Workbench User's Guide

Workbench Installation - Linux - Primary Node

4/4/2025

Contents

Workbench Installation - Linux - Primary Node

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

Review this link for details on downloading Workbench: Downloading Workbench

Important

1. Workbench requires the installation of a Primary Node at each and every Data-Center.

2. The Workbench Primary Node must be installed prior to installing Workbench Additional Nodes.

3. Workbench ships with its own pre-bundled Java distribution, OpenJDK11; all Workbench components will be configured through the installation to use this Java distribution and should not affect any other components that may be installed on the host.

4. The Workbench installation uses the Ant Installer component, if during the Workbench installation a Network Account install is selected, the Ant Installer prints the username and password details to the "ant.install.log" file. Genesys therefore recommends, post installation, at a minimum the "ant.install.log" file be manually edited and the password be masked/deleted.

5. **Use a non root account** with sudo permissions when running the Workbench **install.sh** file.

6. If the Workbench installation is cancelled mid completion, please ensure the Workbench install directory is cleaned/purged **prior** to attempting another install

Warning

- When installing Workbench on Linux ensure you **use a non root account** with sudo permissions for all the commands below - **DO NOT USE THE <ROOT> ACCOUNT**.

Warning

- Workbench uses the Hostname for component configuration

- Please ensure hostname resolution between Workbench and Engage Hosts is accurate and robust

- If the Workbench Hosts have multiple NIC's, please ensure the Hostname resolves to the desired IP Address prior to Workbench installation

Please use the following steps to install Workbench **9.x.xxx.xx** on Linux:

1. Run **tar zxf Workbench_9.x.xxx.xx_LINUX.tar.gz** to extract the downloaded *Workbench_9.x.xxx.xx_LINUX_Pkg.tar.gz* compressed file.

2. Navigate into the **ip\linux** folder.

3. Run **tar zxf Workbench_9.x.xxx.xx_Installer_Linux.tar.gz** - to extract the *Workbench_9.x.xxx.xx_linux.tar.gz* compressed tar file.

   ### Warning
   - **For the next command please ensure you do not prefix with sudo**

4. Run **./install.sh** (**DO NOT** prefix *./install.sh* with *sudo*)

5. Genesys Care Workbench - Installation
   - Press **Enter** on the **Genesys Care Workbench 9.x** screen to start the Workbench installation.


```
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 Genesys Care Workbench 9.3
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Welcome to the Genesys Care Workbench 9.3 installer. Press enter to continue.
```

6. Genesys Workbench license agreement.
   - Press **Enter** to view the Genesys Workbench license agreement
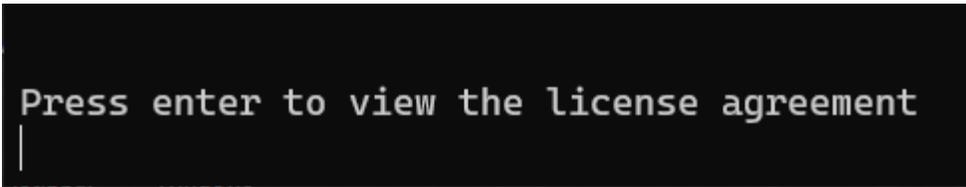
7. Review license agreement

