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# Workbench User's Guide

Workbench Upgrade - Windows - Primary Node

12/17/2025

# Workbench Upgrade - Windows - Primary Node

The Workbench installation files will be contained in the Genesys My Portal obtained downloaded compressed file.

## Important

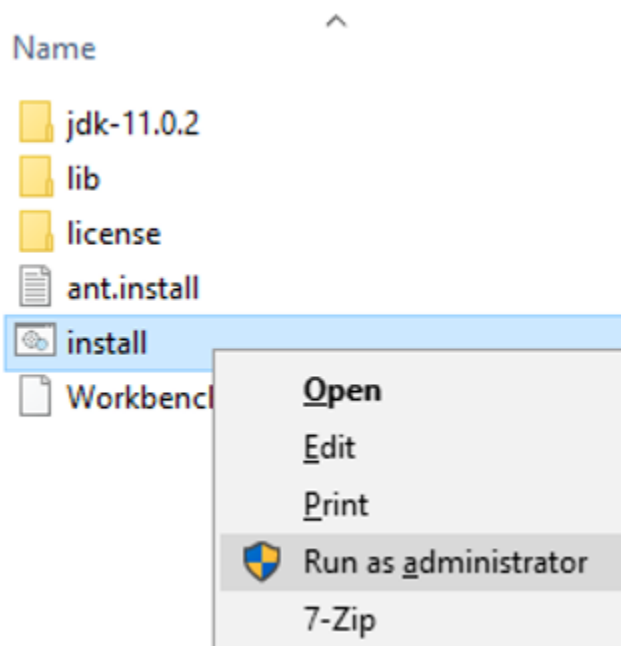
1. All Workbench deployments require a Primary Node. In any WB Cluster deployments, the WB Primary Node must be upgraded prior to upgrading WB Additional nodes/applications. Ensure WB Additional nodes are up and running until the WB Primary node upgrade is completed. Once the WB Primary node upgrade is completed and its "Services" are "Started", proceed with the WB Additional nodes upgrade process in section "Workbench Upgrade - Windows - Additional Node".
2. The Workbench installation uses the Ant Installer component. If during the Workbench upgrade a Network Account install is selected, the Ant Installer prints the username and password details to the "ant.install.log" file. Genesys therefore recommends, after upgrade, at a minimum the "ant.install.log" file be manually edited and the password be masked/deleted.
3. Use an **Administrator** level account when running the Workbench *install.bat* file.
4. Genesys does not recommend installation of its components via Microsoft Remote Desktop.
5. If the Workbench installation is cancelled mid completion, please ensure the Workbench install directory is cleaned/purged prior to attempting another install.
6. For Workbench 9.0 to 9.2 Kibana uses port 8181 and Workbench IO uses port 8182
7. For Workbench 9.3 Kibana uses port 8182 (localhost access only) and Workbench IO uses port 8181

## Warning

- **Before commencing the Workbench upgrade - please ensure the Workbench Host(s) have 'free' at least 3 times the size of the "<WORKBENCH\_INSTALL>/ElasticSearch/data" directory - else the Workbench upgrade process will fail and Workbench data integrity and operation will likely be compromised.**

Please use the following steps to upgrade Workbench 9:

1. Extract the downloaded **Workbench\_9.x.xxx.xx\_Pkg.zip** compressed zip file.
2. Navigate into the **Workbench\_9.x.xxx.xx\_Pkg\ip\Windows** folder.
3. Extract the **Workbench\_9.x.xxx.xx\_Installer\_Windows.zip** compressed zip file.
4. Navigate into the **Workbench\_9.x.xxx.xx\_Installer\_Windows** folder
6. Right Click on the **install.bat** file and select **Run as Administrator**; alternatively, open a command prompt **As Administrator** and run **install.bat**.

