



Uptivity WFO Cumulative Change Guide, v5.7

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Uptivity WFO offers inContact customers a choice of deployment options. For more information about WFO for premise or hybrid environments, visit www.Uptivity.com. To learn more about WFO in the cloud, visit www.incontact.com.

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Introduction

Audience

This document is written primarily for personnel at inContact and our enabled partners who work with Uptivity WFO. It may also be useful for customers considering an upgrade of their Uptivity WFO system.

Goals

The goal of this document is to provide a high-level overview of features added, changed, and removed during the period from v4.5 until the present day. Each section lists only the differences specific to that version. Uptivity WFO includes:

- Uptivity Call Recording
- Uptivity Quality Management
- Uptivity Desktop Analytics
- Uptivity Screen Recording
- Uptivity Survey
- Uptivity Speech Analytics
- Clarity WFM

Assumptions

This document assumes the reader has access to manuals, guides, and release notes for previous versions of Uptivity WFO, and can refer to these for a more comprehensive discussion of product functionality.

Need-to-Knows

Product names have undergone minor changes due to company rebranding as Uptivity (effective with v5.3), company acquisition by inContact (effective with v5.5), and product rebranding (beginning with v5.6).

From v4.5 to v5.0 (release date 02 April 2012)

New Customer-Facing Features

- **cc: Clarity** – A new product to the cc: Discover suite, Clarity is a web-based workforce management tool that can be used to forecast contact center call volumes, build optimized employee schedules and staffing plans, and display real-time adherence and status information about your employees.
- **Security Roles** – Previous versions of Discover assigned permissions to each user account. With the new Roles feature, users can specify permissions for a Role and assign that Role to one or more users. Users also can be assigned multiple roles. This feature improves security by standardizing permissions management, while also reducing administration costs.
- **Thales ISS nShield Encryption Key Management support** – Keys created with CallCopy's cc_crypt.exe can be used with Thales ISS nShield hardware security modules for encrypting and decrypting files.
- **Improved cc: Voice recording failover modes (Buddy Cores)** – Improved resiliency feature that eliminates the need for having duplicate recordings and bypasses the limitations of some recording methods. Uses two recording cc: Voice Cores, a primary and secondary. The secondary runs in standby mode and monitors the primary. If the primary fails, the secondary detects the failure after a defined time and automatically starts recording.
- **Service Manager Resource Monitoring** – This feature was redesigned for easier deployment and use. The Service Manager now displays the current CPU and Memory usage for each managed service.
- **Enhanced Auditing** – This function now tracks forty events including user creation, user changes, role changes, and password changes. Messages are easier to understand and location tracking has been improved with this update.
- **Fixed Content Storage (XAM) support** – Records can now be archived to Fixed Content Storage systems that support the XAM API.
- **Avaya SMS integration support**
- **Avaya Proactive Contact v5.0 support**
- **Siemens OpenScape Contact Center v8.0 support**

New Under-the-Cover Features

- **New Database installer** – Database installation is now a separate process. This new process includes detailed logging, better error handling, and the ability to save install options for automated deployment.
- **Database redesign** – cc: Discover now uses two databases, one for user information shared across all CallCopy products, and a second for system and other data. Database structure has been redesigned for optimized transaction speeds and increased capacities. The cc: Clarity product is designed to use a third database for schedule, forecasting, and other workforce management data.

Functionality Changed or Removed

- **Agent accounts converted to user accounts** – Earlier versions of Discover allowed for the creation of both user and agent accounts, with the latter having limited default permissions. Now, all accounts are user accounts, and permissions are assigned through roles. This change simplifies and standardizes user administration in order to improve security permissions.
- **Web Portal Active Directory changes** – Users with AD accounts and correct permissions can login to cc: Discover and have Discover accounts created automatically the first time they login. Security roles can also be assigned to the user based on AD group memberships. This function eliminates the need for manually creating the accounts.
- **Redesign of Web Portal Administration tab** – Administration functions have been grouped into settings-specific menus (e.g., Permissions, Recorder Settings, Web Portal Settings).
- **Discontinued support for legacy cc: Discover player.**
- **Discontinued support for legacy Channel maps.**

Software Support Changes

System Servers

- **Microsoft SQL:** SQL 2008 Server R2 is now supported with SP1.
- **Web Server:** Microsoft Internet Information Services (IIS) 7.5 is now supported with ASP.NET 4.0 Extensions

Client Workstations

- **Web Browsers:** Mozilla Firefox now supported for versions 3.0 – 11.

Upgrade Notes

Due to database design changes made for v5.0, customers must be running v4.5 in order to upgrade. Customers running v4.4 or earlier must first upgrade to v4.5 and then upgrade to v5.0. There is no software cost for migrating to v4.5 as part of the upgrade.

From v5.0 to v5.0 SP1 (release date 17 September 2012)

New Customer-Facing Features

- **Survey Linking:** This new feature in cc: Survey adds a column to the Web Player Call List for **Survey Score**. When a call is received by cc: Survey, it looks up the data for that call via TSAPI, locates the ORI_UCID (Original UCID) call identifier for the call, and then does a lookup on the Recordings table in the database to see if it locates a recording with the same UCID. If found, cc: Survey adds the survey score to the record. The feature must be configured correctly and a compatible integration must be in place (currently only TDM Survey with Avaya TSAPI is supported).
- **New Survey Reports:** New reports allow you to view survey scores:
 - **By Agent:** This report allows you to select a set of agents over a specific date range, and displays the number of surveys completed for each agent, given survey score, total possible points, percentage overall score, and totals for each column.
 - **By Question:** This report provides a count of each given response to each of the questions in a survey form.
 - **By Response:** This report allows users to identify the relationship between a response to one question and the responses to other questions.
- **Integration with Cisco Media Sense:** This integration supports the copying of call recordings from Media Sense for Quality Management using cc: Discover. The integration also supports live monitoring of agents and agent desktop screen capture.
- **Mitel: SRC Load Balancing/Failover Support:** This enhancement allows cc: Discover to record calls after a phone has changed Mitel SRC registrations. Phones can change registrations if an SRC fails or for load balancing.
- **cc: Fusion Server:** This server is used to manage deployment and updates of scripts for cc: Fusion desktop applications. Multiple scripts can be stored on the server and tailored to meet the needs of different user groups. Previously, system administrators had to push scripts to clients. Now, clients check the server for the latest script and download it. This method reduces administration time and costs and makes script changes quicker. A new "Fusion Administration" permission has been added to the system to control which users can load scripts into the system.

