

Avaya Engagement Designer Reference

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Chapter 1: Avaya Engagement Designer description

Intended audience

This document is intended for people who install, configure, and administer Avaya Engagement Designer. This document contains specific information about Avaya Engagement Designer. For an overview of Avaya Breeze[™], see *Avaya Breeze[™] Overview and Specification*. For general information about Avaya Breeze[™] snap-in deployment, see *Administering Avaya Breeze[™]*.

Overview

The Avaya Engagement Designer provides the capability to define, administer, and execute enduser customer journeys across Mobile Collaboration, Unified Communications, and Contact Center applications. Engagement Designer offers business analysts, non-technical resources, and developers the opportunity to write logical business process flows. These process flows can leverage any Avaya Breeze[™] snap-ins that have an associated palette of tasks. Engagement Designer allows users to:

- Dream Easily create complex, end-to-end communications enabled business process across both mobile collaboration and contact center applications, and leveraging a range of 3rd party applications "Snap Ins", with a single tool.
- Design Developers and business users alike can use an intuitive drag and drop GUI
 environment to build business processes. Leveraging a rich palette of tools, Engagement
 Designer can easily execute 3rd party or other processes, straight from the GUI environment,
 with no additional coding necessary.
- Deploy Easily deploy business processes that leverage built in tools from Avaya Breeze[™]including high availability, redundancy and security. Engagement Designer significantly reduces cost and time to market associated with highly custom CTI middleware development.

Features

Business Process Model and Notation (BPMN 2.0)

The Avaya Engagement Designer supports BPMN 2.0. The gateways and events in Engagement Designer are from the BPMN standard. Engagement Designer supports Pools and Lanes, BPMN constructs that segment and clarify the different processes and participants of the WFD.

Compatible with other snap-ins

Avaya Engagement Designer makes it possible to send emails or SMS (text) messages, or schedule a conference using other snap-ins. Tasks are available for download in support of other purchasable snap-ins, for example, Avaya Context Store Snap-in, Avaya Real-Time Speech Snap-in, Avaya Work Assignment Snap-in or Avaya Oceana[™] Solution.

Dynamic tasks

Program your own unique tasks to be used in Engagement Designer to meet your business workflow requirements. You can add your tasks to an existing drawer on the Engagement Designer palette, or create a new drawer for your tasks. For instructions about how to create dynamic tasks, see *Creating Dynamic Tasks for Avaya Engagement Designer*.

Workflow definition templates

Sample workflow definition (WFD) templates are available on Avaya DevConnect. Two example samples are Whitelist and WhiteGlove. Pre-created templates are available directly from the Engagement Designer interface as well. You can also save your existing workflows as templates for future development.

Archiving workflow definitions

You can create an archive of WFDs that are completed or have failed. The archive does not include WFDs that are not deployed. See the *Avaya Engagement Designer Developer's Guide* for procedures and additional details.

High availability

When a failure occurs on Avaya Breeze[™] while a workflow is handling a call, Avaya Breeze[™] reconstructs the call and media associated with the call, and passes them on to another node in the same cluster. The corresponding workflow instances are reconstructed on the new node, thereby resuming the flow from that point.

Context-sensitive help

Context-sensitive help is available with the click of a button directly from the task you are using.

Engagement Designer SDK

The Engagement Designer SDK is available for download from the Avaya DevConnect website.

New in this release

With this release Avaya Engagement Designer provides the following new features:

- Two new tasks are available from the palette. For additional information, see the task
 descriptions in the associated help system or the Avaya Engagement Designer Developer's
 Guide.
 - The Interactive Voice task is available from the Media Communications drawer.
 - The Error task is available from the Integration drawer.
- Pre-created templates are now available to help you create workflow definitions. Additionally, you can to save workflows you have created as templates.
- The task properties pane displays in a separate browser window on the canvas. This allows navigation through the workflow with the task properties displayed.
- An improved interface allows for greater ease in creating workflow routing rules. For additional information, see *Avaya Engagement Designer Developer's Guide*.
- Routing rules now replace Service Profiles as the method for routing calls to users. Service Profiles translate automatically into routing rules when you install Avaya Engagement Designer.

Chapter 2: Interoperability

Interoperability

Avaya product requirements

- Avaya Breeze[™] 3.3.1
- Avaya Aura[®] Media Server 7.8 Required for use with playing announcements, collecting digits, and some other features.

Software requirements

The supported internet browsers are:

- Firefox version 33 or later
- Chrome version 53 or later
- Internet Explorer version 11 or later
- Safari version 5.1 or later

Note:

The computer used to access Engagement Designer must be able to resolve the Avaya Breeze FQDN to the IP address of the Avaya Breeze Security Module, and the System Manager FQDN to the primary System Manager IP address. The DNS must provide a way to translate the FQDN to IP. Forward and reverse DNS lookups are required. Contact your system administrator for assistance.

Memory allocation

Avaya Engagement Designer Release 3.3 has a minimum required memory allocation of 8 GB.

Avaya Breeze[™] disk size

The minimum Avaya Breeze[™] server disk size for Avaya Engagement Designer is 100 GB.

