GENESYS™

Workbench User's Guide

Workbench Installation - Windows - Primary Node

4/10/2025

Contents

Workbench Installation - Windows - 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 an **Administrator** level account when running the Workbench *install.bat* file.

6. Genesys does not recommend installation of its components via Microsoft Remote Desktop

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

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**.

1. Extract the downloaded **Workbench_9.x.xxx.xx_WINDOWS.zip** compressed zip file.

2. Navigate into the **Workbench_9.x.xxx.xx_WINDOWS\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.

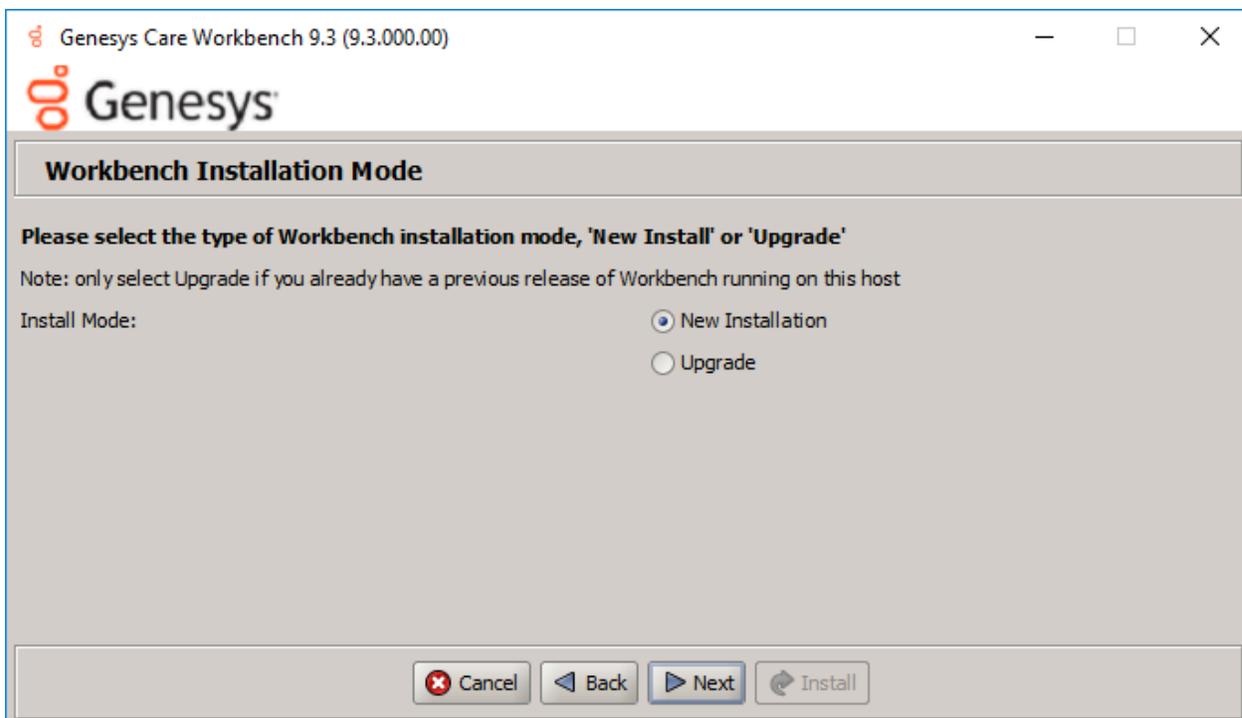5. Open a Command/Powershell Console **As Administrator** and run **install.bat**.