- **Authentication using Active Directory:** Additional fixes and design changes have been applied to this feature, which was new in Discover v5.0. AD authentication is now more secure as users are required to be authenticated by AD each time they open Discover, not just when they login to their PC. Also, there is no delay between when users are created in Active Directory and the Active Directory Sync module duplicates the account in Discover (groups and roles do not sync during this process). Settings that were placed in configuration files have been moved to the web portal, making administration easier to understand. Additional considerations apply. Refer to the Release Notes for v5.0 SP1 for additional details.

New Under-the-Cover Features

- **API Commands Added:** The following functions were added to the API Server:
 - **CALLLIST:** This function returns a list of call recording records that match criteria passed to it.
 - **RECORDSTART:** This function works similarly to the CALLSTART function. It starts a recording of a call if the call is not being recorded or if the call is already being recorded. In the latter case, the result is a recording of a segment of a call. Call records for recordings created through this function have the same information as a record for recordings invoked via the CALLSTART function. At this time this function is available only in Cisco BiB telephony environments.
 - **RECORDSTOP:** This function works similarly to the CALLSTOP function. It stops a recording started via the RECORDSTART function. At this time this function is available only in Cisco BiB telephony environments.

Functionality Changed or Removed

- **Discontinued support for single sign-on with Active Directory:** This feature was removed as part of the AD authentication redesign. At this time there is no plan to offer this feature again.
- **API Commands Deprecated:** The following functions were deprecated from the CallCopy API Server:
 - **EXTENSIONPLAYBACKSTART**
 - **EXTENSIONPLAYBACKSTOP**

Software Support Changes

- **Web Browsers:** Internet Explorer 9 now supported in Compatibility mode.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

From v5.0 to v5.1 (release date 21 February 2013)

New Customer-Facing Features

- **cc: Discover Dashboards:** A widget-based dashboard framework that allows users to build customized views of data across multiple products on a single page. New widgets can be downloaded from the CallCopy Customer Portal and installed by users into their system.
- **Redesigned Web Player Interface:** The Web Player interface has been redesigned for ease of use and easier visibility/management of data layers including speech analytics tags, bookmarks, crosstalk/silence, and blackout areas. Screen capture playback interface and data layer details panes have been improved. Interaction zooming allows for greater control over the display of data for longer duration interactions.
- **Improved voice recording failover recovery:** Simplified recovery from backup recorders to primaries after a failover.
- **Cisco Contact Center Directory Syncing:** Users, Groups (Teams), agent number/extension assignments can all be automatically synced from Contact Center Express and Enterprise directories. Provides simplified user management and assists in automating onboarding and offboarding processes.
- **Automatic After Call Work (Wrap) Screen Recording Management:** Recording schedules can now be configured to automatically terminate ACW/Wrap screen recording when the next recording for an agent begins. This was the top-voted feature request from the CallCopy CONNECT 2012 user conference.
- **Live Monitoring from cc: Clarity Real Time Roster:** Customers that have both cc: Clarity and voice/screen recording with cc: Discover can now initiate live monitoring sessions directly from the cc: Clarity Real Time Roster page.
- **cc: Clarity Schedule Adherence Reporting:** New historical view reporting of what happened during a shift when compared to activities actually scheduled. This is used to see how well your staff is following the predetermined optimal shifts.
- **cc: Clarity Bulk Schedule Removal:** Remove schedules from cc:Clarity that have been previously published. This allows for schedulers to make bulk changes in just a couple of clicks and publish new schedules based on updated data and scenario's impacting the contact center.
- **cc: Clarity Bulk Calendar Management:** Ability to schedule a meeting, training, or other activity for a group, location, team. Instead of having to edit each schedule one by one, our system makes creating schedule additions for many people at once.

- **cc: Clarity PTO Blackout Dates:** Allows for blacking out of days for PTO requests based on certain thresholds. During certain times of the year, a high number of requests come in for PTO. The administrator can select a number of individuals who are allowed to request PTO before blacking out the day on the calendar.
- **cc: Clarity New Real-Time/Historical Data integration support:** The following platforms are now supported for real-time and historical data feeds:
 - ShoreTel Contact Center 7/8
 - Avaya CMS 'CLINT' Interface
 - Cisco Unified Contact Center Express

New Under-the-Cover Features

No significant back-end changes were made in this version.

Functionality Changed or Removed

No other significant functionality was changed or removed in this version.

Software Support Changes

System Servers

- No changes in this version.

