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Workbench User's Guide

Pre - Installation Steps

4/22/2025

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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
confserv	Started	Configuration Server	8.5.101.51	Primary	cc-app-dev-demo-4	✓	Configuration_Server_8
ms	Started	Message Server	8.5.100.30	Primary	cc-app-dev-demo-4	✓	Message_Server_851
scs	Started	Solution Control Server	8.5.100.46	Primary	cc-app-dev-demo-4	✓	Solution_Control_Server_851
sip	Started	T-Server	8.1.103.96	Primary	cc-app-dev-demo-3	✓	TServer_SIPPhemias_811
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. The table lists several packages, including Pulse, VP Reporting Plus, and Workbench. The wizard dialog shows that the Workbench 9.1.000.00 package has been successfully imported.

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 Plus	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	<input type="checkbox"/>	Display Name	Since Version	Prerequisite
Assigned Privileges	<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

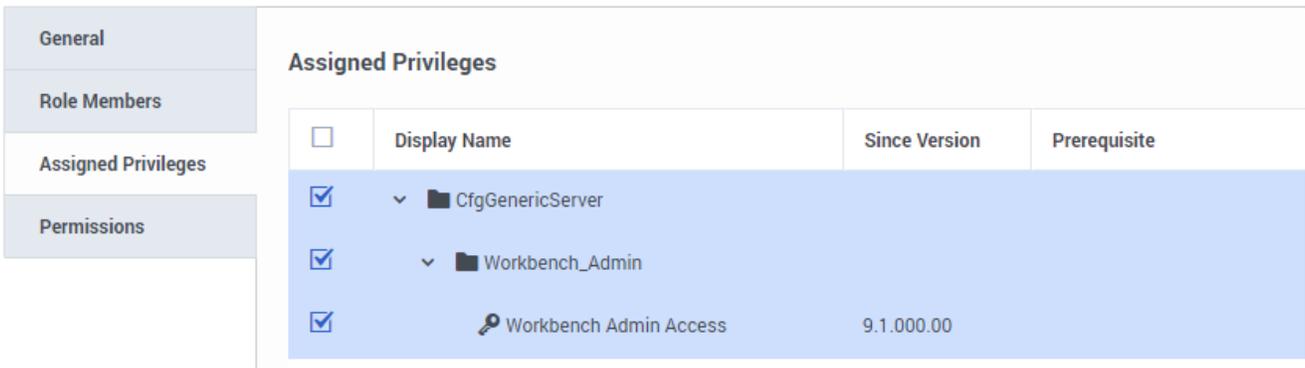
- The "WB9IO" (Server) Application (or equivalent name) will have a dummy [temp] Section due to mandatory prerequisite packaging.

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**

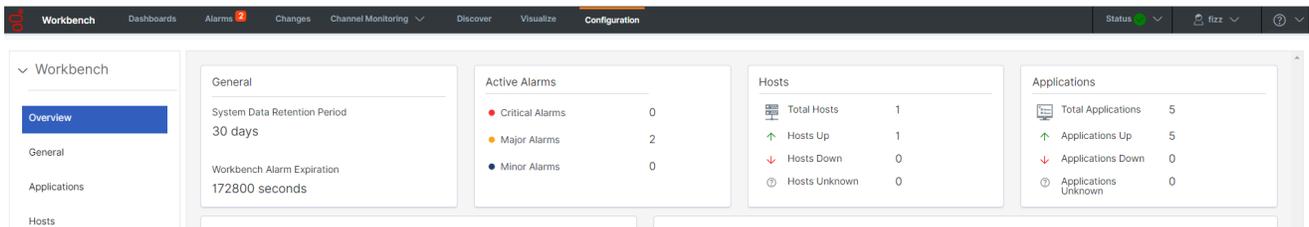
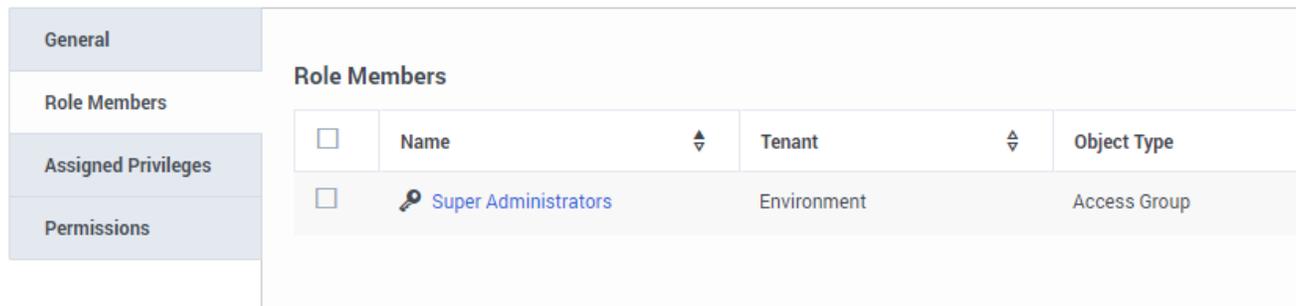
The **WB9_Admin** Role has been created.

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



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

Home > Roles > Roles > WB9_Admin Properties



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.

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GAX System Dashboard **Configuration** Routing Parameters Administration Centralized Logs LFMT

Home > Applications > Applications > confserv Properties

General (DBID: 99)	Connections						
Connections	<input type="checkbox"/>	Server	Secured	Connection Protocol	Local	Remote	Trace Mode
Ports	<input type="checkbox"/>	ms		addp	60	120	Trace On Both Sides

Home > Applications > Applications > confserv Properties

General (DBID: 99)	Application Options				
Connections	<input type="checkbox"/>	Name	Section	Key	Value
Ports	<input type="checkbox"/>	► confserv			
Tenants	<input type="checkbox"/>	► dbserver			
Options	<input type="checkbox"/>	▼ log			
Permissions	<input type="checkbox"/>	log \all	log	all	/home/genesys/_logs/cs/cs
Dependencies	<input type="checkbox"/>	log \expire	log	expire	10
Application Options	<input type="checkbox"/>	log \segment	log	segment	20MB
	<input type="checkbox"/>	log \standard	log	standard	network
	<input type="checkbox"/>	log \verbose	log	verbose	all