   • Enter **N** for the next page, or press anything else to scroll to the end of the Terms and Conditions
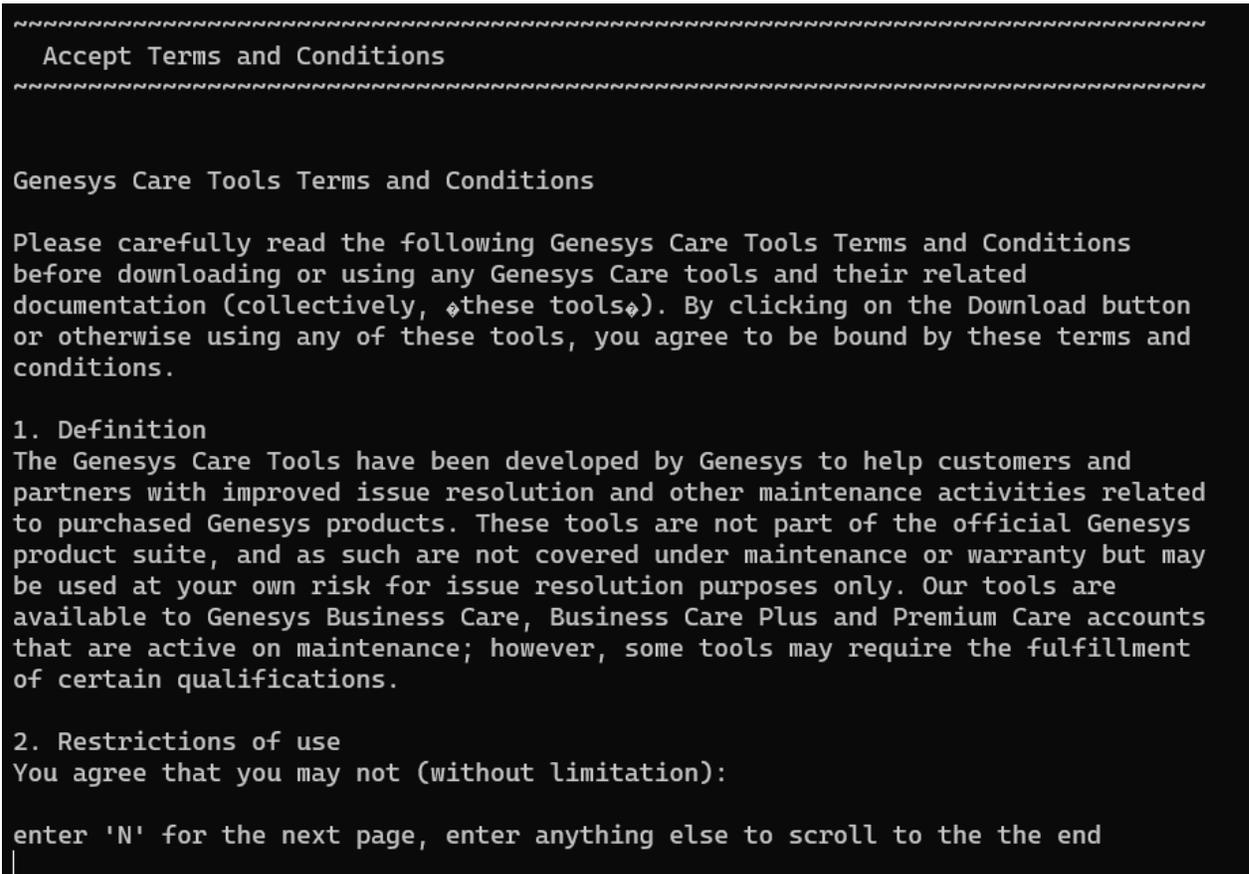
8. Genesys Workbench **Terms and Conditions**