6. Click **Next** on the **Genesys Care Workbench 9.x** screen to start the Workbench installation.
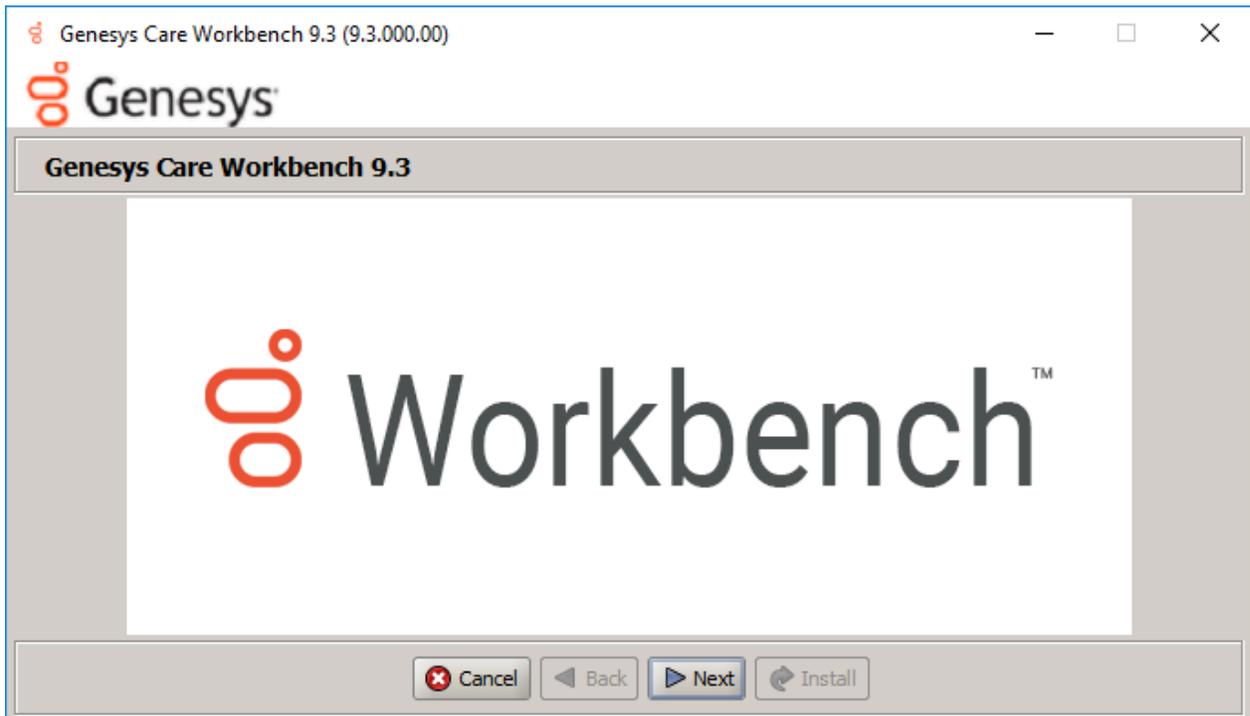
7. Review and if in agreement, click **Accept** to