Client Workstations

- **Web Browsers:** Mozilla Firefox now supported for versions 3.0 – 11.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

From v5.1 to v5.2 (release date 31 May 2013)

New Customer-Facing Features

- **Ad Hoc Reporting:** Enables users to analyze data and create custom, reusable reports. Users control the data in a report and how the data appears. Reports can be displayed in RDL format with capability to export to Excel, Word, and PDF. Reports can also be displayed in interactive HTML format for in-app presentation. Data from recordings, quality management, workforce management, Voice of the Customer surveys are all available as data sources.
- **QM Evaluation Dispute Process:** Administrators now have the option of allowing agents to dispute evaluation scores electronically via an arbitration system built into evaluation forms. Evaluators can select third party arbitrators in the system. All dispute status history and comments are tracked and delivered via the Assignment Inbox feature.
- **Forecasted Volume Editor:** When viewing historical call volume data in the acquisition step of forecasting, you now have the ability to modify call volumes over multiple call volumes (up to one month in a single operation). Call volumes can be modified across multiple skills simultaneously. Users have the option of modifying volume by raw number or percentage.
- **Leave status displays for agents in Real-Time Roster:** When viewing the Real-Time Roster, users will now be able to identify agents that were originally scheduled, but now have updated schedules due to a Leave Request or Call-Off. The type of Leave Request or Call-Off will display in the 'Scheduled' column on the Roster view.
- **Incremental Leave Requests:** PTO is now broken down in to 15 minute increments as opposed to the entire block of time included in a scheduled shift. Associates are no longer forced to request an entire shift off of work as they can more specifically target the time they need to be away from work. Configurability allows for organizations that represent PTO in smaller increments to accurately represent the amount of PTO allocated and used by its associates.
- **Mass Shift adds in Overview Report:** Enhanced functionality allows users to add a single shift to multiple schedules. Shifts can be added to existing schedules after publication.

New Under-the-Cover Features

- **Database Consolidation:** Data for cc: Discover and cc: Clarity has been combined into a single database. During an upgrade, the database installer for v5.2 both upgrades and combines the existing databases into the new consolidated structure.

Functionality Changed or Removed

- **QM Evaluation Text Boxes:** Limits have been placed on the special characters that can be used in free-form text boxes on evaluations. Only the following characters may be used without generating an error: percent signs (%), parentheses, hyphens, commas, and periods. In addition, these fields are limited to 1,024 characters (including spaces).

Software Support Changes

System Servers

- No changes in this version.

Client Workstations

- No changes in this version.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

From v5.2 to v5.3 (release date 09 December 2013)

New Customer-Facing Features

- **Projected Over/Under Staffing and Service Level Reporting:** Clarity by Uptivity now offers the ability to view projected over-staffing, under-staffing, and service levels during schedule creation when using forecast data. Clarity will run simulated, forecasted call data through generated schedules to allow users to identify gaps and make adjustments to staffing prior to schedule publication.
- **Achievements:** Managers can set up automatic and ad hoc point-bearing awards that motivate and reward agents for improving individual, team, and center performance. Individual and team achievements are communicated via email alerts and dashboard widgets displayed on agent desktops.
- **Saving In-Progress QA evaluations:** Evaluators can start evaluations, save them, and return at a later time to complete the evaluation. Other evaluators can also complete in-progress evaluations if needed. The Start and Completed Dates enable users to employ ad hoc reporting to track whether evaluations are being completed in a timely manner.
- **Enhanced Ad Hoc Reporting:** Users can now create matrix reports and line graphs to show trends across time periods (e.g., days, weeks, months). Additional data fields include QA Score %, Survey Score %, and QA Review process data (e.g., arbitrators, Questioned Count, Disputed Count, Score Changes).
- **Speech Analytics Ad Hoc Reporting:** Users can now design custom speech analytics reports using additional data fields and search criteria. This feature provides greater insight into agent behavior and call activity by enabling exploration of the data.
- **Call Segments:** Users can now easily listen to a caller's complete interaction. If the caller was transferred to several agents, the user can find all associated recordings. Currently only supported in the Avaya TSAPI integration.
- **Active Directory Multiple Domain Support:** Customers that authenticate via Active Directory can now configure Discover to work with multiple domains, simplifying user management.
- **Cisco JTAPI Integration Support:** Uptivity now supports integration with Cisco Unified Communication Manager using the Cisco JTAPI client in addition to the previously supported TAPI client.
- **Zeacom Contact Center WFM Integration Support:** Clarity by Uptivity now supports integration with Zeacom Contact Center for real-time and historical reporting.

New Under-the-Cover Features

- **Info Broker Service:** This new service allows for greater system growth, expandability, and scalability by splitting the Web Media Server's tasks between it and the Info Broker. In this way, the Info Broker can direct Live Monitor traffic and requests between components rather than sending all traffic to the Web Media Server.

Functionality Changed or Removed

No other significant functionality was changed or removed in this version.

Software Support Changes

System Servers

- **Windows Operating System:** Windows Server 2003 is no longer supported.

Client Workstations

- **Web Browsers:** Mozilla Firefox now supported for versions ESR 17 – ESR 23.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

From v5.3 to v5.4 (release date 30 April 2014)

New Customer-Facing Features

Clarity by Uptivity

- **Schedule Bidding:** This new feature allows users to create sets of schedules that employees may bid upon. User-defined ranking criteria sets allow users to award schedules to top performers based on their bids.
- **Additional Call Volume Prediction Models:** Clarity users can select one of three prediction models when generating a call volume forecast to provide the most accurate results for a given historical call volume data set.
- **Call Off Permission:** The ability for employees to use the Call Off button within Clarity can be allowed or restricted by permission. Access to the Call Off button is turned off by default.
- **Active/Inactive Agents Filter:** When viewing employees' schedules, the list of employees on the left-hand side of the screen can be filtered by whether the users' Clarity profiles are active or inactive.
- **Ad Hoc Report Field Enhancements:** Several Ad Hoc Report fields within Clarity now display user-friendly data rather than raw data from the Clarity database.
- **TASKE WFM Data Integration:** This new integration enables Clarity to support historical and real-time data feeds from TASKE's call management software.
- **Leave Request Update:** Employees may now request time off for dates in the future that have not yet been scheduled. In the absence of a scheduled shift, the request is limited to the full day.
- **Predictive Schedule Reports:** Links to completed predictive schedule reports (Over/Under, Service Level) now appear in the new Scheduler widget rather than in the Dashboard widget.

Uptivity Surveys

- **Post-Survey Linker:** This service is an additional means of linking call records and surveys. Linker can be used as a backup method if linking was not performed when Survey was first installed or a technical incident prevented the Survey engine from linking the records. It can also be used with some PBXs for which the Survey engine does not currently support linking.

