

GENESYS

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Workbench User's Guide

Workbench Upgrade - Windows - Primary Node

4/10/2025

Workbench Upgrade - Windows - Primary Node

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

Important

- 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
- 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.

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Accept Terms and Conditions		
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1. Definition The Genesys Care Tools have been developed by Genesys to help customers and partners with improved issue resolution and other maintenance activities related to purchased Genesys products. These tools are not part of the official Genesys product suite, and as such are not covered under maintenance or warranty but may be used at your own risk for issue resolution purposes only. Our tools are available to Genesys Business Care, Business Care Plus and Premium Care accounts that are active on maintenance; however, some tools may require the fulfillment of certain qualifications.		
 2. Restrictions of use You agree that you may not (without limitation): Copy, reproduce, make available to the public or otherwise use any part of these tools in a manner not expressly 	permitted	•
🔇 Reject 🖪 Back 🖉 Accept @ Install		

- 9. On the Workbench Installation Mode screen
- Select Upgrade mode given there is already a previous release of Workbench running on this host/ node.

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Workbench Installation Mode			
Please select the type of Workbench installation mode, 'New Install'	or 'Upgrade'		
Note: only select Upgrade if you already have a previous release of Workbench	running on this host		
Install Mode: ONew	v Installation		
 Upg 	rade		
Cancel Back Ne	ext 🖉 Install		

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.				
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<mark>ල්</mark> Genesys				
Base Workbench Properties				
Please provide the Workbench installation folder location.				
Note: All Workbench components will be installed relative to this locat	tion.			
Workbench Home Location:	C:\Program Files\Workbench_9.3.000.00		Browse	
Hostname: ccdev-st-win4				
Note: This Hostname will be utilized by the Workbench solution compo	ments.			
Please provide the number of Workbench Elasticsearch Node	s.			
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?	3			
Cancel ABack	Next @ Install			

- 11. On the Workbench **Primary Zookeeper IP Address and Port**.
 - Enter the Primary ZooKeeper IP:Port and click Next

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Workbench Upgrade Mode			
Please provide the Workbench Primary ZooKeeper IP Address	s 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 upgrad	led		
Workbench Primary ZooKeeper IP Address:Port	10.20.192.157:2181		
Primary ZooKeeper User Name (optional)			
Primary ZooKeeper Password (optional)			
Cancel S Cancel	Next 🖉 Install		

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

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Primary Components To Be I	nstalled	
For the primary node, the following co	mponents will be installed.	
Workbench IO		
Workbench Elasticsearch		
Workbench Kibana		
Workbench ZooKeeper	¥	
Workbench Logstash	¥	
Workbench HeartBeat	¥	
Workbench Agent	¥	
	Cancel Back Next Install	

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**.

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Service Account Settings		
Please select/provide the service account details for the Wo	rkbench components.	
Note: Workbench components will run using this service account.		
Account Type:	 Local System Account 	
	O Network Account	
Note: If Network Account is used, please provide the Account Usernam	ne and Password.	
Network Username:		
Network Password:		
Cancel Sack	Next Install	

14. On the **Installation Progress** screen

• Click Install

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Installation progress		
Show Details Click Install to continue		
Cancel Sack Next Constall		

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

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Complete			
Show Details Installation Comple	ted Successfully.		
	Message X		
	Finished		
	ОК		
	Cancel Back Next Exit		

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