   • If you agree to the Genesys Workbench Terms and Conditions, press **Enter** (default=Y) or enter **Y** to continue.

```
YOU EXPRESSLY ACKNOWLEDGE AND AGREE THAT USE OF THE GENESYS CARE TOOLS IS AT
YOUR SOLE RISK.  THE GENESYS CARE TOOLS ARE PROVIDED �AS IS� AND WITHOUT
WARRANTY OF ANY KIND.  GENESYS EXPRESSLY DISCLAIMS ALL WARRANTIES AND/OR
CONDITIONS EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED
WARRANTIES AND/OR CONDITIONS OF MERCHANTABILITY OR SATISFACTORY QUALITY AND
FITNESS FOR A PARTICULAR PURPOSE.  GENESYS DOES NOT WARRANT THAT THE USE OF THE
GENESYS CARE TOOLS WILL BE UNINTERRUPTED OR ERROR-FREE, OR THAT ANY DEFECTS WILL
BE CORRECTED.  NO ORAL OR WRITTEN INFORMATION OR ADVICE GIVEN BY GENESYS SHALL
CREATE A WARRANTY OR IN ANY WAY INCREASE THE SCOPE OF THIS WARRANTY.  CUSTOMER
ASSUMES THE ENTIRE COST OF ALL NECESSARY SERVICING, REPAIR OR CORRECTION.
BECAUSE SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OF IMPLIED WARRANTIES,
SOME OF THE ABOVE EXCLUSIONS MAY NOT APPLY TO YOU.  THIS DISCLAIMER DOES NOT
LIMIT OR EXCLUDE ANY LIABILITY FOR DEATH OR PERSONAL INJURY CAUSED BY GENESYS�
NEGLIGENCE.
Limitation of Liability.
GENESYS SHALL NOT BE LIABLE UNDER ANY THEORY FOR ANY DAMAGES SUFFERED BY
CUSTOMER OR ANY USER OF THE GENESYS CARE TOOLS.  UNDER NO CIRCUMSTANCES,
INCLUDING NEGLIGENCE, SHALL GENESYS BE LIABLE FOR ANY INCIDENTAL, SPECIAL,
INDIRECT OR CONSEQUENTIAL DAMAGES ARISING OUT OF OR RELATING TO THIS LIMITED
GRANT OF RIGHTS.  SOME JURISDICTIONS DO NOT ALLOW THE LIMITATION OF INCIDENTAL
OR CONSEQUENTIAL DAMAGES SO THIS LIMITATION MAY NOT APPLY TO YOU.

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Do you accept the license? Y or N   [default:Y]
```

9. Workbench Installation Mode

   - There are 2 Installation Modes:

     - **New Installation** - no Workbench 9.x components are yet running on this host/node

     - **Upgrade** - you already have Workbench 9.x components running on this host/node and wish to upgrade

   - Press **Enter** or enter **1** for **New Installation** given this is a new Workbench Primary Node installation and not an upgrade.

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  Workbench Installation Mode
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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:
  Enter a number
  1) New Installation [default]
  2) Upgrade
```

10. Workbench Installation Type

- There are 2 Installation Types:

  - **Primary Node** - there are currently no Workbench components running on this host/node

  - **Additional Node** - you're installing additional Workbench components on this host/node to form a Workbench Cluster

- Press **Enter** or enter **1** for **Primary Node**, given this is a Workbench Primary Node installation and not an Additional node.

> ## Important
>
> - The Workbench Primary Node installation must/will include ALL of the Workbench components below:
>
>   - Workbench IO
>
>   - Workbench Agent
>
>   - Workbench Elasticsearch
>
>   - Workbench Kibana
>
>   - Workbench Logstash
>
>   - Workbench Heartbeat
>
>   - Workbench ZooKeeper
>
> - Therefore if/when **Primary Node** is selected, ALL mandatory Workbench Primary components above will be installed on the host.

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  Workbench Installation Type
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PLEASE SELECT THE TYPE OF WORKBENCH INSTALLATION; 'PRIMARY' OR 'ADDITIONAL'
Note: It is necessary that a primary node be installed prior to installing any additional nodes.
Node Type:
  Enter a number
  1) Primary Node [default]
  2) Additional Node(s)
```

11. **DEFAULT** or **CUSTOM** installation

    - Install Workbench with Default or Custom settings:

      - **Default** - the respective Workbench components **Default** settings will be used.

        - default settings being binaries, paths, config, ports etc

      - **Custom** - or, if required, you can change the default settings by selecting a **Custom** install.

- In the example below, **1** was entered for the **Default** installation; the respective Workbench component **default** (including binaries, paths, config, ports etc) settings will be used.

```
PLEASE SELECT EITHER A 'DEFAULT' OR 'CUSTOM' INSTALLATION TYPE.
Note: Default will use pre-configured settings. With Custom you can modify the default paths,
ports, etc. settings.
Settings Type:
  Enter a number
  1) Default [default]
  2) Custom
|
```

Or, if required, Enter **2** for Custom; to allow modification of the default settings (paths, config, ports etc) via multiple component screens

12. Workbench **DATA-CENTER** name

- Workbench Data-Centers are a logical concept to categorize and optimize the respective Workbench Hosts, Applications and ingested data for event distribution, visualization context and filtering purposes

  - Enter the **Data-Center name** for this Workbench node (i.e. "EMEA", "LATAM", "Chicago" - do NOT use "default")

    - Note: The Data-Center name is **case-sensitive**, limited to a maximum of **10**, Alphanumeric and underscore characters only.