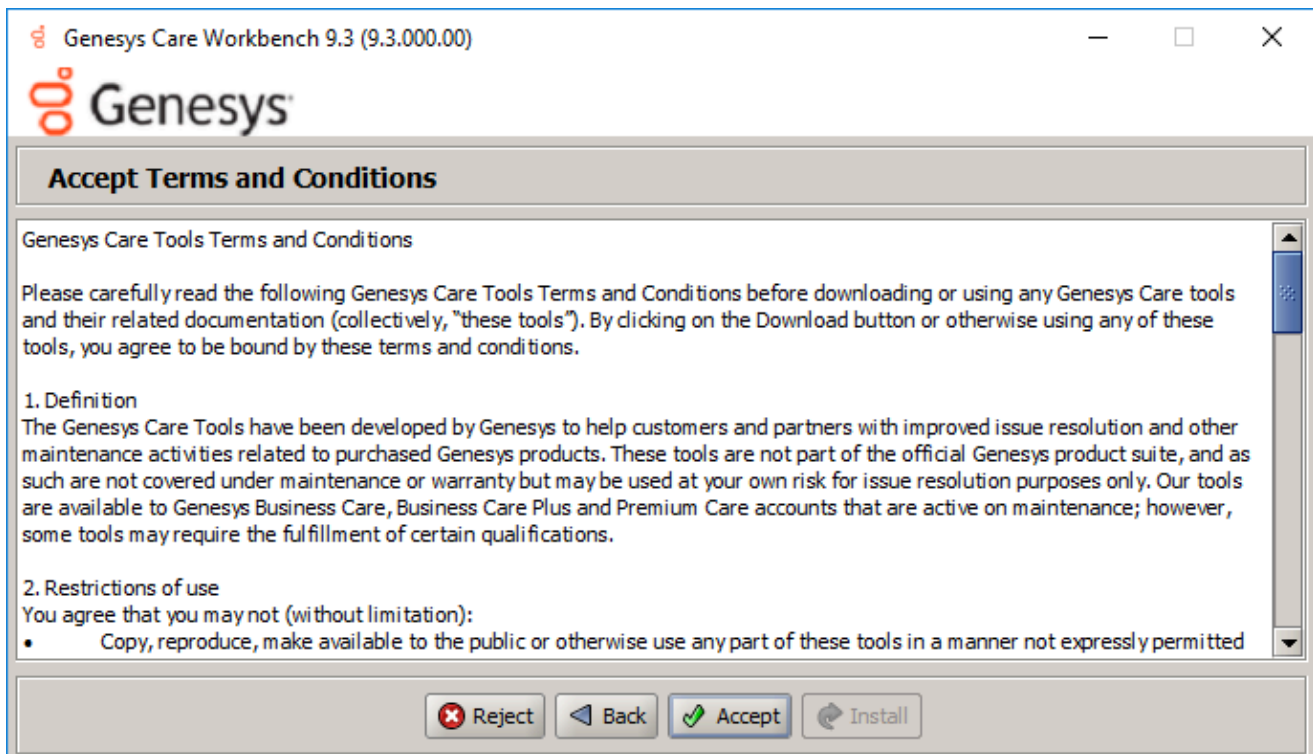


7. On the **Genesys Care Workbench 9.x** screen
  - To start the Workbench upgrade, click **Next**



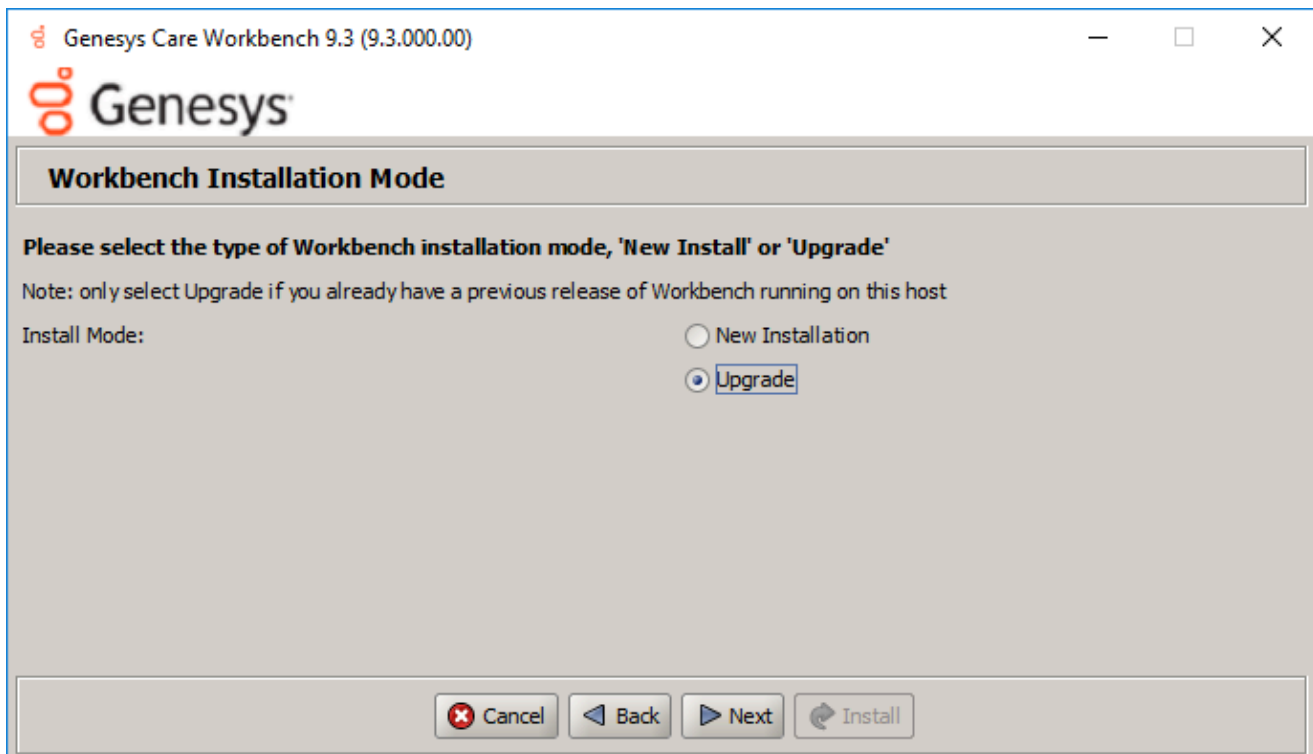
8. Review and if in agreement

- Click **Accept** to the Genesys Terms and Conditions to continue.



9. On the Workbench **Installation Mode** screen

- Select **Upgrade** mode given there is already a previous release of Workbench running on this host/node.



### Important

- All the Workbench components, on this host, where the upgrade installer has been initiated, will be upgraded.

#### 10. On the **Workbench Home Location** folder

- Provide the path where the new Workbench components will be installed (i.e. "C:\Program Files\Workbench\_9.x.xxx.xx")
  - Select **default** to accept the default options
  - Select **Custom** to change the default options

### Important

- This **new** version directory has to be different than the **current/old** Workbench version

installation location.

Genesys Care Workbench 9.3 (9.3.000.00)

**Base Workbench Properties**

**Please provide the Workbench installation folder location.**  
Note: All Workbench components will be installed relative to this location.

Workbench Home Location:

**Hostname: ccdev-st-win4**  
Note: This Hostname will be utilized by the Workbench solution components.

**Please provide the number of Workbench Elasticsearch Nodes.**  
Note: Refer to the section on Sizing of the Workbench 9.0 User Guide for recommendations based on expected volume of data.

Total Elasticsearch nodes?

11. On the Workbench **Primary Zookeeper IP Address and Port**.

- Enter the Primary ZooKeeper IP:Port and click **Next**

Genesys Care Workbench 9.3 (9.3.000.00)

**Workbench Upgrade Mode**

**Please provide the Workbench Primary ZooKeeper IP Address and Port**

Note: The ZooKeeper IP Address, not Hostname and Port (i.e. '10.20.30.1:2181')

**Note: ALL Workbench components on this host will be upgraded**

Workbench Primary ZooKeeper IP Address:Port

Primary ZooKeeper User Name (optional)

Primary ZooKeeper Password (optional)