the **Genesys Terms and Conditions** to continue.
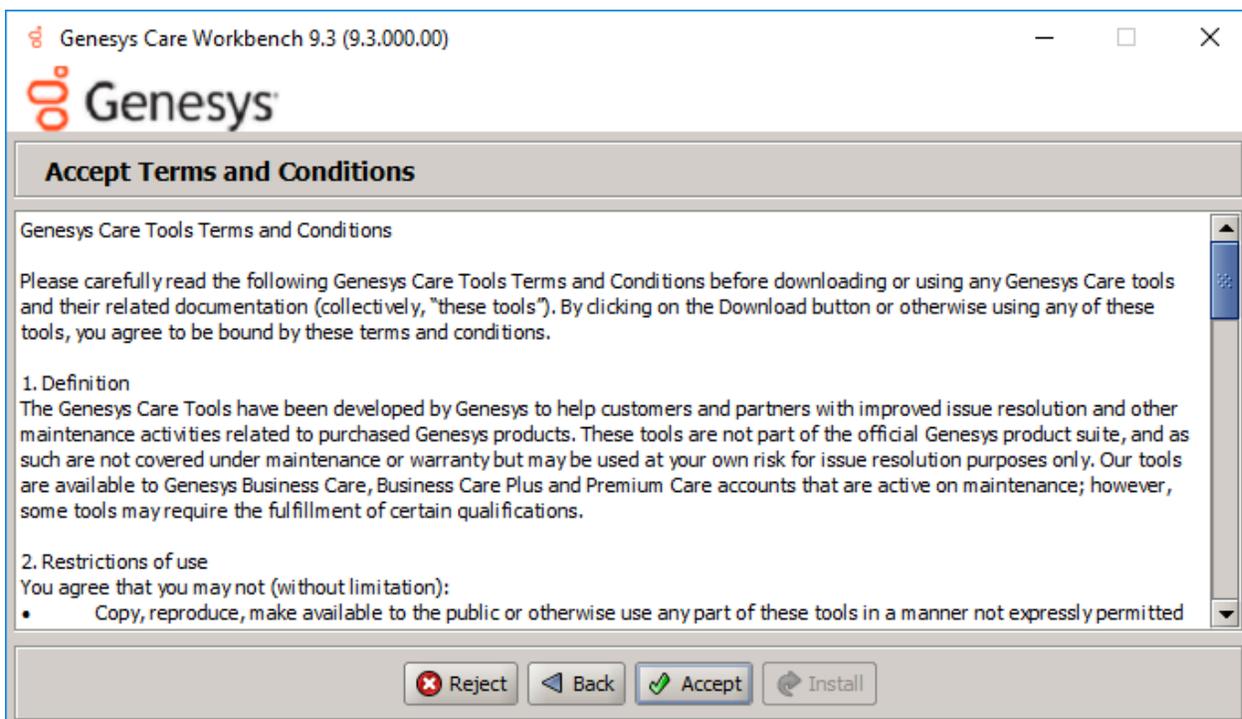
8. Select **New Installation** on the Installation Mode screen
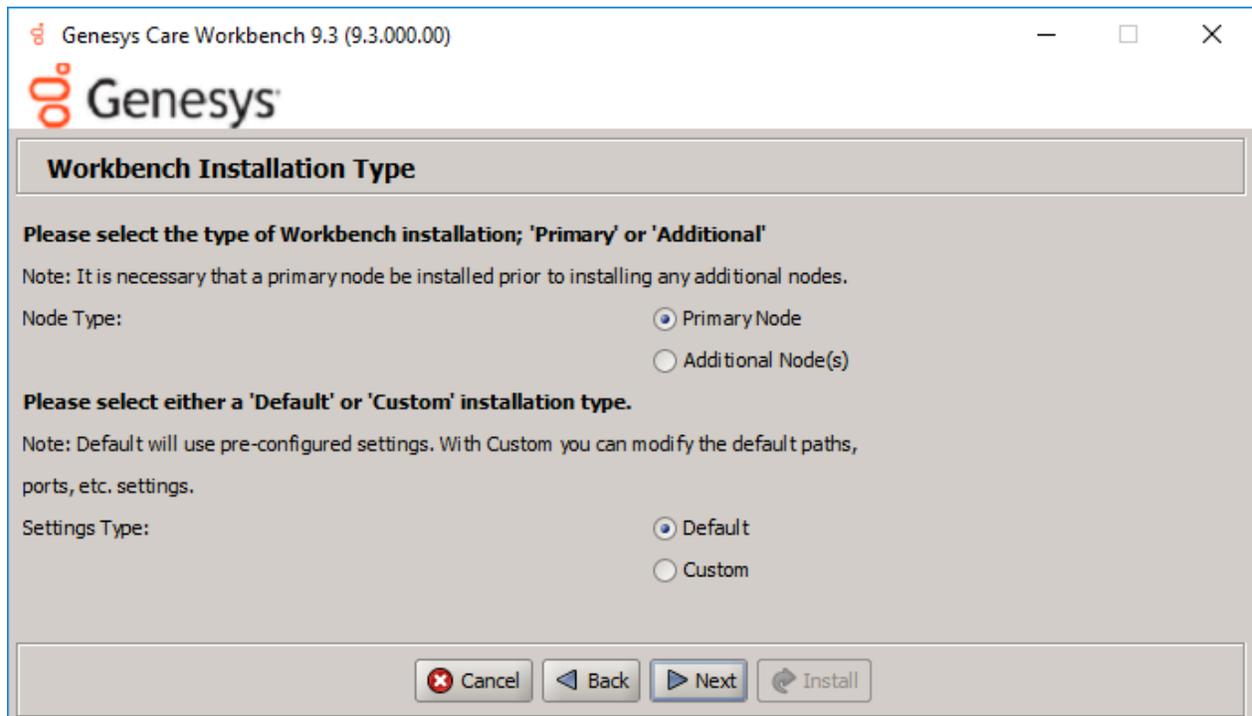