Uptivity Quality Assurance, Coaching & Training

- **Arbitration:** The arbitration workflow in QA is now optional, with users able to define whether to use arbitration on a per-form basis. For customers who are upgrading, existing forms will still have the arbitration workflow enabled post-upgrade. To disable it, make a copy of the form and uncheck the 'Enable Arbitration Workflow' box before saving the new version in the form builder. The limitation of three (3) arbitrators has also been removed.
- **Save QA Form In Progress:** The 'Save' button while performing an evaluation has been renamed to 'Save as Draft' to make it more clear that the evaluation will not be committed to the system as complete.
- **Password changes:** With respect to PCI DSS 3.0 regulations, the ability for a user to change their own password has been limited to those users with the Change Password permission. Any user requiring a password reset can still click the Forgot Your Password button. However, only those with the Change Password permission will be given the ability to reset their password. Users missing this permission will receive an automated email telling them to contact a system administrator to process their request.

New Under-the-Cover Features

- **Scheduling Process Enhancements:** The Clarity scheduling process can run in the background while users continue to perform other actions within the software. Users can opt to receive notifications when the scheduling process completes via email, SMS, or the new Scheduler widget, which displays completed schedules. Enhancements to Clarity's scheduling algorithm also ensure strict adherence to business rules while improving performance during schedule optimization.

Functionality Changed or Removed

- **Allow Group Administration Permission:** In previous versions, users with this permission could only see users in their own groups. Beginning with v5.4, users with this permission can now see all users. This change allows users with this permission to see and add new members to Discover Groups they administer.

Software Support Changes

System Servers

- **Windows Operating System:** Windows Server 2012 R2 is now supported.
- **Database:** Microsoft SQL Server 2012 SP1 is now supported.
- **Web Server:** Microsoft Internet Information Services (IIS) v8.5 is now supported with ASP.NET 4.5 Extensions.

Client Workstations

- **Web Browsers:** Mozilla Firefox now supported for versions ESR 17 – ESR 26. Compatibility mode no longer required for Internet Explorer 9.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

The tested and supported database upgrade path is from Discover Suite v5.3 on Microsoft SQL Server 2008 to SQL Server 2012 SP1. Upgrade of older SQL and/or Discover version databases has not been tested.

From v5.4 to v5.5 (release date 03 November 2014)

New Customer-Facing Features

Uptivity Discover WFO Suite

- **Reporting Tool Enhancements:** Report Subscriptions have been enhanced for improved usability and can now be used with ad hoc reports. In addition, users can create Shared Schedules for generation and delivery of subscribed reports, and apply these to multiple subscriptions. Shared schedules reduce the time to configure subscriptions and assure consistent configuration.

Uptivity Discover Call Recording

- **Dynamic Channel Allocation (Avaya DMCC-MR Integration):** Previously, Discover's recording module had to be restarted to be aware of changes to DMCC-MR stations. For 24-hour call centers, this limitation made it possible to miss calls as agents' shifts ended/started. Discover now supports dynamic allocation of recording channels by reloading voice board settings without requiring a restart of the application. This is a licensed feature.
- **Voice Board Page Enhancements:** The Voice Board configuration pages in the Discover Web Portal have been redesigned for improved usability and a number of deprecated settings have been removed.
- **SIP Recorder Integration:** SIP trunks are a standard means of delivering IP telephone services and unified communications to customers with a SIP-based IP-PBX. This feature records any traffic routed over a SIP trunk. It can be implemented several ways. See **Mobile Recording – Cisco UCM**.
- **Mobile Recording – Cisco UCM:** This method allows remote or field agents to create a conference between themselves, the customer, and the SIP trunk. Discover records the trunk and, thus, the conference call. This implementation of SIP trunk recording has been tested with and is supported for Cisco Unified Communications Manager and the inContact Cloud PBX.
- **Call Segment Enhancements:** Users can now see other calls by an agent that occurred during the time period when a call with segments occurred. For example, the agent might place a caller on hold and call a supervisor or SME. That second call can now be found in the Discover call list. Also, segments now play consecutively instead of the user having to click play to move from one segment to the next. Call segments are supported only for Avaya TSAPI integrations.

Uptivity Clarity WFM

- **Employee Profile:** Employee leave requests and schedules are now available within a consolidated employee profile, providing users with a tabbed interface for navigating between different profile sections. Users may now access detailed information regarding historical and pending leave requests within an employee's profile without having to access a separate report.
- **Forecast Reporting:** A new forecast data management page allows users to review filtered lists of forecast data sets, delete unused forecasts, create a schedule from a specific forecast, and specify a prediction to be used for reporting. A forecast specified to be used for reporting will display within Clarity's historical and real-time Forecast vs. Actual Widgets as well as enable forecast versus actual reporting within Ad Hoc Reports.
- **Import Agent Ranks:** This feature allows users to import custom agent ranks to be used when awarding schedules as a part of schedule bidding. Users may manage imported agent ranks in the same way as they manage built-in agent ranking criteria sets.
- **Labor Rule Validation:** Clarity's labor rule configuration pages now offer validation to prevent users from creating conflicting labor rules that may prevent successful scheduling.
- **Leave Management Enhancements:** A new user interface for requesting time off allows users to request multiple, non-contiguous days off as well as request off unscheduled shifts in the future. Users may cancel their own leave requests via the new Employee Profile, and leave administrators may specify that a request is "Under Review" prior to processing a pending request. The "Call Off" button has been deprecated, and this type of leave is now handled via the same interface as other leave request types.
- **New and Changed Permissions:** Several permissions have been added and the behavior of some existing permissions has been changed, primarily in conjunction with the leave management enhancements. Administrators who configure user roles and accounts are encouraged to refer to the *Clarity by Uptivity Administration Manual, v5.5*, for additional information.
- **Reporting Enhancements:** see Reporting Tool Enhancements in [Uptivity Discover WFO Suite](#).