Other snap-ins

Engagement Designer can also be used with other Avaya Breeze[™] snap-ins. Compatible snap-ins include:

- · Email connector
- · SMS connector
- · Eventing connector
- Scopia connector

- Call Event Control
- Zang Cloud

Purchasable snap-ins include:

- · Avaya Context Store Snap-in
- Avaya Work Assignment Snap-in
- Avaya WebRTC Snap-in
- Avaya Real-Time Speech Snap-in

Chapter 3: Licensing

Snap-in licensing

Avaya Breeze[™] snap-ins are separately purchasable from Avaya. They are not included with Avaya Breeze[™]. Each licensed snap-in requires its own license file. Activate and download the file from PLDS and install it on System Manager WebLM.

A single license file supports the current version of the snap-in and all previous versions. For every major release of the snap-in, the snap-in requires a new license file. For this reason, different versions of the snap-in might be in different license modes.

Avaya provides a 30–day grace period from the time a license error is first detected. When the error is detected, the snap-in enters license error mode and a major alarm is raised but the snap-in remains fully functional. This provides enough time to fix the error before the snap-in stops working. You can view the **license mode** of the snap-in on the Avaya Breeze[™] Service Management page. The license modes are:

- Normal No license error is detected. Indicated by a green check mark on the Service Management page.
- Error There is a license error, but the snap-in continues to operate normally. Indicated by a yellow caution icon on the Service Management page. The Service Management page also shows the date when the 30-day grace period expires. Avaya Breeze[™] raises a major alarm when the snap-in enters license error mode.
- Restricted There is a license error, and the 30-day grace period has expired. Indicated by a
 red cross mark on the Service Management page. The snap-in automatically uninstalls. Avaya
 Breeze[™] raises a critical alarm when the snap-in enters license restricted mode. To correct this
 problem, you might need to get a license file if you don't have one, or update to a license file
 for the new major release.

Chapter 4: Upgrading

Upgrading Engagement Designer checklist

Follow the steps in this checklist to upgrade Engagement Designer to Release 3.3.

No.	Task	Description	~
1	Ensure that Avaya Aura® Media Server has been upgraded to release 7.8.	Avaya Aura® Media Server is required to play announcements. The Nuance server must be set up for TTS if using text-to-speech.	
2	Back up the Engagement Designer cluster databases.	This step is required only if you will be using an OVA to upgrade Avaya Breeze [™] .	
		See <u>Backing up the cluster databases</u> on page 15.	
3	Ensure that Avaya Breeze [™] has been upgraded to release 3.3.1. including all required patches.	See Upgrading Avaya Breeze [™] .	
4	Download the Engagement Designer snap-in and tasks.jar file from PLDS. If you will be using Zang tasks, download the Zang Cloud snap-in and zang tasks jar file.	For additional information about downloading from PLDS, see <i>Deploying Avaya Breeze</i> [™] .	
5	Install the latest version of the CallEventControl and EventingConnector snap-ins. Set the newly installed snap-ins as the	These snap-ins are preloaded with Avaya Breeze [™] . Install them from the System Manager, Elements > Avaya Breeze > Service Management page.	
	preferred versions.	See Installing the snap-in on page 25.	
6	Uninstall the old version of the CallEventControl and EventingConnector snap-ins.	See <u>Uninstalling a snap-in</u> on page 17.	
7	Record the existing attribute configuration information for Engagement Designer.	Attributes can be viewed on System Manager at Elements > Avaya Breeze > Configuration > Attributes. On the Service Globals tab, select the EngagementDesigner snap-in.	

Table continues...

No.	Task	Description	~
8	Load the new Engagement Designer snap-in.	The snap-in name will appear as EngagementDesigner in the Avaya Aura® System Manager Element Manager user interface.	
		See <u>Loading the snap-in</u> on page 24.	
9	Install the Engagement Designer snap-	See <u>Installing the snap-in</u> on page 25.	
	in. Set the newly installed snap-in as the preferred version.	The cluster database must be enabled on the cluster where Engagement Designer is installed.	
10	Configure the Engagement Designer snap-in attributes.	See Configuring snap-in attributes on page 29.	
11	During upgrade Engagement Designer is added automatically to the Service Profiles that it uses. Verify that it is in the required Service Profiles.	Verifying that Engagement Designer is in a Service Profile on page 16.	
12	If you will be using Zang tasks, load and install the Zang Cloud snap-in.	See <u>Loading the snap-in</u> on page 24 and <u>Installing the snap-in</u> on page 25.	
13	Verify attributes for the Email Connector, SMS Connector, and Scopia Connector.		
14	Optionally verify or configure database settings.	See <u>Setting up the SQL database</u> on page 26.	
15	Restore the Engagement Designer cluster databases.	This step is required only if you created cluster database backups prior to an Avaya Breeze [™] OVA upgrade.	
		See Restoring the cluster databases on page 16.	
16	From the Engagement Designer Administration Console, upload and deploy new task bundles.	Based on the task types you are using, upload and deploy updated task bundles. Install new bundles for Communication tasks, Real Time Speech tasks, Work Assignment tasks, Context store tasks, Avaya Oceana Solution tasks, ZangCloud tasks, and Dynamic user-created tasks as needed. See Deploying task bundles on page 31.	
17	Open Engagement Designer. From the Engagement Designer Administration Console Routing tab, verify that routing rules have automatically migrated.		
18	If using Chrome for Engagement Designer, on first use delete the		

Table continues...

No.	Task	Description	~
	Chrome browser default root certificate.		
19	Uninstall your old Engagement Designer Engine.	See <u>Uninstalling a snap-in</u> on page 17.	
20	Delete your old Engagement Designer Engine.	See <u>Deleting a snap-in</u> on page 18.	