9. Select the **Installation Type**

- The next Workbench **Installation Type** screen contains multiple Workbench installation options; Workbench contains multiple components:

  - Workbench IO

  - Workbench Agent

  - Workbench Elasticsearch

  - Workbench Kibana

  - Workbench Logstash

  - Workbench Heartbeat

  - Workbench ZooKeeper.

- Select **Primary Node** (given we're installing the first, Primary, Workbench node/components).

- Next, choose between the **Default** or **Custom** installation type.

  - For the **Default** type, the respective Workbench component **default** (including binaries, paths, config, ports etc) options will be used.

  - Or, if required, you can change these default options (paths, config, ports etc) by selecting a **Custom** install.

Important

- The Workbench Primary Node installation must/will include ALL of the Workbench components above

  - Therefore if/when **Primary Node** is selected, ALL mandatory Workbench Primary components above will be installed on the host.

Once you've selected the appropriate options, click **Next**.

> ## Important
>
> - For High Availability (HA), you can install additional Workbench application nodes/ components
> - The installation of additional Workbench components has been covered in the section "Workbench Installation - Windows - Additional Node".
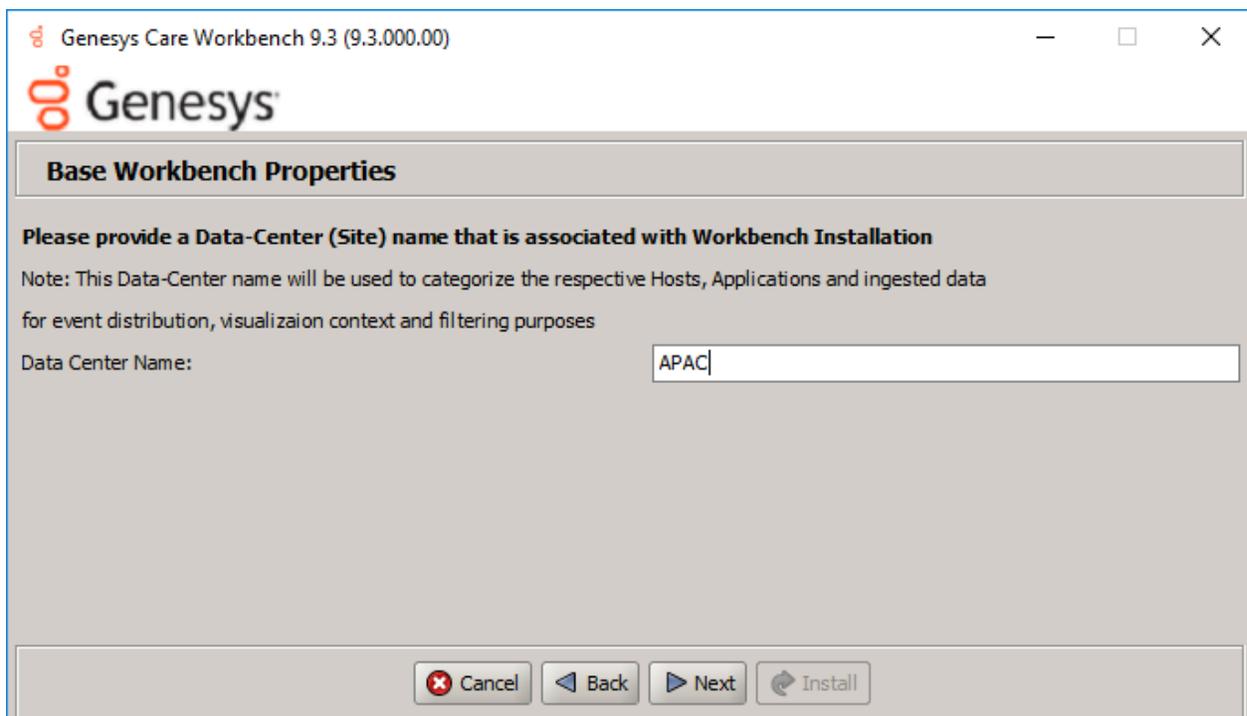
10. Provide the Workbench **Data-Center** name (i.e. "EMEA" or "LATAM" or "Chicago" - do NOT use "default")

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

Once the Data-Center name has been entered, click **Next**.

11. The next **Base Workbench Properties** screen provides basic information that is relevant to all Workbench components

   - This is required irrespective of whether the installation is *Primary* or *Additional* and if *Default* or *Custom* was chosen.

   - Provide the **Workbench Home Location** folder where Workbench components will be installed (i.e. "C:\Program Files\Workbench_9.x.xxx.xx").

   - Review the network **Hostname** - this should be accessible/resolvable within the domain

   - Based on the Planning/Sizing section, enter the **Total** number of Workbench **Elasticsearch Nodes** to be used by the Workbench solution.

     - The default 3 Elasticsearch Node value is correct even if a 1 x Workbench stand-alone architecture is being deployed; this enables future expansion if/when needed.
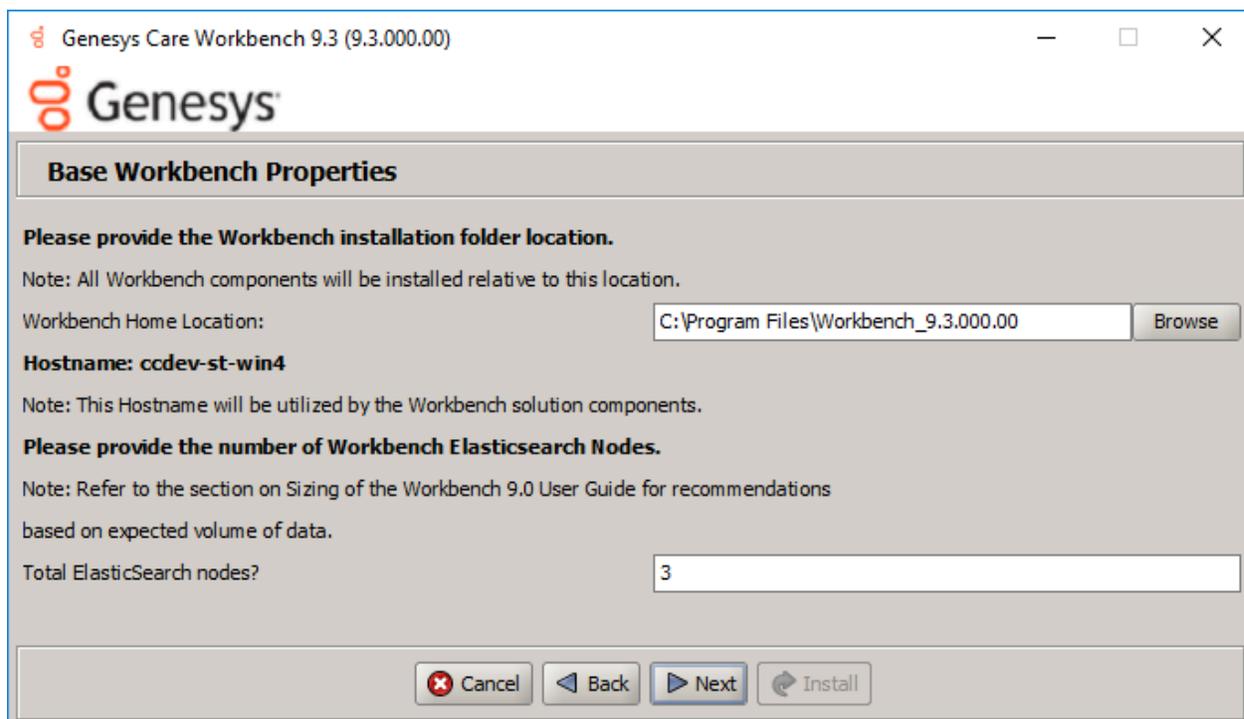
Once all required information is added, click **Next**.

