
General	Workbench Alarm Expiration 172800 seconds			
Applications				
Hosts				

Changes Console **ChangedBy** field for Genesys Engage Changes

For the Changes Console **ChangedBy** field to be accurate (not "N/A"), the following Genesys Engage configuration is required:

- A connection from the respective Genesys Engage Configuration Server or Configuration Server Proxy to the Genesys Engage Message Server that Workbench is connected to.
- If not already, **standard=network** added to the **log** section of the Configuration Server or Configuration Server Proxy that Workbench is connected to.

Pre - Installation Steps

GAX

System Dashboard

Configuration

Routing Parameters

Administration

Centralized Logs

LFMT

Home > Applications > Applications > confserv Properties

General
(DBID: 99)

Connections

Ports

Connections

☐

Server

Secured

Connection Protocol

Local

Remote

Trace Mode

☐

ms

addp

60

120

Trace On Both Sides

Home > Applications > Applications > confserv Properties

General
(DBID: 99)

Connections

Ports

Tenants

Options

Permissions

Dependencies

Application Options

Application Options

☐

Name

Section

Key

Value

☐

► confserv

☐

► dbserver

☐

▼ log

☐

log \ all

log

all

/home/genesys/_logs/cs/cs

☐

log \ expire

log

expire

10

☐

log \ segment

log

segment

20MB

☐

log \ standard

log

standard

network

☐

log \ verbose

log

verbose

all