Backing up the cluster databases

About this task

Backing up the cluster databases is necessary only if you are upgrading Avaya Breeze[™] with an OVA. Otherwise the cluster database is not deleted. You can backup on one cluster and restore to another.



Note:

Windows CoreFTP server is incompatible with the Cluster Backup and Restore feature and should not be used as an archive server.

Before you begin

Place the cluster in deny service before you begin the backup.

Procedure

- 1. On System Manager in Elements click Avaya Breeze™ > Cluster Administration.
- 2. Click Backup and Restore > Configure.
- 3. Enter the backup server details.
- 4. Click **Test Connection** to verify the connection of the backup server.
- 5. Click Commit.
- 6. Select the cluster with the Engagement Designer cluster databases that you want to back up.
- 7. Click Backup and Restore > Backup.

The system displays the Cluster DB Backup page.

- 8. In the **Backup** section, select the Engagement Designer cluster databases.
- 9. In the **Job schedule** section, enter the following details:
 - In the **Backup password** field, enter a password.
 - In the Schedule Job field, select Run immediately or Schedule later.

If you select **Schedule later**, enter the appropriate details in the **Task Time**, **Recurrence**, and **Range** fields.

- Click Backup.
- 11. To monitor the status of the backup, click **Return** to go back to the Cluster Administration page. Click **Backup and Restore > Job Status**.
- 12. To cancel the backup operation, on the Backup and Restore Status page, select the backup job. Click **Cancel**.

Verifying that Engagement Designer is in a Service Profile

About this task

During upgrade Engagement Designer is added automatically to the Service Profiles that it uses. Complete this procedure to verify that Engagement Designer is in the required Service Profiles.

Procedure

- On System Manager in Elements, select Avaya Breeze™.
- 2. In the navigation pane, click **Configuration > Service Profiles**.
- 3. Click the **Name** of the Service Profile where Engagement Designer should have been added.
- 4. Verify that the Engagement Designer Name is in the Services in this Service Profile list.
- 5. If it is not, in the **Available Service to Add to this Service Profile**, click the **+** sign next to the Engagement Designer **Name** to add it.
- 6. Click **Commit** to save this service profile if you modified it, or click **Cancel** if no changes were needed.

Restoring the cluster databases

About this task

Restore can be performed on any cluster where the cluster database is enabled. Restoring the cluster database is necessary only if you are upgrading Avaya Breeze $^{\text{TM}}$ with an OVA.



Windows CoreFTP server is incompatible with the Cluster Backup and Restore feature and should not be used as an archive server.

Before you begin

You must have created a backup of the Engagement Designer cluster databases before the Avaya Breeze[™]OVA upgrade.

Procedure

- 1. On System Manager in Elements click Avaya Breeze™ > Cluster Administration.
- 2. Click Backup and Restore > Restore.

The system lists the backup and restore jobs.

3. Select a completed backup, and click **Restore**.

The system lists the clusters where the cluster database has been enabled.

- 4. Select the cluster on which you want to restore the backup, and click **Continue**.
- 5. Repeat for each database backup you must restore.

Uninstalling a snap-in

Procedure

- On the System Manager web console, click Elements > Avaya Breeze™.
- 2. In the navigation pane, click **Service Management > Services**.
- 3. On the Service Management page, select the snap-in that you want to remove.
- 4. Click Uninstall.
- 5. From the Confirm Uninstall Service pop-up dialog box, select the cluster or clusters from which you want to remove the snap-in.

Note:

You cannot uninstall a required snap-in from a cluster unless another version of the required snap-in is already installed in the cluster.

The state of a snap-in as shown on the Service Management page is the aggregated status of the snap-in installation across clusters. If you uninstall a snap-in from a cluster, and if the snap-in is in the installed state in another cluster, the status continues to display as Installed.

6. If you want to forcefully remove the snap-in, select the **Force Uninstall** check box in the same pop-up dialog box.

For a snap-in, the system displays the Call activity as part of the Activity counter on the Cluster Administration page. If you force uninstall the snap-in, the snap-in will be uninstalled immediately without waiting for the Activity counter to reach zero.

7. Select **Do you want to delete the database?** check box to delete the snap-in database.

In a normal scenario the activity drains in about two hours and the Activity Link value comes to zero. This is when the snap-in is uninstalled.

Deleting a snap-in

About this task

You must uninstall a snap-in from all the clusters before you delete the snap-in. When you delete the snap-in, the snap-in is removed from the System Manager database.

Procedure

- On the System Manager web console, click Elements > Avaya Breeze™.
- 2. In the navigation pane, click **Service Management > Services**.
- 3. On the Service Management page, select the service that you want to delete.
- 4. Click Delete.
 - **!** Important:

Verify that the service is in the **Loaded** state before you click **Delete**.

- 5. In the Delete Service Confirmation dialog box, select the **Please Confirm** check box.
- 6. Click **Delete**.