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  Base Workbench Properties
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PLEASE PROVIDE A DATA-CENTER (SITE) NAME THAT IS ASSOCIATED WITH WORKBENCH INSTALLATION
Note: This Data-Center name will be used to categorize the respective Hosts, Applications and ingested data
for event distribution, visualizaion context and filtering purposes
Data Center Name:   [default:]
EMEA
```

> ## Important
>
> - Workbench Data-Centers is a logical concept to categorize and optimize the respective Workbench Hosts, Applications and ingested data for event distribution, visualization context and filtering purposes
>
> - Each Workbench host, and the respective applications within that host, are assigned to a Data-Center, this is mandatory

13. Workbench Base Properties - Installation Path

- The destination installation path to which the Workbench components will be copied

  - Enter the Workbench component **installation path** (press Enter to accept the default of **/opt/ Genesys/Workbench_9.1.000.00**)

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   Base Workbench Properties
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PLEASE PROVIDE THE WORKBENCH INSTALLATION FOLDER LOCATION.
Note: All Workbench components will be installed relative to this location.
Workbench Home Location:    [default:/opt/Genesys/Workbench_9.3.000.00]
```

14. Workbench Base Properties - Hostname

- The Hostname of the machine is displayed for reference

```
Hostname: cc-app-dev-demo-1
Note: This Hostname will be utilized by the Workbench solution components.
```

15. Workbench Base Properties - Number of Elasticsearch Nodes

- The number of Workbench Elasticsearch Nodes to use for this deployment

  - Enter the Total **Number of Workbench Elasticsearch Nodes** for this Data-Center (press Enter to accept the default of **3**, which is correct even if you are deploying a single node)

```
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?    [default:3]
```

Important

The Elasticsearch component is bundled with Workbench and is used to store all of the ingested data related to Workbench. An instance of Elasticsearch is installed through the Workbench Primary Node installation; For other, HA node instances, you can use the Workbench installer and proceed through the Workbench Additional Node(s) installation.

16. Components to be Installed

- Information on which Workbench components are being installed on this host/node

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   Primary Components To Be Installed
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FOR THE PRIMARY NODE, THE FOLLOWING COMPONENTS WILL BE INSTALLED.
Install the following component? Y or True to install, or press Enter to skip.
Workbench IO   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench Elasticsearch   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench Kibana   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench ZooKeeper   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench Logstash   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench HeartBeat   [default:true]   [required]

Install the following component? Y or True to install, or press Enter to skip.
Workbench Agent   [default:true]   [required]
```

17. PureEngage Configuration Server Hostname/IP, Port and Workbench IO/Client application objects

- The Engage settings to which this Workbench node will integrate too
- Enter the:
  - Genesys Engage Configuration Server Hostname/IP address
  - Genesys Engage Configuration Server Port (i.e. 2020)
  - Genesys Engage Workbench Server Application Name (i.e. "WB9IO")
  - Genesys Engage Workbench Client Application Name (i.e. "WB9Client")

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  PureEngage (PE) Configuration Server (CS) Settings
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PLEASE PROVIDE FOLLOWING SETTINGS TO ENABLE WORKBENCH TO PUREENGAGE INTEGRATION.
PE CS Host/IP Address:   [default:]
135.39.0.63

PE CS Port:   [default:]
2020

PE Workbench Server Application Name:   [default:]
WB9IO

PE Workbench Client Application Name:   [default:]
WB9Client

The Workbench installer will now validate connectivity to the PureEngage CS. It will also compare
the alarms currently defined within your CS against the standard set of alarms used in Workbench.
Any missing alarms will automatically be added and listed within the installation output log file.
```

> ### Important
> The Workbench Server and Client applications must have been previously created/
> existing in the Genesys Engage Configuration Server; please review the Planning
> and Deployment\Planning section of this document for more details. From a
> Workbench perspective these Applications are case-sensitive therefore please
> verify case/spelling.

