

# **GENESYS**

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# Workbench User's Guide

Pre - Installation Steps

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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	<b>Description/Comments</b>
Genesys Engage Workbench Client application/ object	enables Engage CME configured Users to log into Workbench
Genesys Engage <b>Workbench IO</b> (Server) application/object	enables integration from Workbench to the Engage CS, SCS and MS $% \left( \mathcal{S}^{\prime}_{\mathrm{S}}\right) =0$
Genesys Engage <b>Configuration Server</b> 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 <b>Message Server</b> application/ object	enables integration from Workbench to the Engage MS; Config change ChangedBy metadata
Genesys Engage <b>SIP Server</b> 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:

oj a	AX System Dashboard Configuration	Ro	uting Par	rameters	Admin	istration Centralized Logs	LFMT									default ?
Home >	Applications > Applications (21)															
Selec	🖋 Edit 🜑 New 🛅 Delete 🗄 More 🛛 🍳	Sh	ow Quick	Filter D	irectory	Applications (Application	Folder) ~								C Refresh	Environment
	Name 🗳		Status	8	÷	Type 👌	Version	¢	Mode	÷	Host 👙	\$	Server	Template		\$
	_DAPS		Ø	N/A												
	_DEFAULT		Ø	N/A												
	R confserv		0	Started		Configuration Server	8.5.101.51		Primary		cc-app-dev-demo-4	•	/	Configuration_Server_8		
	📽 dbs_log		ø	Started		DB Server	8.5.100.06		Primary		cc-app-dev-demo-4	•	/	DBServer_851		
	📽 gax		ø	Started		Genesys Administrator S	9.0.001.33		Primary		cc-app-dev-demo-4	•	/	Genesys_Administrator_Extension_900		
	ng IRD		0	Unknown		Interaction Routing Desi	8.1.4							Routing_Designer_814		
	LCA_cc_app_dev_demo_1		0	Started		Third Party Server	1		Primary		cc-app-dev-demo-1	•	/	Third Party Server		
	LCA_cc_app_dev_demo_2		0	Started		Third Party Server	1		Primary		cc-app-dev-demo-2	•	/	Third Party Server		
	LCA_cc_app_dev_demo_3		0	Started		Third Party Server	1		Primary		cc-app-dev-demo-3	•	/	Third Party Server		
	LCA_cc_app_dev_demo_4		0	Started		Third Party Server	1		Primary		cc-app-dev-demo-4	•	/	Third Party Server		
	P LFMT_Collector		0	Started		Genesys Generic Server	8.5.103.03		Primary		cc-app-dev-demo-4	•	/	LFMT_Collector		
	R LFMT_Indexer		0	Started		Genesys Generic Server	8.5.103.03		Primary		cc-app-dev-demo-4	•	/	LFMT_Indexer		
	LFMT_WBA_DEM03		0	Started		Genesys Generic Server	8.5.103.06		Primary		cc-app-dev-demo-3	•	/	CC_Agent		
	📌 ms		0	Started		Message Server	8.5.100.30		Primary		cc-app-dev-demo-4	•	/	Message_Server_851		
	n SCI		0	Unknown		Solution Control Interface	8.0.3							Solution_Control_Interface_803		
	📽 sos		0	Started		Solution Control Server	8.5.100.46		Primary		cc-app-dev-demo-4	•	/	Solution_Control_Server_851		
	📽 sip		0	Started		T-Server	8.1.103.96		Primary		cc-app-dev-demo-3	•	/	TServer_SIPPremise_811		
	📌 stat		0	Started		Stat Server	8.5.112.17		Primary		cc-app-dev-demo-3	•	/	Stat_Server_851		
	📽 urs		0	Started		Universal Routing Server	8.1.400.69		Primary		cc-app-dev-demo-3	•	/	UR_Server_814		
	📽 WB9Client		0	Unknown		Genesys Generic Client	9.0.000.00							Workbench_Client_9.0		
	n w w w w w w w w w w w w w w w w w w w		0	Stopped		Genesys Generic Server	9.0.000.00				cc-app-dev-demo-2	•	/	Workbench_J0_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:

G GA	X System Dashb	oard	Agents Configura	ation Routi	ng Parameters Report	s Administration							
Insta	Installation Packages												
Inetal	lation Dackage								$\langle \rangle$	Software Installation Wizard			
mətai	lation Fackage	.5			Q. Quick Filter		m	+	0	Software installation wizard			
										Installation Package Selection			
Name		₹	Version	Locale	Operating System	Status		Update	lime				
🔻 🗳 E	Invironment									Choose an installation package to import and click Finish to start importing.			
•	default									Import has successfully completed.			
	😂 Pulse		9.0.002.01	ENU	Windows (64 bit)	Complete		2019-06	17	✔ Workbench 9.1.000.00 - Windows (32 bit) / ENU			
	灯 VP Reporting Plu	J	9.0.022.25	ENU	Windows (64 bit)	Complete		2019-06	-27				
	😹 Workbench		9.1.000.00	ENU	Windows (32 bit)	Complete		just now					

The procedure above will provide the:

IO and Client Templates:

Workbench_Client_9.1.000.00	Genesys Generic Client	9.1.000.00
Workbench_IO_9.1.000.00	Genesys Generic Server	9.1.000.00

Workbench Admin Role:

General	Assigne	d Privileges		
Role Members	_	-		
Assigned Privileges		Display Name	Since Version	Prerequisite
, and the second second		✓ ■ CfgGenericServer		
		V Workbench_Admin		
		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:
    - (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"
  - 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	Assigne	Assigned Privileges										
Role Members												
Assigned Drivileges		Display Name	Since Version	Prerequisite								
Assigned Privileges		✓ CfgGenericServer										
Permissions		Vorkbench_Admin										
		🔑 Workbench Admin Access	9.1.000.00									

An example of the "Super Administrators" Access Group being assigned the "WB9\_Admin" Role:

General		Polo Ma	mhore						
Role Membe	rs	NOIE ME	empers						
Assigned Pri	signed Privileges		Name	\$	Tenant	₽	Object Type		
Permissions			👂 Super Administrate	ors	Environment		Access Group		
Workbench Dashboa	rds Alarms <sup>2</sup> Cł	nanges Channel Monit	oring ∨ Discover Visualize <b>Con</b>	figuration			Status 🚽 🗸 🖄 fizz 🗸		
Workbench Dashbos Workbench	rds Alarms 2 Cr General	nanges Channel Monit	oring V Discover Visualize Con Active Alarms	figuration	Hosts	Applic	Status V Č fizz V		
Workbench Dashboen Workbench	rds Atarms 2 Cl General System Data Re 30 days	nanges Channel Monit	oring V Discover Visualize Con Active Alarms • Critical Alarms	figuration 0	Hosts Total Hosts 1 A Hosts In 1	Applica	Status V S fizz V atlons fotal Applications 5 sociariants Lin 5		
Workbench Deshboos Workbench Wervlew	rds Alarms 2 CT General System Data Re 30 days Workbench Alar	tention Period	ortng Visualize Con Active Alarms Critical Alarms Major Alarms Minor Alarms	figuration 0 2 0	Hosts ☐ Total Hosts 1 ↑ Hosts Up 1 ↓ Hosts Down 0	Applica T T A V A	Status V C fizz V ations Total Applications 5 Applications Up 5 Applications Down 0		
Workbench Dashbos Workbench Werview Seeral	rds Atarms 2 Cl General System Data Re 30 days Workbench Alar 172800 secc	anges Channel Mont tention Period m Expiration ndS	oring V Discover Visualize Con Active Alarms • Critical Alarms • Major Alarms • Minor Alarms	Reparation 0 2 0	Hosts Total Hosts 1 ↑ Hosts Up 1 ↓ Hosts Down 0 ③ Hosts Unknown 0	Applica T Applica Applica A Applica Applic	Status Image: Transmission of the status   ations 5   Repellications Down 0   Applications Down 0   Inhiknown 0		

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.

#### Pre - Installation Steps

GAX Sy	ystem Dashb	ooard	Configuration	Routing Parameters	Administra	ation Cer	ntralize	ed Logs LFMT						
Home > Applications > Applications > confserv Properties														
General ( DBID: 99 )		Connect	tions											
Connections			Server		Å	Secured	¢	Connection Protocol	Å	Local	\$	Remote	☆	Trace Mode
Ports			ms					addp		60		120		Trace On Both Sides

Home > Applications > Applications > confserv Properties

General ( DBID: 99 )	Application Options					
Connections	Name	∲ Se	ction 🔶	Key	⇔	Value
Ports	Confserv					
Tenants	□ ► dbserver					
Options						
Permissions		loc		all		/home/genesus/ logs/cs/cs
Dependencies				evnire		10
Application Options				expire		20140
		100		segment		ZUMB
	log \ standard	log		standard		network
	log \ verbose	log		verbose		all