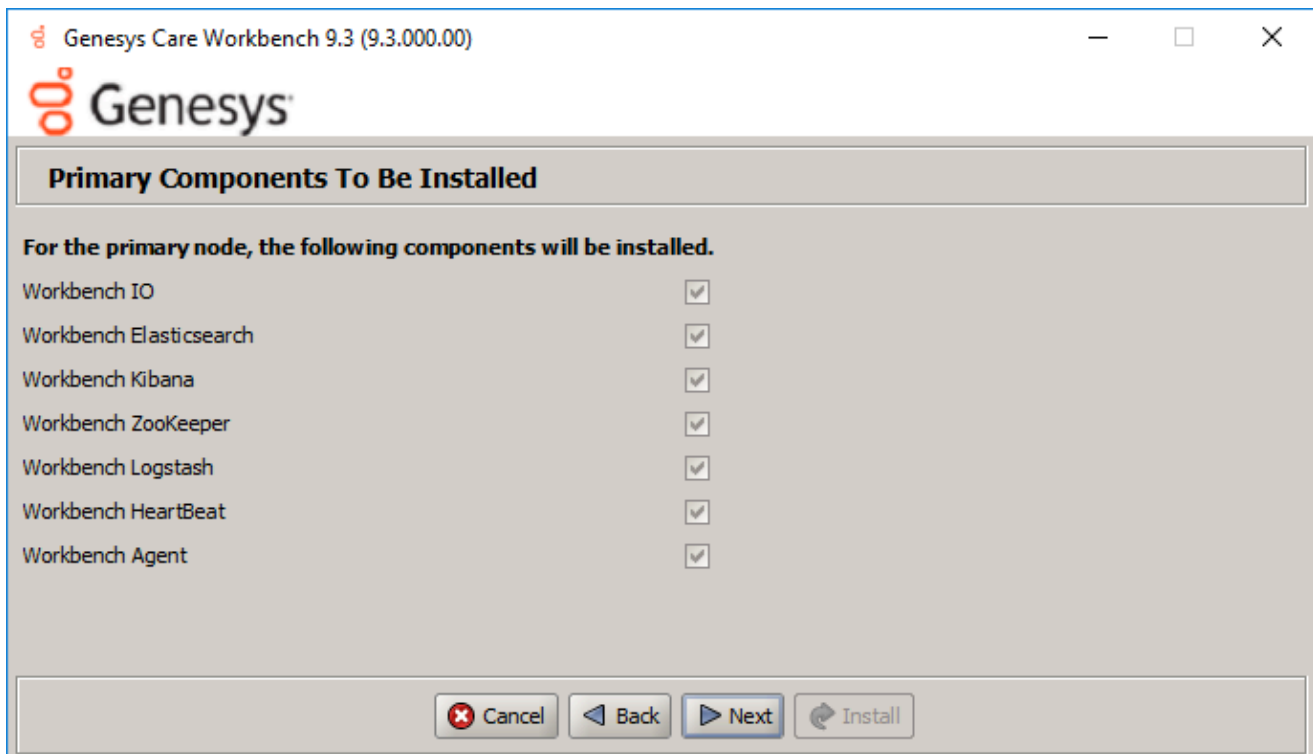
### Important

Provide Primary Zookeeper **IP Address:Port** (i.e. do **not** enter the hostname:port)

12. On the Workbench **Components to be Upgraded** screen.

- Which provides context on which Workbench components will be upgraded
- Click **Next**