> **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.

12. The next **Primary Components To Be Installed** screen lists the Workbench components that will be installed for the Primary Node
    - ALL the Workbench components to be installed are selected by default, since these are mandatory
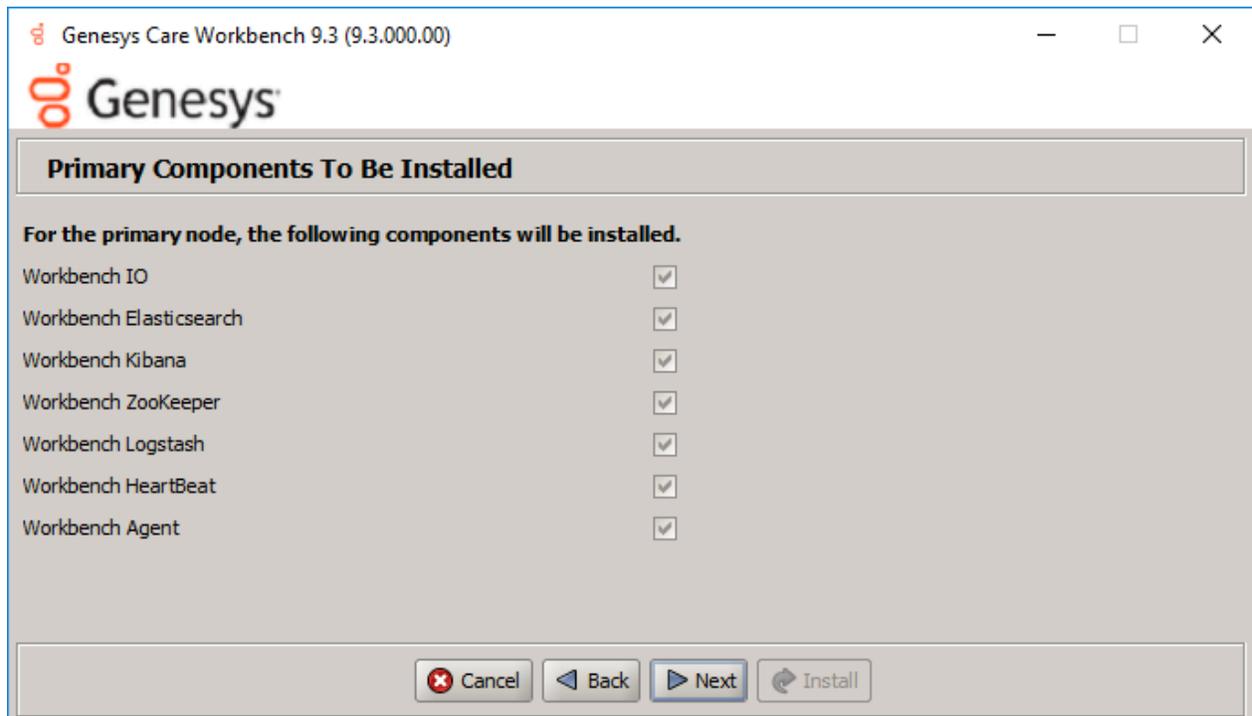
Press **Next** to continue.

> **Important**
> The Workbench Agent is installed regardless of whether this is a Primary or
> Additional Node(s) installation.

13. The next **PureEngage (PE) Configuration Server (CS) Settings** screen relates to the Workbench to
    Genesys Engage integration:
    - Provide the **Genesys Engage Configuration Server Hostname/IP address**
    - Provide the **Genesys Engage Configuration Server Port** (i.e. 2020)
    - Provide the **Genesys Engage Workbench Server Application Name** (i.e. "WB9IO")
    - Provide the **Genesys Engage Workbench Client Application Name** (i.e. "WB9Client")

> **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.