Chapter 5: Deployment

Deployment checklist

No.	Task	Description	•
1	Install and configure Avaya Breeze [™] .	See <i>Deploying Avaya Breeze</i> [™] . Avaya Breeze [™] installation requires that you provide for a minimum 8 GB memory allocation and 100 GB server disk size. When deploying the Avaya Breeze [™] OVA, select profile 1 to meet the minimum memory allocation. In your VM machine properties, increase the provisioned size of the hard disk to 100 GB. See your VM documentation for additional information on this procedure. Alternatively, if you are deploying Avaya Breeze [™] using the Solution Deployment Manager (SDM), select profile 2b. You then will not need to increase the hard disk size.	
		The Avaya Breeze [™] node where Engagement Designer is installed and System Manager must be in the same domain.	
		To use the Call Rest Service task you may need to configure HTTP Proxy settings during Avaya Breeze [™] deployment. During Avaya Breeze [™] deployment, you can also create a proxy exclusion list. The exclusion list defines domains or IP addresses where outgoing HTTP requests go directly to the destination address rather than first routing to the proxy. For more information, see <i>Deploying Avaya Breeze</i> [™] and the Call Rest Service task description in <i>Avaya Engagement Designer Developer's Guide</i> .	
2	Set up DNS server entries.	Contact your DNS server administrator to add DNS server entries for the Avaya Breeze [™] management IP address, Avaya Breeze [™] security IP address, System Manager IP address, and Session Manager security IP address. If there is no DNS server available, you must manually configure the hosts files:	
		• In the System Manager hosts file, add a host entry for the Avaya Breeze [™] management IP.	

Table continues...

No.	Task	Description	~
		 In the Session Manager hosts file, add a host entry for the Avaya Breeze[™] security IP. 	
		 In the Avaya Breeze[™] hosts file, add a host entries for the System Manager IP, and the Session Manager security IP. 	
		 In your personal computer hosts file, add host entries for the System Manager IP, and the Avaya Breeze[™] security IP. 	
		This is a prerequisite and needs to be in place before the installation.	
3	Install and configure Avaya Aura [®] Media Server.	Avaya Aura [®] Media Server is required to play announcements. See <i>Installing and Updating Avaya Aura</i> [®] <i>Media Server Application on Customer Supplied Hardware and OS</i> for initial Avaya Aura [®] Media Server installation. See <i>Deploying Avaya Breeze</i> [™] for details on configuring Avaya Aura [®] Media Server for use with Avaya Breeze [™] .	
4	Set up the Nuance server for TTS if you are using text-to-speech.	See your Nuance documentation for additional information.	
5	Download the Engagement Designer snap-in and tasks.jar file from PLDS. If you will be using Zang tasks, download the Zang Cloud snap-in and zang tasks jar file.	For additional information about downloading from PLDS, see <i>Deploying Avaya Breeze</i> [™] .	
6	Create a new cluster for Engagement Designer.	See <u>Creating a new Engagement Designer cluster</u> on page 23.	
7	Install the Engagement Designer license file.	See <u>Installing the license file</u> on page 24.	
8	Load the Engagement Designer snap-in.	The snap-in name is EngagementDesigner in the Avaya Aura [®] System Manager Element Manager user interface. See <u>Loading the snap-in</u> on page 24.	
9	Install the Engagement Designer snap-in.	See Installing the snap-in on page 25.	
10	Set up the SQL database and configure the database server profile attributes on Engagement Designer through Avaya Aura® System Manager. This procedure is optional.	See Setting up the SQL database on page 26.	

Table continues...

No.	Task	Description	~
11	Configure the Engagement Designer snap-in attributes.	See Configuring snap-in attributes on page 29.	
12	For call intercept invoked workflow definitions, add Engagement Designer to the target service profile.	Adding Engagement Designer to a Service Profile on page 30.	
13	Add Workflow Admin and Workflow Designer roles to your users.	Assigning roles to a user on page 31.	
14	If you will be using Zang tasks, load and install the Zang Cloud snap-in.	See <u>Loading the snap-in</u> on page 24 and <u>Installing the snap-in</u> on page 25.	
15	From the Engagement Designer administration console, upload and deploy task bundles.	Based on the task types you are using, upload and deploy task bundles. Install task bundles for Communication tasks, Real Time Speech tasks, Work Assignment tasks, Context Store tasks, ZangCloud, and Dynamic user-created tasks as needed. See Deploying task bundles on page 31.	
16	Install, and configure Avaya Breeze [™] email connector snap-in.	Required to use the Send Email task. See <u>Installing the snap-in</u> on page 25. For additional information, see <i>Administering Avaya Breeze</i> [™] .	
17	Install, and configure the Avaya Breeze [™] SMS connector snap-in.	Required to use the Send Txt Msg task. See <u>Installing the snap-in</u> on page 25. For additional information, see <i>Administering Avaya Breeze</i> [™] .	
18	Install, and configure the Avaya Breeze [™] Scopia connector snap-in.	Required to use the Schedule Scopia task. See <u>Installing</u> the <u>snap-in</u> on page 25. For additional information, see <i>Administering Avaya Breeze</i> [™] .	
19	If using Chrome for Engagement Designer, on first use delete the Chrome browser default root certificate.		
20	Test the Engagement Designer deployment.	To test Engagement Designer deployment, open Engagement Designer and import a sample Workflow Definition. See <i>Getting Started with Avaya Engagement Designer</i> for instructions for how to create, deploy, and test basic Workflow Definitions.	

Engagement Designer deployment

The Avaya Engagement Designer has multiple components.

Avaya Engagement Designer Engine snap-in

The Avaya Engagement Designer Engine snap-in must be installed on Avaya Breeze[™] for Engagement Designer to function. The name of this snap-in is Engagement Designer in the Avaya Aura[®] System Manager Element Manager user interface. The following procedures detail the Avaya Engagement Designer Engine snap-in deployment.

