

GENESYS

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Workbench User's Guide

Workbench Installation - Windows - Primary Node

4/10/2025

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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.

Senesys		
Accept Terms and Condi	itions	
Genesys Care Tools Terms and Condi	tions	
Please carefully read the following G and their related documentation (coll tools, you agree to be bound by these	enesys Care Tools Terms and Conditions before downloading or using any Genesys (lectively, "these tools"). By dicking on the Download button or otherwise using any o e terms and conditions.	Care tools of these
1. Definition The Genesys Care Tools have been de maintenance activities related to pur such are not covered under maintena are available to Genesys Business Ca some tools may require the fulfillmer	eveloped by Genesys to help customers and partners with improved issue resolution rchased Genesys products. These tools are not part of the official Genesys product s ance or warranty but may be used at your own risk for issue resolution purposes only are, Business Care Plus and Premium Care accounts that are active on maintenance; nt of certain qualifications.	and other uite, and as . Our tools however,
2. Restrictions of use You agree that you may not (without	limitation):	vpermitted

8. Select **New Installation** on the Installation Mode screen

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<mark>ဗ</mark> ် Genesys			
Workbench Installation Mode			
Please select the type of Workbench installation mode, 'Ne	w Install' or 'Upgrade'		
Note: only select Upgrade if you already have a previous release of	Workbench running on this host		
Install Mode:	 New Installation 		
	🔘 Upgrade		
Cancel Scancel	k Next PInstall		

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.

g Genesys Care Workbench 9.3 (9.3.000.00)		_	×
<mark>ල්</mark> Genesys			
Workbench Installation Type			
Please select the type of Workbench installation; 'Primary'	or 'Additional'		
Note: It is necessary that a primary node be installed prior to instal	ing any additional nodes.		
Node Type:	Primary Node		
	 Additional Node(s) 		
Please select either a 'Default' or 'Custom' installation type			
Note: Default will use pre-configured settings. With Custom you car	modify the default paths,		
ports, etc. settings.			
Settings Type:	 Default 		
	◯ Custom		
Cancel d Bad	Next Install		

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. 		
g Genesys Care Workbench 9.3 (9.3.000.00)	_	×
G enesys		
Base Workbench Properties		
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: APAC		
Cancel Back Next Install		

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.

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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	ion.			
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	nents.			
Please provide the number of Workbench Elasticsearch Node	5.			
Note: Refer to the section on Sizing of the Workbench 9.0 User Guide f	for recommendations			
based on expected volume of data.				
Total ElasticSearch nodes?	3			
Cancel Back	Next Install			

Once all required information is added, click **Next**.



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

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<mark>ဗ</mark> ် Genesys		
Primary Components To Be I	Installed	
For the primary node, the following co	omponents will be installed.	
Workbench IO	\checkmark	
Workbench Elasticsearch	\checkmark	
Workbench Kibana	\checkmark	
Workbench ZooKeeper	V	
Workbench Logstash	\checkmark	
Workbench HeartBeat	V	
Workbench Agent	\checkmark	
	Cancel Back Next @ Install	

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.

ේ Genesys Care Workbench 9.3 (9.3.000.00)	– 🗆 X
<mark>ල්</mark> Genesys	
PureEngage (PE) Configuration Server (CS) Set	tings
Please provide following settings to enable Workbench to Pur	eEngage integration.
PE CS Host/IP Address:	10.31.198.9
PE CS Port:	2020
PE Workbench Server Application Name:	WB9S
PE Workbench Client Application Name:	WB9C
The Workbench installer will now validate connectivity to the PureEnga	ge CS. It will also compare
the alarms currently defined within your CS against the standard set of	falarms used in Workbench.
Any missing alarms will automatically be added and listed within the in	stallation output log file.
Cancel Scancel Back	Next Install

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.

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<mark>ල්</mark> Genesys		
PureEngage Solution Control Server and Message Server Settings		
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: scs 💌		
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: ms 🕶		
Cancel Sack Next @ Install		

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.

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<mark>ල්</mark> Genesys		
Service Account Settings		
Please select/provide the service account details for the Wor	kbench 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	e and Password.	
Network Username:		
Network Password:		
Cancel Back	Next Install	

Once complete, click **Next**.

16. With all the workbench options now configured, press **Install** to start the Workbench installation process.

d Genesys Care Workbench 9.3 (9.3.000.00)	_	×
G Genesys [®]		
Installation progress		
Show Details Click Install to continue		
😢 Cancel 🔍 Back 🕨 Next 💽 Install		

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.

Genesys Care Workbench 9.3 (9.3.0	00.00)	_	×
Complete			
Show Details Installation Comple	ted Successfully.		
	Message ×		
	Finished		
	Cancel A Back Next CExit		

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