Once complete, verify the settings, click **Next**.

14. The next **Genesys Engage Solution Control Server and Message Server Settings** screen enables selection of the Genesys Engage **Solution Control Server** (SCS) and **Message Server** (MS) applications to which Workbench will connect.
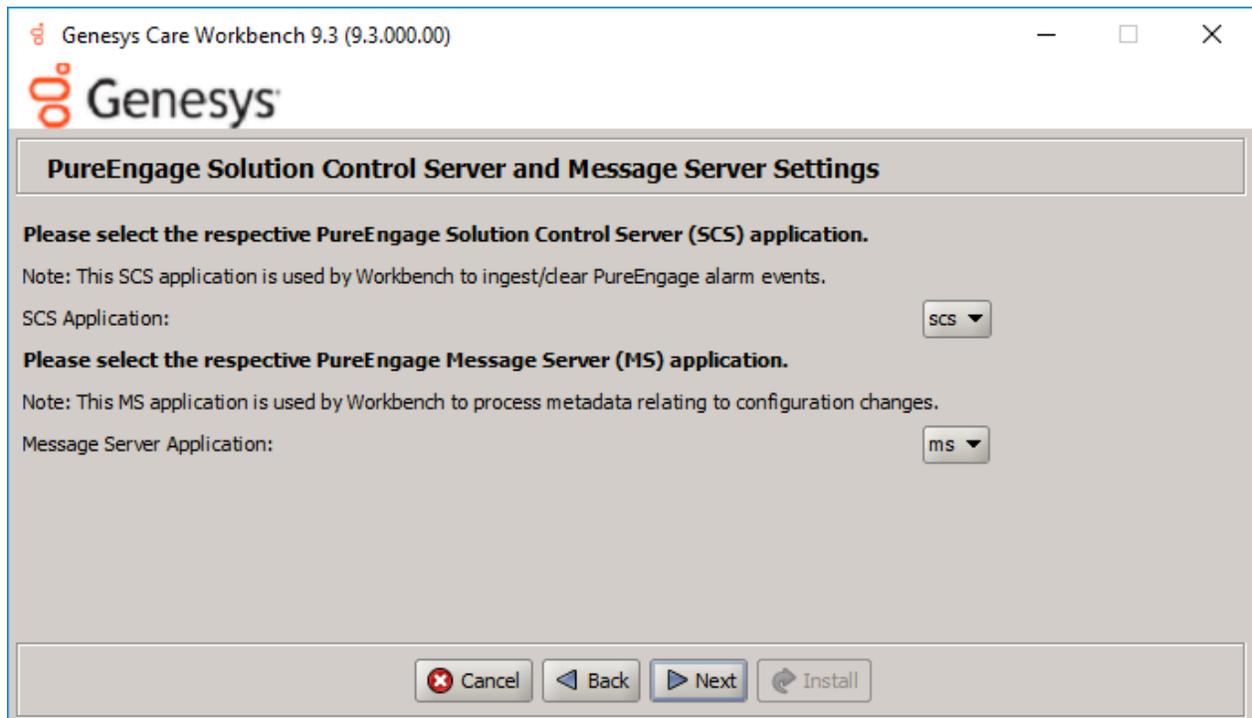
Select the relevant Genesys Engage SCS and MS applications, based on the associated Configuration Server from the previous screen, for Workbench to connect to and click **Next**.

