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Workbench User's Guide

Workbench Checklist

12/14/2025

Workbench Checklist

Use this section as a proactive checklist for successful Workbench planning, deployment and usage.

Item #	Description
1	Read this document thoroughly and plan your Workbench deployment carefully before starting the Workbench installation.
2	Given Genesys Workbench integrates to Genesys Engage components, ensure you have Genesys Engage knowledge, experience and training before installing Workbench.
3	<p>Review the Architecture section to determine what Workbench architecture best suits your environment - i.e:</p> <ul style="list-style-type: none">• Do you have multiple Engage Data-Centers?• Do you want to ingest host and application process Metric data (i.e. CPU/RAM/DISK/NETWORK) from your Engage Hosts into Workbench?• Do you want Workbench HA?• Do you want the minimal Workbench footprint?
4	Review the Workbench Components section to gain an insight into the function of the Workbench components and their respective integration points.
5	<p>Review the Planning section to understand considerations and determine mandatory items/ actions required prior to installing Workbench - i.e.</p> <ul style="list-style-type: none">• Genesys recommends Engage Configuration Server (CS), Solution Control Server (SCS), Message Server (MS) and SIP Server versions of 8.5+.• Procure the Host/Server hardware running the Supported Workbench Operating Systems• Workbench components require Administrator (Windows) / Sudoer (not the root user) permissions for installation• Ensure the Network Ports utilized by Workbench are from a firewall perspective open and are not already used by other applications• For Linux Pre-Install Steps, ensure the ulimit,

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	<p>/etc/security/limits.conf, /etc/sysctl.conf and vm.max_map_count settings are reviewed and the necessary actions taken</p> <ul style="list-style-type: none"> Review the Linux Network and Security section
6	<p>As part of Planning, carefully review and determine your Workbench Sizing requirements - i.e:</p> <ul style="list-style-type: none"> review, determine and record how many Engage Hosts will be running the Workbench Agent Remote? review, determine and record for how many days you wish to store the ingested data within Workbench?
7	Review Workbench FAQ's for common questions.
8	Review Workbench Best Practises for common guidance.
9	Once the Planning section is complete, proceed to Download Workbench
10	<p>Now review and complete the Workbench Pre-Installation Steps - i.e:</p> <ul style="list-style-type: none"> Workbench Installation Package Import using GAX - this creates the necessary Engage CME Workbench Application Templates and Admin Role Provisioning the Workbench IO (Server) Application using GAX - i.e. "WB9IO" Provisioning the Workbench Client Application using GAX - i.e. "WB9Client" Provisioning the Workbench Client Role using GAX - i.e. "WB9Admin" Follow the Console ChangedBy field for Genesys Engage Changes instructions to ensure the Workbench Changes Console ChangedBy field is accurate (not "N/A")
11	<p>Begin the Workbench installation, starting with the Workbench Primary Node - i.e:</p> <ul style="list-style-type: none"> Workbench Primary Node Windows Installation Workbench Primary Node Linux Installation
12	If Workbench HA is required, begin the Workbench Additional Node(s) installation - i.e:

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	<ul style="list-style-type: none"> • Workbench Additional Node Windows Installation • Workbench Additional Node Linux Installation
13	At this stage, you now have a Workbench single-node or Workbench Cluster deployment up and running at a given Data-Center - i.e. "APAC".
14	Repeat the above steps 9 and 10 for each Data-Center - i.e. for Data-Centers "EMEA" and "LATAM".
15	Hypothetically you now have 3 separate Workbench deployments running at Data-Centers "APAC", "EMEA" and "LATAM".
16	<p>If required, you can synchronize these separate Workbench deployments into a Workbench Distributed architecture for holistic visibility - i.e:</p> <ul style="list-style-type: none"> • Workbench Data-Center Synchronization <ul style="list-style-type: none"> • Overview, Benefits and Limitations • Data-Center Synchronization - Planning • Data-Center Synchronization - Configuration
17	Hypothetically, you now have a Workbench distributed architecture comprising of Workbench instances/Clusters running at Data-Centers "APAC", "EMEA" and "LATAM".
18	Review this section for details on Using Workbench
19	Review the Workbench Agent Remote section for details on ingesting Engage Host and Application Metric data into Workbench via the Workbench Agent Remote component
20	<p>Review this section for details on the Workbench Remote Alarm Monitoring (RAM) feature</p> <ul style="list-style-type: none"> • Workbench Remote Alarm Monitoring (RAM) enables the customers on-premise Workbench instance to transition/transmit a specific subset of Genesys Engage Critical and Major Alarms, externally, to Genesys Customer Care, who will then proactively create a Genesys Case and will liaise, if required, with the customer to proactively progress and resolve the issue(s); the RAM alarms can also sent to the customers mobile device via the Genesys Care Mobile App.
21	Review Workbench Troubleshooting for guidance on Workbench issues.
22	Review Workbench Options for help on Workbench

Item #	Description
	configuration options/settings.
23	<p>Review these Workbench Upgrade sections when migrating to a new release of Workbench - i.e:</p> <div><p>Warning</p><ul style="list-style-type: none">• Before commencing the Workbench upgrade - please ensure the Workbench Host(s) have 'free' at least 3 times the size of the "<WORKBENCH_INSTALL>/ElasticSearch data" directory - else the Workbench upgrade process will fail and Workbench data integrity and operation will likely be compromised.</div> <ul style="list-style-type: none">• Pre-Upgrade Steps - Windows• Primary Node Upgrade - Windows• Additional Node(s) Upgrade - Windows• Rollback - Windows• Remove old version - Windows• Pre-Upgrade Steps - Linux• Primary Node Upgrade - Linux• Additional Node(s) Upgrade - Linux• Rollback - Linux• Remove old version - Linux