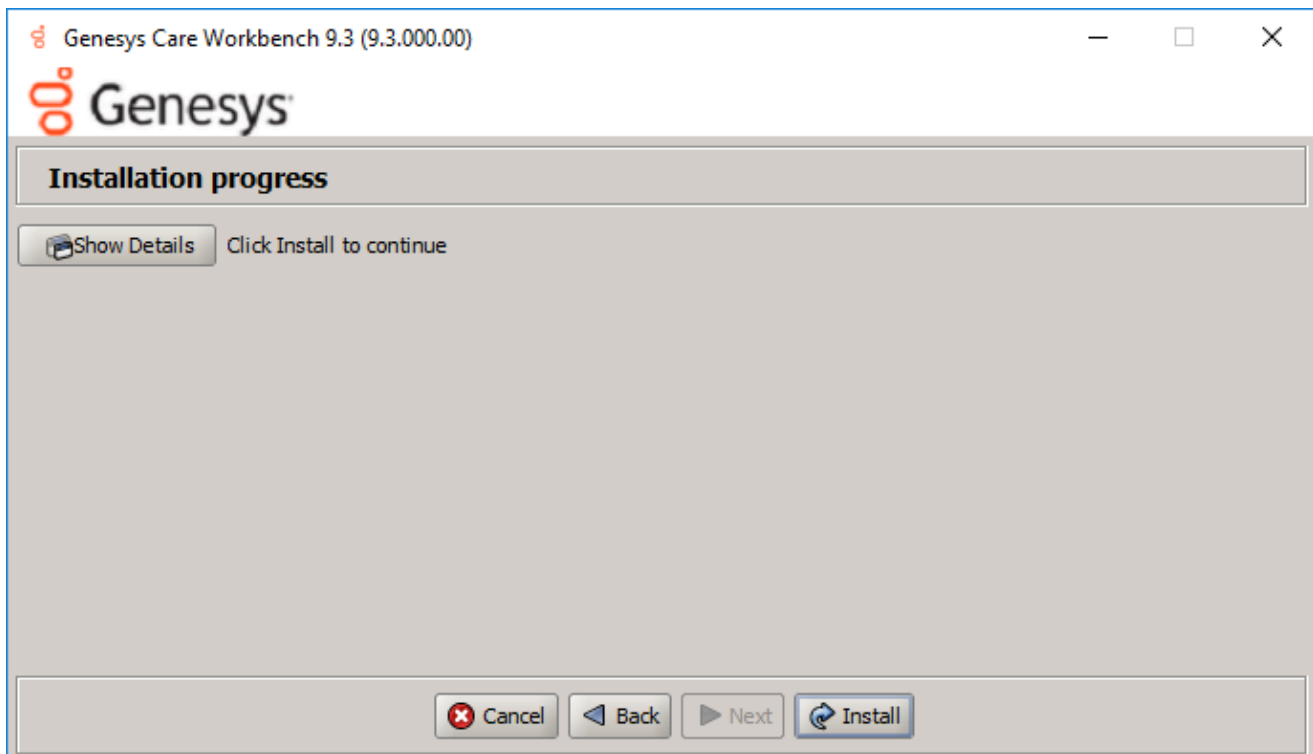
13. On the **Service Account** Settings screen

- The Workbench components are installed and executed as Services and the appropriate permissions are required to install them.
- Select either Local System Account or a Network Account
  - if Network Account is selected, provide the Username and Password to be used.
- Once complete, click **Next**.

The screenshot shows a Windows dialog box titled "Genesys Care Workbench 9.3 (9.3.000.00)". The dialog has a header bar with the Genesys logo and the title. Below the header, the title "Service Account Settings" is displayed in a bold font. The main content area contains the following text: "Please select/provide the service account details for the Workbench components." followed by a note: "Note: Workbench components will run using this service account." Below this, there are two radio buttons for "Account Type": "Local System Account" (which is selected) and "Network Account". Another note follows: "Note: If Network Account is used, please provide the Account Username and Password." Below this note, there are two text input fields: "Network Username:" and "Network Password:". At the bottom of the dialog, there are four buttons: "Cancel" (with a red X icon), "Back" (with a left arrow icon), "Next" (with a right arrow icon), and "Install" (with a circular arrow icon).