15. The next **Service Account Settings** screen enables the selection of either **System** or **Network** Account.

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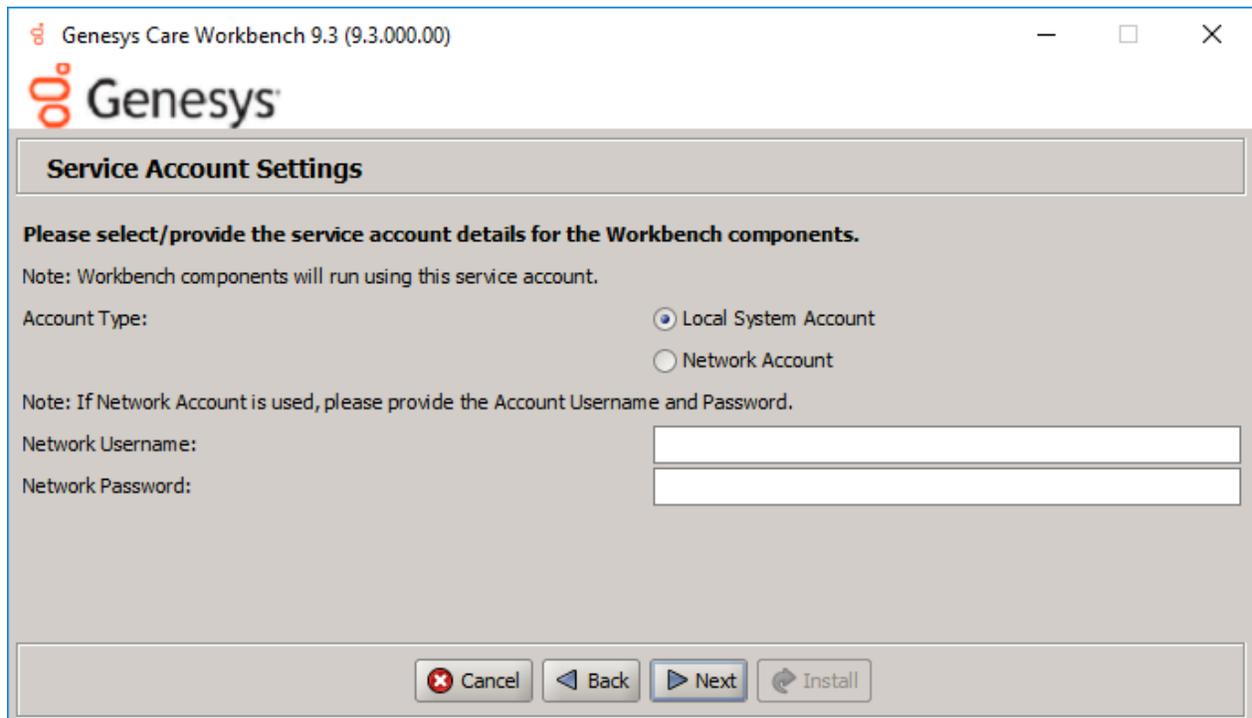
Once complete, click **Next**.

16. With all the workbench options now configured, press **Install** to start the Workbench installation process.
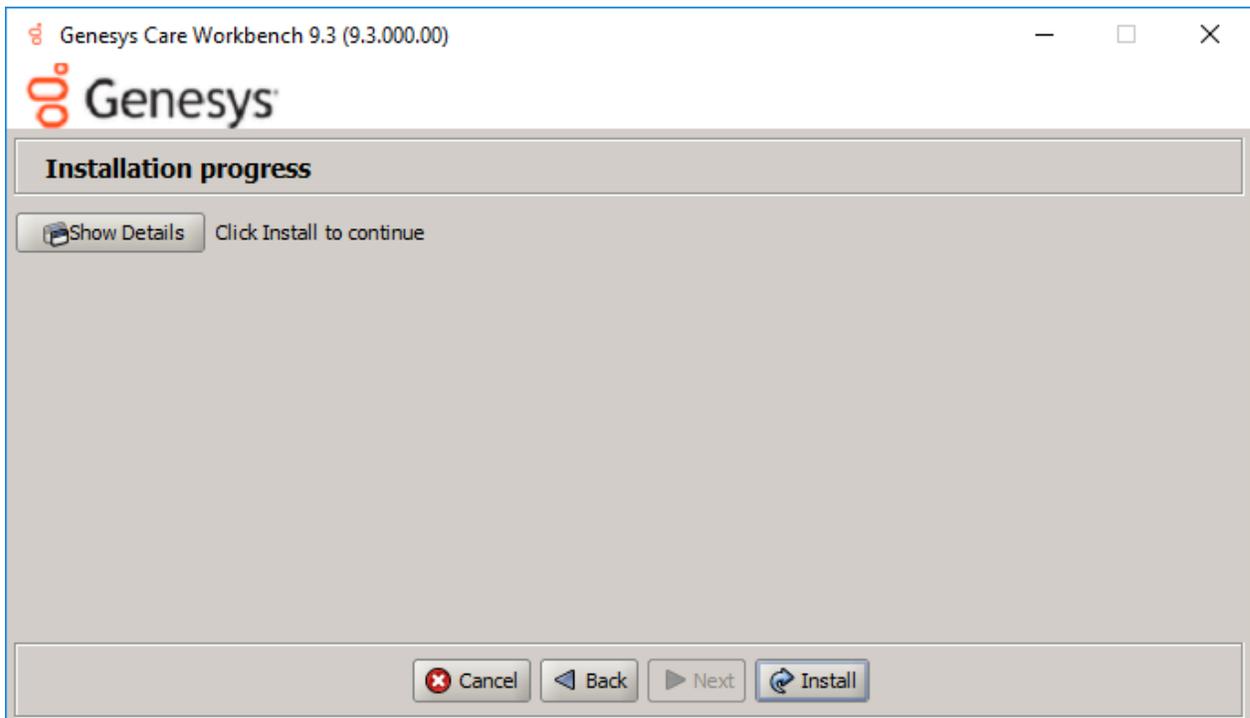
> **Tip**
>
> The **Show Details** button allows you to review the steps the installer is taking to install the Workbench component(s). This is also a good source for any errors that may be observed.