Uptivity Discover Quality Management

- **Call List Previous Filter:** This button allows the user to revert the filter to the previous settings for searching the Discover call list.

Uptivity Speech Analytics

- **Legacy Mode:** Uptivity made significant changes to the Speech Analytics services and data for Discover 5.5. Speech Analytics customers have the option of running the product in legacy mode or upgrading to the new version. Customers with more than 150 agents should discuss this issue with their sales representative and sales engineer. Customers who choose legacy mode will not have access to Speech Analytics features and enhancements developed after Discover 5.4. Customers will eventually be able to move from legacy mode to the current version as the upgrade path is more fully tested.
- **Canadian French Support:** Audio can be analyzed for Canadian French terminology. This language pack requires a license.
- **Distributed Analytics Servers:** Analytics servers can be dedicated to specific tasks: audio indexing, tag searching, and call classification. Dedicating servers to specific tasks increases the hardware needed but can improve speech analytics processing and reduce the time to identify tags.
- **Analytics Configuration Settings Pages:** Services can be configured using the Discover Web Portal Administration tab instead of using INI files.
- **Copy/Edit Tags:** Users can copy tags in order to reuse existing settings or to edit settings and phrases.
- **Tag Match Position during Call:** Users can specify if a tag phrase occurs during the beginning, end, or anywhere in a call. For example, a tag may track if an agent uses a required greeting during the first 15 seconds of a call.
- **Analytic Criterion – Discover Group:** Users can specify Discover Groups for controlling which calls are analyzed for which tags.
- **Call Classification:** This feature enables speech tags to be added to call recording records using the User1-15 fields. Those tags can be used to sort and filter calls for call review workflows. Before using this feature, customers using Uptivity Fusion Desktop Analytics MUST contact their sales representative or sales engineer. Call Classification and Desktop Analytics can write to the same User fields, potentially causing data inconsistencies.

New Under-the-Cover Features

No significant back-end changes were made in this version.

Functionality Changed or Removed

No other significant functionality was changed or removed in this release.

Software Support Changes

System Servers

- No changes in this version.

Client Workstations

- **Operating Systems:** Windows Server 2003 is no longer supported (e.g. for customers running the Web Portal from a server).
- **Web Browsers:** Google Chrome has been tested and is now supported for version 38.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

The tested and supported database upgrade path is from Discover Suite v5.3 or v5.4 on Microsoft SQL Server 2008 to SQL Server 2012 SP1. Upgrade of older SQL and/or Discover version databases has not been tested.

From v5.5 to v5.5.1 (release date 13 February 2015)

i v5.5.1 is considered an interim release. Many customers will be upgrading from a version prior to v5.5, so you should also review [From v5.4 to v5.5 \(release date 03 November 2014\)](#) in conjunction with v5.5.1 upgrades.

New Customer-Facing Features

Uptivity Clarity WFM

- **Duplicate "Device Unique ID" Notification:** Users will receive an error notification when attempting to save a user profile with a Device/Device Unique ID combination that matches another active user. The error notification displays both the name and the username of the user with the duplicate values for easy identification.
- **PTO Displays When Editing Schedules:** Approved, pending, and under review leave requests now display when editing a user's schedule within the "Schedule" tab of the user's profile to allow for easier consideration of leave requests when editing schedules.
- **Processes Report Changes:** The Processes report now displays only Pending requests by default to improve initial report loading performance and to present users with immediately actionable requests. In addition, a filter-as-you-type feature was removed from this report to improve performance and responsiveness when performing searches.
- **Email Address Requirement:** Email addresses are now required for all users. Clarity will present an error message when a user attempts to create or update a user account without an email address.

i After upgrading to v5.5.1, changes to existing users without email addresses cannot be saved until a valid email address is entered.

- **Permissions Change:** The "Can Be Supervisor" definition was moved from a permission that may be added to roles to a flag within users' profiles for more intuitive set-up. Note: during upgrade to v5.5.1, users with the "Can Be Supervisor" permission within their roles will be updated automatically with the "Can Be Supervisor" flag.

New Under-the-Cover Features

Uptivity Clarity WFM

- **Leave Management Enhancements/Fixes:** Leave request handling is now consistent throughout Clarity, regardless of whether it is accessed through an employee schedule, PTO page, the Overview report, etc. Users can no longer process their own leave requests from any point in Clarity. Leave requests can be submitted for past dates.
- **Installation Enhancements:** The SessionState timeout setting is now included in the Clarity web.config file. The installation wizard now creates separate Historical and Real-time Hub instances by default.

Uptivity Speech Analytics

- **File Level Encryption:** For customers who purchase Encryption, Speech Analytics WAV (.wav) and index (.idx) files are now encrypted in the same way as Discover audio and video files. Previously, Speech Analytics files were not encrypted.

Functionality Changed or Removed

- **Readonly User for Reporting:** In previous versions, reports were executed under the standard Discover user account. To support shared databases for inContact Discover in v5.5.1, reports are now executed using a minimally-permissioned “readonly” user to access the data source. For more information, see the appropriate Uptivity Discover Installation Guide.

Software Support Changes

System Servers

- No changes in this version.

Client Workstations

- **Operating Systems:** No changes in this version.
- **Web Browsers:** Google Chrome has been tested and is now supported for version 40.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

The tested and supported database upgrade path is from Discover Suite v5.3 or v5.4 on Microsoft SQL Server 2008 to SQL Server 2012 SP1. Upgrade of older SQL and/or Discover version databases has not been tested.

Customers who want to add Speech Analytics must upgrade to v5.5.1. Customers who want to add to an existing Speech Analytics deployment are not required to upgrade. For example, a customer who has v5.4 Discover Call Recording and QM and wants to add Speech Analytics must upgrade to Discover v5.5.1. If the same customer already had Speech Analytics and merely wanted to add 25 seats of Speech Analytics would not have to upgrade.