Task bundles

Installation of the Engagement Designer engine also installs the Integration tasks along with all Events and Gateways. For any additional tasks you require, you must download and deploy task bundles from the Engagement Designer Administration Console. Example task bundles:

- Communication tasks, which includes Notification, Telephony Communications, Media Communications, and Transformation tasks.
- Real-Time Speech Search Tasks (require Avaya Real-Time Speech Snap-in)
- Work Assignment Tasks (require Avaya Work Assignment Snap-in)
- Context Store Task (requires Avaya Context Store Snap-in)
- Avaya Oceana[™] Solution Tasks (require Avaya Oceana[™] Solution)
- ZangCloud tasks (require ZangCloud Snap-in)
- · Dynamic Tasks that are user created

.svar files for tasks

Some tasks require that you install additional snap-ins on System Manager:

- Send Email task Email connector snap-in
- Send Txt Msg task SMS connector snap-in
- Schedule Scopia task Scopia connector snap-in
- ZangCloud tasks ZangCloud snap-in

Workflow definition

Engagement Designer workflow definitions (WFD) are created in, and deployed through, the Engagement Designer interface. Details about workflow definitions are in *Getting Started with Avaya Engagement Designer* and *Avaya Engagement Designer Developer's Guide*.

Administration roles

To create and save Workflow Definitions (WFDs) in Avaya Engagement Designer, users must have the following roles assigned:

- · Workflow Designer
- Workflow Administrator

Creating a new Engagement Designer cluster

Procedure

- On the System Manager web console, click Elements > Avaya Breeze™.
- 2. In the navigation pane, click **Cluster Administration**.
- 3. On the Cluster Administration page, click New.
- 4. On the Cluster Editor page, for the **Cluster Profile**, select the General Purpose profile.
- 5. Enter the cluster attributes for your cluster. You can edit the default cluster attributes the system displays.

The name and the IP address of a cluster must be unique.

You cannot edit all the cluster attributes. Some attributes are read-only.

- 6. Check Enable Cluster Database.
- 7. Click the box for Is session affinity enabled?
- 8. Click the **Servers** tab to assign Avaya Breeze[™] servers to the cluster.

! Important:

Do not assign servers with different releases to the same cluster. All servers in the cluster should be running the same Avaya Breeze[™] version.

For more information on upgrading clusters, see *Upgrading Avaya Breeze*[™].

9. Click Commit to create the cluster.

The **Service Install Status** in the Cluster Administration page displays a green tick symbol after all the assigned snap-ins are successfully installed on all the servers in the cluster.

To view the Avaya Breeze[™] servers in the cluster, click **Show** in the **Details** column of the cluster. The system displays the members of the cluster, and the status of each instance in the cluster.

Click a specific Avaya Breeze[™] server to go to the Avaya Breeze[™] Instance Editor page. You can view and edit the properties of the Avaya Breeze[™] server from this page.

Note:

When you administer a new Avaya Breeze $^{\text{TM}}$ server, you must add the server to a cluster. If you do not add the Avaya Breeze $^{\text{TM}}$ server to a cluster, you cannot install snap-ins on that server.

Installing the license file

Before you begin

Download the snap-in license file from PLDS.

Procedure

- 1. On the System Manager web console, click **Services > Licenses**.
- 2. Click Install License.
- 3. On the Install License page, do the following:
 - a. Browse to the location of the snap-in license file.
 - b. Select the license file and click **Open**.
 - c. Click Accept the License Terms & Conditions.
 - d. Click Install.

System Manager installs the license file.

4. In the navigation pane, click **Licensed Products** to view the installed license.

Loading the snap-in

About this task

This task describes how to load a snap-in to System Manager from your development environment or alternate location. You can skip this step when installing a pre-loaded snap-in. Pre-loaded snap-ins are provided with the Avaya Breeze[™] Element Manager in System Manager. However, you can skip this step only if the pre-loaded snap-ins are not removed from System Manager by the administrator. If the pre-loaded snap-ins are removed, the administrator needs to reload the snap-in.

Procedure

- On System Manager, in Elements, click Avaya Breeze™.
- 2. In the navigation pane, click **Service Management > Services**.
- Click LOAD.

You can load multiple snap-ins at a time.

4. On the Load Service page, depending on the browser used, click **Browse** or **Choose File**, and browse to your snap-in file location.



You can select up to 50 files or a maximum of 3 GB files whichever limit is reached first.

5. Browse and select the snap-in (.svar) file required, and then click **Open**.

A snap-in file ends with .svar. For a snap-in that Avaya provides, the .svar file must be downloaded from PLDS.

- 6. On the Load Service page, click **LOAD**.
- 7. On the Accept End User License Agreement page, click **Accept** to accept the agreement.

When the snap-in is loaded, the **Service Management > Services** page displays the **State** of the snap-in as **Loaded**.

The system displays all .svar files that you have selected in the All Services table on the Service Management > Services page.

Installing the snap-in

About this task

Use this task to install the snap-in to a specific cluster(s).



For .svar files larger than 50 MB, schedule snap-in installation during a maintenance window.

Procedure

- On the System Manager web console, click Elements > Avaya Breeze™.
- 2. In the left navigation pane, click **Service Management > Services**.
- 3. Select the snap-in that you want to install.
- 4. Click Install.
- 5. Select the cluster(s) where you want the snap-in to reside, and click **Commit**.
- 6. To see the status of the snap-in installation, click the Refresh Table icon located in the upper-left corner of the **All Services** list.