When the Workbench installation completes the dialog below will be presented.
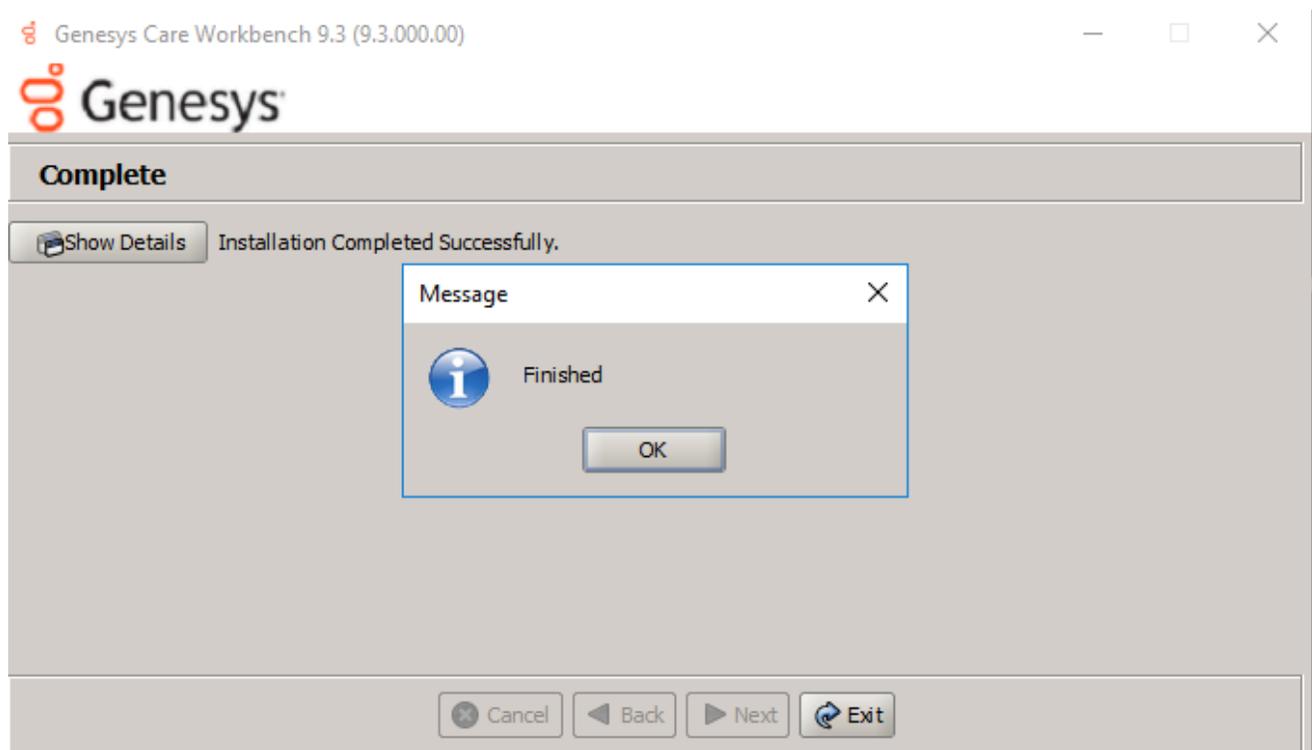
Click **OK** and **Exit** to close the installation dialogs.

Workbench Login

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 - Windows Services

The Workbench Primary Node/Host will contain the following Windows Services:

- Genesys Workbench.IO 9.x.xxx.xx
- Genesys Workbench Elasticsearch 9.x.xxx.xx
- Genesys Workbench ZooKeeper 9.x.xxx.xx
- Genesys Workbench Kibana 9.x.xxx.xx
- Genesys Workbench Logstash 9.x.xxx.xx
- Genesys Workbench Metricbeat 9.x.xxx.xx
- Genesys Workbench Agent 9.x.xxx.xx
- Genesys Workbench Heartbeat 9.x.xxx.xx

Stopping/Starting Workbench

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

- Genesys Workbench.IO 9.x.xxx.xx
- Genesys Workbench Kibana 9.x.xxx.xx
- Genesys Workbench Metricbeat 9.x.xxx.xx
- Genesys Workbench Elasticsearch 9.x.xxx.xx
- Genesys Workbench ZooKeeper 9.x.xxx.xx
- Genesys Workbench Agent 9.x.xxx.xx
- Genesys Workbench Logstash 9.x.xxx.xx
- Genesys Workbench Heartbeat 9.x.xxx.xx

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

- Genesys Workbench.IO 9.x.xxx.xx
- Genesys Workbench Elasticsearch 9.x.xxx.xx
- Genesys Workbench ZooKeeper 9.x.xxx.xx
- Genesys Workbench Kibana 9.x.xxx.xx
- Genesys Workbench Logstash 9.x.xxx.xx
- Genesys Workbench Metricbeat 9.x.xxx.xx
- Genesys Workbench Agent 9.x.xxx.xx
- Genesys Workbench Heartbeat 9.x.xxx.xx