14. On the **Installation Progress** screen

- Click **Install**

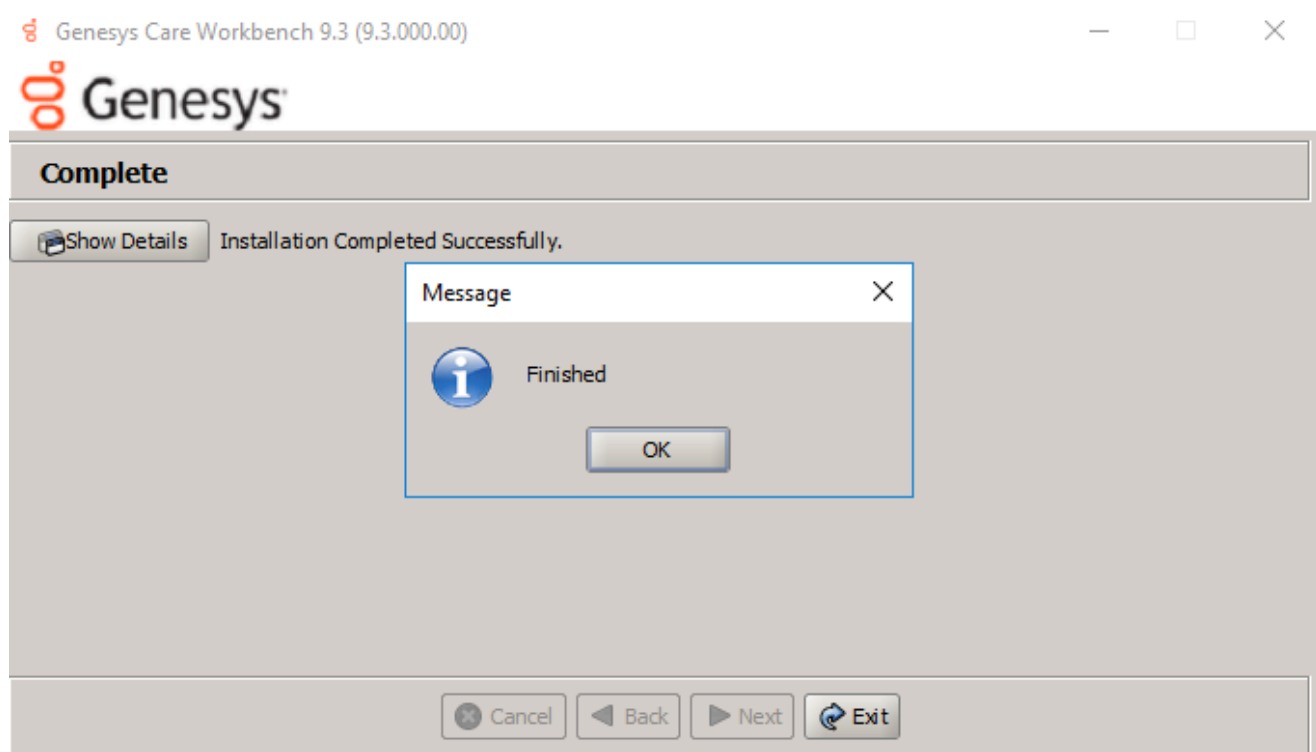


### Tip

- The *Show Details* button allows you to review the steps the installer is taking to install the Workbench component(s).
- This is also a good source for any errors that may be observed during the upgrade process.

15. On the **Installation Complete** screen

- Click **OK** and **Exit** when presented with the **Finished** dialog



## Important

- Once the new Workbench version is installed, new Workbench 9.x.xxx.xx Services will be registered in the Service registry
- The previous Workbench version Services will be automatically **Stopped** and set to **Manual**.
- The Workbench port configuration of upgraded components will be same as the Workbench **old** components.
- The Workbench data and log folders will be automatically created in the new Workbench installed location.
- At the end of the upgrade process, Workbench 9.y.yyy.yy Cluster, data and configuration will be restored as per the prior Workbench 9.x.xxx.xx installation.

## 16. Next Steps

### Important

- The Workbench Primary Node has been upgraded
- If there are Additional Workbench Nodes at this Data-center, please continue to upgrade those using the **Workbench Upgrade - Windows - Additional Node** section as a reference

### Warning

- The respective Workbench Agent Remote (WAR) components, installed on hosts such as SIP, URS, GVP etc, will be upgraded based on the WAR **Upgrade Time** (default 02:00)
- For WB 9.3 the WAR [General] **Log File Location**, **Segment** and **Expire** fields will be blank post an upgrade until the WAR **Upgrade Time** (default 02:00) is triggered and the WAR upgrade is completed