Installed with a green check mark indicates that the snap-in has completed installation on all the Avaya Breeze[™] servers in the cluster. **Installing** with a yellow exclamation mark enclosed in a triangle indicates that the snap-in has not completed installation on all the servers.

7. To track the progress of a snap-in installation, on the Server Administration page, click the **Service Install Status** for an Avaya Breeze[™] server.

The Service Status page displays the installation status of all the snap-ins installed on that server.

8. **(Optional)** Designate the Preferred Version.

To designate a snap-in as the preferred version, you must administer the user profile.

If you want to designate the snap-in as the preferred version, do the following:

- a. Verify that the snap-in is in the installed state for the targeted cluster(s) by opening the System Manager web console, and clicking Elements > Avaya Breeze > Service Management > Services.
- b. From the **All Services** list, select the version of the snap-in you want to mark as Preferred.
- c. Click Set Preferred Version.
- d. Select the cluster(s) for which you want this to be the preferred version, and click **Commit**.
- e. Modify the existing service profile or create a new service profile using the **Advanced** option next to the targeted snap-in.

For more information, see "Creating a Service Profile".

Setting up the SQL database

About this task

This procedure for setting up the SQL database for use with Engagement Designer is optional.

Procedure

- 1. On the System Manager web console, click **Elements > Avaya Breeze**.
- 2. In the left navigation pane, click **Configuration > JDBC Provider**.
- 3. Click New.
- 4. Specify the details for the **Name** and **Class Name** fields.
- 5. Browse to the jar file location and give a short description in the **Description** field.

Download the jar file that is compatible with your database version. Download this file from the database vendor website.



Do not use incorrect or incompatible jar files.

6. Click Commit.

A snap-in with this provider name is created

- 7. Install the snap-in that was created.
- 8. Go to System Manager > Avaya Breeze > Configuration > JDBC Source.
- 9. Click **New** and enter the details for creating the data source.

Specify a unique JNDI name for the data source.

10. Create a JDBC data source with the provider you just created.

Related links

Configuration examples for database servers on page 27

JDBC Provider Editor field descriptions on page 28

JDBC Data Source Editor field descriptions on page 28

Configuration examples for database servers

	PostgreSQL	MySQL	MS SQL	Oracle
JDBC Provider - Class name	org.postgresql.xa.P GXADataSource	com.mysql.jdbc.jdb c2.optional.MysqlX ADataSource	com.microsoft.sqlse rver.jdbc.SQLServe rXADataSource	oracle.jdbc.xa.client .OracleXADataSour ce
JDBC Provider - Jar File	postgresql-9.2-1003 -jdbc4.jar	mysql-connector- java-5.1.29.ja	sqljdbc41.jar	ojdbc7.jar
JDBC Source - URL	jdbc:postgresql:// (host):(port)/ (database_name)	jdbc:mysql://(host): (port)/ (database_name)	jdbc:sqlserver:// (server_name): (port)	jdbc:oracle:thin:@// (host):(port)/ (service_name),jdb c:oracle:thin:@(host):(port):SID, etc.
JDBC Source - Validation Query	select 1	select 1	select 1	select 1 from dual
JDBC Source - Custom Properties	Name: databaseName; Value: <the database="" name=""> Name: generateSimple ParameterMetad ata; Value: true Name: searchpath; Value: <the name="" schema=""> Name: serverName; Value: <the address="" db="" fqdn="" ip="" or="" server's=""> Name: portNumber; Value: <the db="" number="" of="" port="" server="" tcp="" the=""></the></the></the></the>	Name: generateSimplePar ameterMetadata; Value: true	Name: generateSimple ParameterMetad ata; Value: true Name: instanceName; Value: <the instance="" name="" sql=""> Name: databaseName; Value: <the database="" name=""></the></the>	Name: generateSimplePar ameterMetadata; Value: true

For the MS SQL server, you must install sqljdbc_xa.dll and enable the XA Transactions on the server side. See your IBM documentation for additional information.

In the case of the PostgreSQL server, on the server side, the "max_prepared_transactions" property in the postgresql.conf file must have a non-zero value. After this value is set, restart pg server. Use the command pg_ctl or just reboot the PC/server.

Related links

Setting up the SQL database on page 26

JDBC Provider Editor field descriptions

Name	Description
Provider	The name of the JDBC provider
Class Name	The name of the class file in the jar.
Select Jar File	The jar file that contains the JDBC drivers. Select Browse to upload the jar file from your local computer. **Note: Verify the jar file before uploading it. Verify the file using the command jar tf <filename file="" jar="" of="" the=""> or by opening the jar file using WinZip.</filename>
Description	The description for the JDBC provider.

Button	Description
Commit	Adds the JDBC provider or saves the changes to the JDBC configuration.
Cancel	Cancels the add or edit action.

Related links

Setting up the SQL database on page 26

JDBC Data Source Editor field descriptions

Name	Description
Name	The name of the JDBC data source.
TLSEnabled	The check box that indicates whether the JDBC data source uses TLS-secured communication.
Cluster	The cluster on which the snap-in using the JDBC data source is installed.

Table continues...