From v5.5.1 to v5.6 (release date 30 April 2015)

i Beginning with v5.6, inContact Discover (cloud) and Uptivity Discover (premise) are considered to be one product: **Uptivity WFO**. Changes apply regardless of deployment method (cloud/premise) unless otherwise noted.

Process/Documentation Changes

- The *Discover Web Player Manual* is now the *Discover User Manual*.
- Installer and Customer Integration Guides are no longer tied to a specific product release.
- Cloud deployments now use a shared database model. See the current *Production Deployment Guide* for new procedures.

New Customer-Facing Features

Call & Screen Recording

- **Real-Time Blackouts:** Discover can now pause and resume recording of audio and screen in real-time to prevent sensitive data from being captured. For premise-based customers, real-time blackouts are an addition to the previous method, in which Discover tagged parts of a call for blackout and then deleted the tagged section of the recording during the transcoding process. For cloud-based customers, real-time blackouts are enabled by default. Reference: *Discover Administration Manual v5.6* and *inContact Discover Production Deployment Guide v5.6*.
- **Manual Player Blackouts:** Users with appropriate permissions can now manually apply a blackout to a recorded interaction to protect sensitive information. This feature can supplement scripted or on-demand blackouts and provide an extra layer of protection if sensitive data is inadvertently recorded. Reference: *Discover User Manual v5.6*.
- **Call Exporting Enhancements:** When users export a recording, they can now rename the exported file by means of user-defined filename masks. They can also export multiple records in a single batch. Reference: *Discover User Manual v5.6*.

- **Multi-DN Support:** *Applies only to premise-based customers with Avaya DMS-MLS integrations.* This enhancement to our recording integration with Avaya MLS allows Discover to record all physical keys on a single IP phone; previously, there was a 2-key restriction. Reference: *Uptivity WFO Customer Guide to Avaya DMS-MLS Integrations* and *Uptivity WFO Installer's Guide to Avaya Integrations*.
- **Agent-Initiated Recording Playback:** *Applies only to cloud-based customers.* Recordings initiated by agents using inContact Agent can now be searched for and retrieved in the Discover Call List, and played back using the Discover Web Player. This allows for unified search and playback for both agent-initiated and scheduled recordings. Reference: *inContact Discover User Manual v5.6*.
- **Avaya IP Office Integration:** *Applies only to premise-based customers.* Uptivity WFO now integrates with Avaya IP Office v9.0 for call control and metadata. The integration supports both passive VoIP and TDM (station tapping) for audio acquisition. Reference: *Uptivity WFO Customer Guide to Avaya IP Office Integrations*.
- **Unify OpenScape Voice Integration:** *Applies only to premise-based customers.* Uptivity WFO now integrates with Unify OpenScape Voice v7.0 for call control and metadata. The integration supports passive VoIP audio acquisition. Reference: *Uptivity WFO Customer Guide to Unify OpenScape Voice Integrations*.

Quality Management

- **Calibration:** QM administrators can now have multiple evaluations completed for the same recorded interaction for purposes of calibration. Calibration evaluations do not affect agent and group scores and trending, and can be reported on separately. Reference: *Discover QM Manual*.
- **Filtering Enhancements:** Users can now filter by agent status when searching QA evaluations, QA acknowledgments, and content acknowledgments. Reference: *Discover QM Manual*.
- **Completed Evaluation Enhancements:** Completed evaluation forms now show the date and time the evaluation was completed. In addition, when agents view their completed evaluations, they will not be able to see the name of the evaluator unless they have specific permission to do so. Reference: *Discover QM Manual*.

Reporting

- **Audio Information for Ad Hoc Reports:** Discover applies audio information tags to a recording based on the audio information in the call. The available tags are Silence and Crosstalk. Previously these tags could only be used in ad hoc reporting by customers with the optional speech analytics module. Under the Derived Audio Tags heading, audio information tags have now been added for use with call recording ad hoc reports. Reference: *Discover Reporting Manual*.
- **Calibration Reports:** Several new reports, and new versions of existing reports, are now available to support the Calibration feature in Discover Quality Management. Reference: *Discover Quality Management Manual*.

Clarity WFM

- **Custom Location Support for Employee Photos:** Customers can choose to have employee photos stored in a custom location. Reference: *Clarity Administration Manual*.
- **Request Approval Enhancements:** Customers can now grant a user permission to approve shift swap requests on the Processes report without also granting them permission to approve leave requests. Previously, these permissions were linked. Reference: *Clarity Administration Manual*.
- **Processes Report Enhancements:** Users can now control the number of leave and shift swap requests shown per page on the Processes report screen. Reference: *Clarity User Manual*.
- **Shift Swap Workflow Enhancement:** When two employees have agreed to a shift swap, Clarity notifies their Supervisor(s) via email that the swap is pending approval. Previously, Supervisors had to monitor the Processes report or the Dashboard widget on their Home page to be aware of pending swap requests. Reference: *Clarity User Manual*.
- **Adherence Data Export:** Adherence data can now be exported to a .csv file for reporting or use in other applications. Reference: *Clarity User Manual*.

Performance Management

- **inView Integration:** Uptivity WFO now integrates with inView performance management to provide customers with a unified view of all activity and data related to the contact center. inView collects information from Discover WFO data sources, then transforms and presents it in a visual format.

Survey

- **New Survey Types:** *Applies only to cloud-based customers.* In earlier versions, only one method of survey presentation was supported: after the agent/caller interaction ended, Discover called the customer using CallerID and delivered the survey. In conjunction with inContact Studio v15.1, this release adds support for three additional types of survey delivery:
 - The caller can provide a different number for survey callback.
 - The caller can be directly transferred to the survey at disconnection of the agent leg of the call.
 - The caller can be directly transferred to a survey by dialing a specific number (thus enabling surveys for purposes unrelated to a contact center interaction).