18. PureEngage Settings - Solution Control Server (SCS) and Message Server (MS)

- The Engage SCS and MS settings to which this Workbench node will integrate too

    - Enter the corresponding number relevant to Genesys Engage SCS and MS applications for
      Workbench to connect to based on the associated Configuration Server previously supplied.

```
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  PureEngage Solution Control Server and Message Server Settings
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PLEASE SELECT THE RESPECTIVE PUREENGAGE SOLUTION CONTROL SERVER (SCS) APPLICATION.
Note: This SCS application is used by Workbench to ingest/clear PureEngage alarm events.
SCS Application:
  view available options
  1) sjo_scs_a
  2) frm_scs_a
  3) bne_scs_a
  4) spo_scs_a
  5) man_scs_a
  Enter a number
2

PLEASE SELECT THE RESPECTIVE PUREENGAGE MESSAGE SERVER (MS) APPLICATION.
Note: This MS application is used by Workbench to process metadata relating to configuration.
changes.
Message Server Application:
  view available options
  1) sjo_msgserver_a
  2) frm_msgserver_a
  3) bne_msgserver_a
  4) frm_msgserver_scs_a
  5) spo_msgserver_a
  6) man_msgserver_a
  Enter a number
2
```

19. Installation Progress

   • The progress of the Workbench installation

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  Installation progress
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```

20. Installation Complete

   • The completion of the Workbench installation

```
BUILD SUCCESSFUL
Total time: 4 minutes 23 seconds
Finished
```

Initial Workbench Login - Linux

Navigate to **http://<WORKBENCH_HOST>:8181** to login (Engage CME credentials) to Workbench.

On initial Workbench login you'll be presented with the Workbench "Home Dashboard".

> ### Tip
>
> - The <WORKBENCH_PORT> (default 8181) can be changed via the Custom installation.

Workbench Primary Node/Host - Linux Services

The Workbench Primary node/host will contain the following Linux Services:

- WB_Agent_9.x.xxx.xx
- WB_Elasticsearch_9.x.xxx.xx
- WB_Heartbeat_9.x.xxx.xx
- WB_Kibana_9.x.xxx.xx
- WB_Logstash_9.x.xxx.xx
- WB_Metricbeat_9.x.xxx.xx
- WB_ZooKeeper_9.x.xxx.xx

As an example, executing **sudo service --status-all | grep WB** would yield:

```
Status of WB_Agent_9.x.xxx.xx ...
WB_Agent_9.x.xxx.xx is running
Status of WB_Elasticsearch_9.x.xxx.xx ...
WB_Elasticsearch_9.x.xxx.xx is running
Status of WB_Heartbeat_9.x.xxx.xx ...
WB_Heartbeat_9.x.xxx.xx is running
WB_IO_9.x.xxx.xx is running (3195).
Status of WB_Kibana_9.x.xxx.xx ...
WB_Kibana_9.x.xxx.xx is running
Status of WB_Logstash_9.x.xxx.xx ...
WB_Logstash_9.x.xxx.xx is running
```

Status of WB_Metricbeat_9.x.xxx.xx ...
WB_Metricbeat_9.x.xxx.xx is running
Status of WB_ZooKeeper_9.x.xxx.xx ...
WB_ZooKeeper_9.x.xxx.xx is running

Stopping/Starting Workbench

To stop Workbench, stop the Workbench Services in this order:

- WB_IO_9.x.xxx.xx
- WB_Kibana_9.x.xxx.xx
- WB_Metricbeat_9.x.xxx.xx
- WB_Elasticsearch_9.x.xxx.xx
- WB_ZooKeeper_9.x.xxx.xx
- WB_Agent_9.x.xxx.xx
- WB_Logstash_9.x.xxx.xx
- WB_Heartbeat_9.x.xxx.xx

To start Workbench, start the Workbench Services in this order.

- WB_IO_9.x.xxx.xx
- WB_Elasticsearch_9.x.xxx.xx
- WB_ZooKeeper_9.x.xxx.xx
- WB_Kibana_9.x.xxx.xx
- WB_Logstash_9.x.xxx.xx
- WB_Metricbeat_9.x.xxx.xx
- WB_Agent_9.x.xxx.xx
- WB_Heartbeat_9.x.xxx.xx