Name	Description
JDBC Provider	The JDBC resource provider used for the data source. Select the JDBC provider from the list of the uploaded JDBC providers.
JNDI Name	The JNDI name for the data source.
URL	The database URL for which the data source is created.
User Name	The database server user name.
Password	The database server password.
Validation Query	The validation query for the data source. This is the query that is tested when you click Test Connection for a data source.
Description	The description for the data source.

Custom Properties

Add custom attributes for your data source by using this section. Click the + symbol to add an attribute. Click the - symbol to delete an attribute.

Name	Description
Name	The name of the custom attribute that you want to add for the data source.
Value	The value for the custom attribute.

Button	Description	
Commit	Adds or edits the JDBC data source.	
Cancel	Cancels the add or edit action.	

Related links

Setting up the SQL database on page 26

Configuring snap-in attributes

About this task

Some configurations will need to adjust the attributes associated with the Avaya Engagement Designer.

Procedure

- 1. On System Manager, navigate to **Elements > Avaya Breeze > Configuration > Attributes**.
- 2. Select the Service Globals tab.
- 3. From the Service drop-down menu, select the EngagementDesigner snap-in.

- 4. Enter or modify attributes you want to use.
 - a. Click Override Default by the attribute you want to change.
 - b. Enter the new value in the Effective Value field.

You can restore the default by clearing the Override Default box.

Note:

You must configure **Completed instance to be deleted or not** and the attributes to define the purge intervals. If you need to delete the completed instances set the **Completed instance to be deleted or not** attribute to True. A system will get bogged down without a proper frequency of deletion.

The **Completed instance to be deleted or not** attribute should be set to true if running load.

Also note that if you are going to use a Read From DB or Update DB task in your Workflow Definition (WFD), you must select a Database Profile ID. For more information, see *Avaya Engagement Designer Developer's Guide*.

5. To save your changes, click **Commit**.

Adding Engagement Designer to a Service Profile

About this task

For call intercept invoked workflow definitions, you must add Engagement Designer to the Service Profile of the user/phone number that triggers the WFD.

Before you begin

If the user does not already have a Service Profile, create one. For more information, see *Administering Avaya Breeze*[™].

Procedure

- On System Manager in Elements, select Avaya Breeze™.
- 2. In the navigation pane, click **Configuration > Service Profiles**.
- 3. Click the **Name** of the Service Profile where you want to add Engagement Designer.
- 4. In the **Available Service to Add to this Service Profile**, click the **+** sign next to the Engagement Designer **Name**.
- 5. Click **Commit** to save this service profile.

Assigning roles to a user

About this task

Assign roles to users who create Workflow Definitions.

Procedure

- 1. On System Manager in **Users**, select **Groups and Roles** > **Roles**.
- 2. Expand the System Administrator folder and click the Workflow Administrator role.
- 3. In the Workflow Administrator window, select **Edit**.
- 4. Click the **Assigned Users** tab and click **Select Users**.
- 5. Select users to assign to this role and click **Commit**.
- 6. Repeat for the Workflow Designer role.

Deploying task bundles

About this task

You must deploy task bundles for any tasks you want to use, with the exception of the Integration tasks, which are automatically deployed with Engagement Designer.

Procedure

- Click Admin Console on the toolbar to access the Engagement Designer administration console.
- 2. On the **Bundles** tab, click **Upload Bundle**.
- 3. Click **Choose File**, navigate to the location where you have saved the task bundle, and select the bundle jar file.
- 4. Click **Open**, and then click **Upload**.
- 5. When the task bundle has uploaded to the console, click the checkbox in front of the bundle.
- 6. Click Deploy Bundle.

The tasks deploy to Engagement Designer. Yes appears in the Deployed column in front of the task bundle. You may need to reload the Engagement Designer web page to view the added tasks.

From the administration console you can also elect to delete a bundle, undeploy a bundle, or download a bundle to an alternate location.

Undeploy Engagement Designer

If you want to undeploy Engagement Designer you must:

- · Delete all WFD instances.
- Delete the Engagement Designer engine from System Manager.

Deleting Workflow Instances

About this task

Use this procedure to delete a Workflow Instance (WFI) or to purge all WFIs.

Procedure

- 1. Click **Admin Console** on the toolbar to access the Engagement Designer administration console.
- 2. To delete one or multiple WFIs, on the **Instances** tab, click the checkbox of the WFIs that you want to delete.
- Click Delete.
- 4. Click **OK** to confirm the deletion.
- 5. To purge all WFIs, on the **Instances** tab, click **Purge All**.
- 6. Click **OK** to confirm the purge.

Deleting a snap-in

About this task

You must uninstall a snap-in from all the clusters before you delete the snap-in. When you delete the snap-in, the snap-in is removed from the System Manager database.

Procedure

- 1. On the System Manager web console, click **Elements > Avaya Breeze**™.
- 2. In the navigation pane, click **Service Management > Services**.
- 3. On the Service Management page, select the service that you want to delete.
- 4. Click Delete.

! Important:

Verify that the service is in the **Loaded** state before you click **Delete**.

- 5. In the Delete Service Confirmation dialog box, select the **Please Confirm** check box.
- 6. Click Delete.

Chapter 6: Geo-redundancy

Geo-redundancy description

Engagement Designer does not provide automatic data replication between data centers for workflow definitions (WFDs) and workflow instances (WFIs). To ensure that a disaster recovery site can take over Engagement Designer functionality, the site must have the same WFDs saved and deployed. In the event of an outage at the main site, the disaster recovery site can be brought up and new WFIs created so that the same services are provided.