Functionality Changed or Removed

- **Discover On-Demand:** Previously, Discover On-Demand files were located in the Recorder directory. With v5.6, a new folder (OnDemand Server) has been added to the Recorder directory and all relevant On-Demand files are installed to that folder.
- **HTML5:** Support for HTML5 playback has been introduced via the Recorded Interactions list and the HTML5 Interaction Player. These components are disabled by default and are **not** being promoted to customers yet. However, you may need to enable and configure HTML5 playback in limited scenarios if specifically directed to do so.
- **Service Level Goals in Clarity:** All Skills are now required to have an associated service level goal. During an upgrade, any Skills without a service level will automatically have the default applied (80%, 20 seconds).
- **Shift Template Configuration Errors:** Clarity now prevents users from configuring Shift Templates with activities that begin or end outside the duration of the shift. During an upgrade, any existing Shift Templates with these types of errors are highlighted when the Shift Templates page loads. These errors must be corrected or the customer will not be able to create new templates or make other template modifications.

Software Support Changes

System Servers

- **Database:** Microsoft SQL Server 2014 (Enterprise and Standard editions) is now supported.
- **.NET Framework:** v4.5.1 is now required and must be installed as a pre-requisite by installation teams.

Client Workstations

- **Operating Systems:** Windows 8.1 is now supported.
- **Web Browsers:** Internet Explorer v10 is now supported; Internet Explorer v8 is no longer supported for cloud deployments *only*. Firefox ESR 24 and ESR 31 are now supported; support for ESR17 has been discontinued. Google Chrome is now supported for version 40.

Google has announced that, beginning with Chrome v42, Microsoft Silverlight is no longer supported by default. In September, 2015, Silverlight will no longer be supported at all in Chrome. Silverlight continues to be fully supported by Internet Explorer and Mozilla Firefox.

The Discover Web Player uses Silverlight functionality. All features of the Discover and Clarity Web Portals work with Chrome v42 and higher with the exception of functionality using the Interactions List tab. This includes locating and playing recordings as well as live monitoring of agents. Users should take these factors into account when choosing a web browser.

Development of an HTML5-based interface for call retrieval and playback is underway and slated for release in the near future. HTML5 technology is supported by Chrome.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

Customers who want to add Speech Analytics must upgrade to the current version. Customers who want to add to an existing Speech Analytics deployment are not required to upgrade. For example, a customer who has v5.4 Discover Call Recording and QM and wants to add Speech Analytics must upgrade to the current version of Uptivity WFO. If the same customer already had Speech Analytics and merely wanted to add 25 seats of Speech Analytics, they would not have to upgrade.

From v5.6 to v5.7 (release date 1 September 2015)

i Beginning with v5.6, inContact Discover (cloud) and Uptivity Discover (premise) are considered to be one product: **Uptivity WFO**. Changes apply regardless of deployment method (cloud/premise) unless otherwise noted.

Process/Documentation Changes

- The “Discover” name has been dropped from all product branding in favor of Uptivity (for example, Uptivity Call Recording instead of Discover Call Recording). “Discover” now is used only in reference to the Web Portal.

New Customer-Facing Features

Call & Screen Recording

- **State Sourcing for API:** This new service allows Uptivity WFO to recover more cleanly from unexpected events by providing the API Server with a snapshot of the system’s current state. Reference: *Uptivity WFO Installation Guides*.

Clarity WFM

- **Forecast Service:** This new service calculates and produces call volume predictions for use in scheduling. Reference: *Clarity Administration Manual*.
- **Notification Service:** This new service provides email notifications to users regarding other services. For example, this service notifies users when requested forecasts are ready. Reference: *Clarity Administration Manual*.
- **Data-Appropriate Forecast Models:** The Forecast Service automatically selects a forecast model appropriate to the historical data being used to create the forecast. Reference: *Clarity User Manual*.
- **Hours of Operation for Skills:** Users can now define hours of operation for skills, which improves forecasting efficiency. Reference: *Clarity User Manual*.

Performance Management

- **inView Billing Process:** *Applies only to premises-based customers.* Uptivity WFO includes a new permission that allows administrators to designate users intended for inView reporting. Reference: *Uptivity WFO Administration Manual* and *Installer’s Guide to Uptivity WFO inView Integrations*.

- **inView-Enabled Teams:** *Applies only to cloud-based customers.* Administrators can designate teams in Central as enabled for inView.

New Under-the-Cover Features

System Architecture

With this release, Uptivity WFO has begun moving toward service-oriented architecture. As part of this transition, the platform now uses a service bus model for designing and implementing communication between the mutually-interacting software applications that make up Uptivity WFO. This architectural change offers improved communication and recovery in the case of system issues.

inContact Development has chosen to implement **RabbitMQ** as the service bus for Uptivity WFO. **RabbitMQ** is open source, easy to use, and runs on all major operating systems.

The following Uptivity WFO functionality is dependent on **RabbitMQ** as of the v5.7 release:

- **Recording** — communication between **CTI Core** and the **API** service requires RabbitMQ
- **Forecasting** (*Clarity only*) — see [Clarity WFM](#) for a description of this new service
- **Notifications** (*Clarity only*) — see [Clarity WFM](#) for a description of this new service
- **Service Bus Proxy** (*Clarity only*) — see [Clarity WFM](#) for a description of this new service
- **State Sourcing for API** — see [Call & Screen Recording](#) for a description of this new service

Sales engineers should be aware of the following factors when designing Uptivity WFO system architecture for v5.7 and later (for additional information, see the "RabbitMQ Overview" in the *Uptivity WFO Installation Guide*):

- **Server** — **RabbitMQ** *must* be installed on at least one Uptivity WFO server per customer site. This server does not have to be dedicated to **RabbitMQ** (in other words, a recording or Clarity server can also be a **RabbitMQ** server). The server, which includes one or more Erlang nodes, is sometimes referred to as a **RabbitMQ** broker.
- **Ports** — **RabbitMQ** communicates over TCP port 5672. This port must be opened on all appropriate servers and firewalls.
- **RAM** — By default, **RabbitMQ** will use up to 40% of available RAM on a host server. This should be taken into account when specifying server requirements. The limit can be raised if necessary.