In the case of a failure:

- Real-time contacts that are being processed by Engagement Designer drop.
- Non real-time contacts are cleaned up and re-queued when the disaster recovery site comes into service.

Chapter 7: Performance

Capacities

- 4200 Workflow Instance (WFI) limit per cluster
- 100 Workflow Definition (WFD) limit per cluster

Memory allocation

Avaya Engagement Designer Release 3.3 has a minimum required memory allocation of 8 GB.

Avaya Breeze[™] disk size

The minimum Avaya Breeze[™] server disk size for Avaya Engagement Designer is 100 GB. In your VM machine properties, increase the provisioned size of the hard disk to 100 GB. See your VM documentation for additional information. Alternatively, if you are deploying Avaya Breeze[™] using the Solution Deployment Manager (SDM), select profile 2b. This will eliminate the need to increase the disk size.

Chapter 8: Maintenance

Logs

Avaya Breeze[™] provides a separate log file for Engagement Designer. The file includes both Workflow Engine and Workflow Definition logs. If more than one version of Engagement Designer is installed, all logs are stored to the same file. This file is located at: /var/log/Avava/services/ EngagementDesigner/

You can modify the logging level for Engagement Designer snap-ins on the System Manager Avaya Breeze[™] **Logging Configuration** page. The default logging level is INFO. For more information, see Maintaining and Troubleshooting Avaya Breeze[™].



Caution:

Setting the logging level for Engagement Designer to levels other than 'WARN, ERROR, INFO or OFF' will have an adverse effect on system performance.

Alarms

Overview

The Engagement DesignerWorkflow Engine (WFE) raises alarms for various events.

Table 1: Engagement Designer Alarms

Event Code	Message	Condition	Resolution
ACD0001	Snap_in_installed/ uninstalled event subscription failed for WFE <name></name>	A subscription to a snap-in install event failed.	Contact the Avaya support team
ACD0002	Runtime event subscription failed for WFD <name>. Event is: <event type=""></event></name>	A subscription to a runtime event failed for a workflow definition (WFD).	Contact the Avaya support team

Table continues...

Event Code	Message	Condition	Resolution
ACD0003	Event subscription failed: eventing system is not ready.	A subscription fails because the eventing system is not ready after 3 retries.	Contact the Avaya support team
ACD0004	User is trying to delete all artifacts in Gigaspace.	A workflow instance (WFI) could not be found in the database (null is returned) based on an instance id, so a user is trying to delete a non-existent instance.	Refresh the screen
ACD0005	User is trying to get to non existent workflow.	A WFD could not be found in database (null is returned) based on a WFD name version.	Check the workflow name and version

Event subscription failures

When WFE subscribes to events and the subscription fails, an alarm is raised.

WFE subscribes to Runtime event on behalf of a WFD during WFD deployment on Designer or after WFD installation through SMGR.

WFE subscribes to SNAP_IN_INSTALLED and SNAP_IN_UNINSTALLED System events when WFE is starting up.

WFD deployment on Designer will fail if event subscription fails.

WFD will not be stored in data grid after installation through SMGR if event subscription fails.

Displaying alarm messages

On the Avaya Breeze^m server, the alarm messages can be found in the *event.log* file at /var/log/ Avaya/services/.

The alarm can also be viewed on the System Manager at **Home > Services > Events > Alarms**.

User created alarms

An alarm not listed here could be a user created alarm. Users can create alarms using a task in a Workflow Definition as described in the *Avaya Engagement Designer Developer's Guide*.

Chapter 9: Additional Resources

Documentation

See the following related documents at https://support.avaya.com.

Title	Description	Audience
Avaya Engagement Designer Reference	Provides a functional description of Avaya Engagement Designer as well as administration, deployment, security and	Sales engineers Developers
	maintenance. Includes interoperability, performance, and design considerations.	System administrators
		Services and support personnel
Getting Started with Avaya Engagement Designer	A guide through the core steps to create a Workflow Definition.	WFD developers
Avaya Engagement Designer Developer's Guide	Describes detailed steps and concepts to create and deploy different types of Workflow Definitions.	WFD developers
Creating Dynamic Tasks for Avaya Engagement Designer	Describes how to create user-defined tasks for Avaya Engagement Designer.	WFD developers
Quick Start to deploying the HelloWorld Snap-in	Walks through the steps to install and	Developers
	administer the Hello World snap-in.	System administrators
Administering Avaya Breeze [™]	Provides the procedures to administer and configure Avaya Breeze [™] and snap-ins.	System Administrators
		Services and Support personnel
Maintaining and Troubleshooting Avaya Breeze [™]	Contains the list of alarms and errors related to Avaya Breeze [™] and the procedures to	System Administrators
	troubleshoot and fix the problems.	Services and Support personnel
Implementing and Administering Avaya Aura [®] Media Server	Provides the procedures to install, configure, use, and troubleshoot Avaya Aura® Media	System administrators
	Server.	Services and support personnel

Avaya DevConnect

Avaya DevConnect provides additional resources for Engagement Designer developers. You can access documentation, videos, webinar recordings, tier 1 and tier 2 support as well as a developer forum. You can also download the Engagement Designer SDK from the DevConnect website. View the Engagement Designer DevConnect website at: DevConnect: Avaya Engagement Designer.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

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