- **Disk Space** — By default, **RabbitMQ** requires at least 50 MB of free disk space, but recommended free space is significantly higher. A rule of thumb is to size free disk space at 50% of the configured RAM limit. For example, if the server has 4 GB of RAM, **RabbitMQ** will use at least 1.6 GB of RAM and free disk space should be at least .8 GB.
- **Clustering** — Best practice is to install a cluster of at least two **RabbitMQ** servers per customer site. This redundancy protects against system failure due to **RabbitMQ** being unavailable.
- **Locations** — **RabbitMQ** nodes are meant for LAN-based (not WAN-based) use, and should be configured to communicate only with other nodes at the same geographic location.
- **TLS** — **RabbitMQ** supports TLS connectivity for encryption of information in transit.
- **API/Core Communication** — With **RabbitMQ**, all **API Servers** at the same location (LAN) will be aware of events generated by all **CTI Cores** at that location. There is no longer a need to relate specific CTI Cores to APIs. However, API Servers on one LAN will not be aware of Core events on a separate LAN. Each LAN where recording occurs must have its own **API Server/CTI Core/RabbitMQ** setup.

Functionality Changed or Removed

- **API Commands** — Due to the changes introduced with RabbitMQ, the API INI file settings "API.RelatedCores" and "SendToAllCores" are no longer supported.
- **HTML5** — HTML5 playback, introduced in v5.6, has been enhanced to offer closer feature parity to the legacy Web Player. These components are disabled by default and are not being promoted to customers yet. However, HTML5 playback may be required in limited scenarios (for example, if the customer wants to use Google Chrome v45 or higher, where Silverlight is not supported).
- **Improved Data Storage for Clarity Schedule Updates** — Previously, Clarity retrieved two years of schedule data from the database every time an individual user's profile was viewed. When the employee's schedule was edited, the browser sent the original cached data set, followed by the newly-edited data set, to the server. The server then determined the delta between old and new data to save the edits. This resulted in large data transfers and, in cases where the entire changed data set was not received by the server, the delta (and thus the saved edits) was sometimes incorrect. With v5.7, Clarity retrieves only the schedule data necessary to support the user's view. Data sets sent back to the server are therefore smaller and the likelihood of incorrect edits and data loss is reduced.
- **Recognition of UTC Discrepancies** — Clarity now detects UTC changes in daylight saving time (DST) and prompts the user to decide to adjust the forecast to account for the change.

- **Removal of Trend Step in Clarity Forecasting** — The **Trend** step has been removed from the forecasting workflow, simplifying the process for users. Forecasts can still be edited on the **Predict** screen before being saved. The associated **Forecast Trend** permission has also been removed.
- **Removal of Forecast Models in Clarity Forecasting** — Users no longer have the ability to choose a model to be used in forecasting. Instead, Clarity automatically selects a model based on the historical data set.

Software Support Changes

System Servers

- **Software: RabbitMQ** is now required for all Uptivity WFO systems. This "service bus" manages communication between Uptivity WFO services and applications. At least one instance of **RabbitMQ** must be installed at every site in a customer's system; best practice is to have two servers hosting RabbitMQ at each site. For additional information, see [System Architecture](#).
- **Hardware:** 32-bit servers are no longer supported as all supported operating systems require 64-bit architecture. The only exception is the Windows 8.1 32-bit recording server required for Avaya IP Office integrations. Any server hosting RabbitMQ requires at least 6 GB of RAM.

Client Workstations

- **Web Browsers:** Internet Explorer v11 is now supported. Firefox ESR 24 and ESR 31 are now supported; support for ESR17 has been discontinued. Google Chrome is now supported for version 40.

Microsoft Silverlight is no longer supported in Google Chrome. Silverlight continues to be fully supported by Internet Explorer and Mozilla Firefox.

The Call List and Web Player in the Discover Web Portal use Silverlight functionality. All features of the Discover and Clarity Web Portals continue to work with Chrome with the exception of functionality using the Interactions List tab. This includes locating and playing recordings as well as live monitoring of agents. Users should take these factors into account when choosing a web browser.

Development of an HTML5-based interface for call retrieval and playback is underway and slated for release in the near future. HTML5 technology is supported by Chrome. If the customer's web browser standard is Google Chrome (in other words, Internet Explorer or Firefox are not an option), please see Product Management (Kathy Krucek and Esco Hamidovic) about potential early use of HTML5. Note that HTML5 interaction list functionality is limited and live monitoring is not yet supported.

Upgrade Notes

See [Upgrade Notes](#) for v5.0.

Documentation

i Links are provided for internal use only and require connection to the inContact network.

Uptivity WFO in the Cloud (formerly inContact Discover WFO)

Current customer-facing documentation, as well as legacy documentation for v5.5.1-5.6, can be found at:

<http://mojo.ucn.net/prodmgmt/WFO/ layouts/15/start.aspx#/Customer%20Facing%20Documents/Forms/AllItems.aspx>

The current *Production Deployment Guide* can be obtained through the Uptivity WFO installation team.

For earlier cloud-based documentation, contact documentationsrequest-discover@incontact.com.

Uptivity WFO on Premises (formerly Uptivity Discover WFO)

Current customer-facing documentation, as well as legacy documentation for v5.4-5.6, can be found at:

<http://mojo.ucn.net/prodmgmt/uptivitywfo/ layouts/15/start.aspx#/Customer%20Facing%20Documents>

Current installation and integration guides, as well as legacy documentation for v5.4-5.6, can be found at:

<http://mojo.ucn.net/prodmgmt/uptivitywfo/ layouts/15/start.aspx#/Support%20Documents%20INTERNAL>

For premise-based documentation earlier than v5.4, contact documentationsrequest-discover@incontact.com.

Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2015-09-14
1	Added port requirement for RabbitMQ to "From v5.6 to v5.7" section	2015-11-23