

Release Notes

Reference Guide

Release: NICE inContact CXone Workforce Management Enterprise 7.2

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Release 7.2 Highlights

Some features and enhancements discussed in these release notes may require additional license and maintenance fees and/or professional service fees to enable them. Please contact your sales representative for more information.

Table of Contents

Release 7.2 Highlights.....	2
A.I. Forecasting.....	3
CSV Exports	6
GDPR Compliance Ready.....	8
RCP Export to Spreadsheet Enhancement	10

A.I. Forecasting

The AI Forecasting add-on for CXone Workforce Management (WFM) Enterprise is a purchasable module that contains additional forecast models, including Box-Jenkins ARIMA, Exponential Smoothing, Multilinear Seasonal Regression, and Best Pick.

1. **Box-Jenkins ARIMA:** The methodology does not make assumptions about any particular pattern within the historical data; instead, it iterates to identify patterns and incorporate them into the model. The chosen model—based on past values, past errors or a combination of both—is then checked against the actual historical data to see whether it accurately describes the history. If the model does not fit well, the process is automatically repeated until the most accurate model is found.
2. **Exponential Smoothing:** Exponential Smoothing uses the average of historical data with exponentially decreasing multipliers. In its seasonal version, the Exponential Smoothing model uses three related equations for level, trend, and seasonality as the basis for a forecast. CXONEWFM 7.0 includes single, double and triple Exponential Smoothing with nine different configurations: Multiplicative, Additive, and No Seasonality together with Linear, Damped, and No Trend.
3. **Multilinear Seasonal Regression:** Multilinear Seasonal Regression model uses indicator variables in a multiple linear regression model to analyze seasonal effects. The indicator variables have two possible values, 0 or 1, depending upon whether the interval to which the variable applies is within the season that the variable indicates. Multilinear Seasonal Regression treats seasonal effects as additive rather than multiplicative.
4. **Best Pick Model:** Best Pick uses the forecast generation to automatically generate and compare the output of all three models to identify the one that most closely matches historical data through a back-casting validation to find the minimum residual. If this method used, it avoids the iterative process of manually generating and reviewing the output of different models to find the best one to use.

These new models may be used with most of the existing automatic forecast adjustment factors, such as including extreme values, week of month seasonal cycles, and week of year seasonal cycles. Forecasting requires that past historical data be collected and analyzed. Many factors, including (but not limited to) competitive activity, billing processes, weather, holidays, customer demographics, marketing activities and the inherent nature of the business, can affect the reliability and accuracy of a forecast and how it would typically be distributed across a day, week, or month.

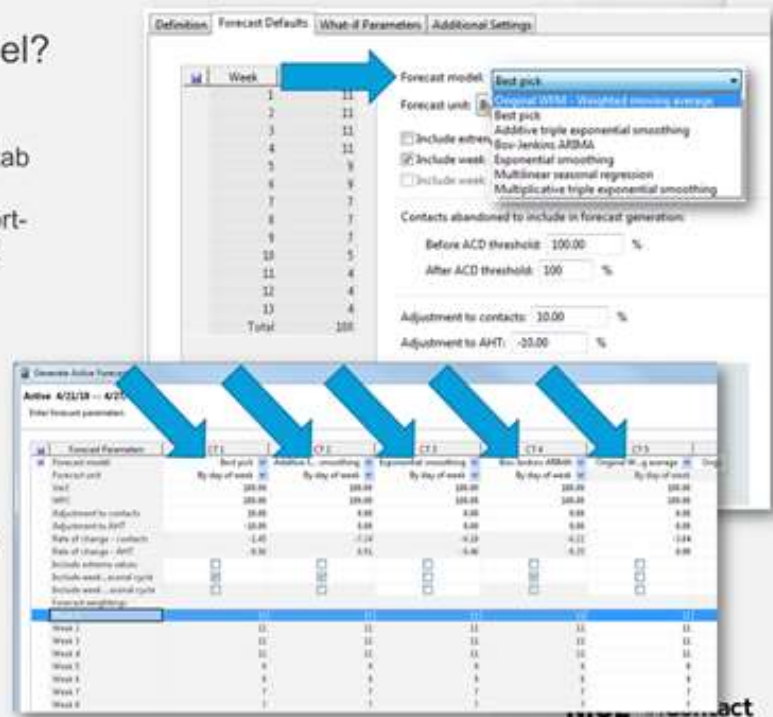
Forecasting Model Summary

	Weighted Moving Average (pre-7.x model)	Box-Jenkins ARIMA	Exponential Smoothing	Multilinear Seasonal Regression
Accuracy				
Short-Term (0-6 months)	😊	😊	😊	😊
Medium Term (6-18 months)	😐	😊	😊	😊
Long-Term (18+ months)	😐	😐	😐	😐
Identification of Turning Points*	Poor	Good	Fair	Very Good
Data Required	A minimum of two years of history if seasonality is present; otherwise less data may be used. More data is helpful.	A minimum of two years of history if seasonality is present; otherwise less data may be used. More data is very advantageous.	A minimum of two years of history if seasonality is present; otherwise less data may be used. More data is helpful.	Several years of historical data to obtain good meaningful relationships.
Captures Seasonality & Trends	No	Yes (based on pattern recognition)	Yes (based on structural analysis)	Yes (based on cause and effect relationship)

*a "turning point" is where a trend or seasonal affect shifts direction

Where do you select the model?

- BU/CT Definition Screen: "Forecast model" selection on Forecast Defaults tab
- Generate Forecast>Active, What-if Short-term, and What-if Long-term dialog box "Forecast model" row
- Options include
 - Best Pick
 - Box-Jenkins ARIMA
 - Exponential Smoothing
 - Additive triple exponential smoothing
 - Multiplicative triple exponential smoothing
 - Multilinear Seasonal Regression



New: Forecast Unit

- "Forecast unit"
 - "By day of week": a forecast value is generated for each day of week and each day's forecast value is distributed to each interval within each day*
 - "By whole time series: week": a forecast value is generated for each week and each week's forecast value is distributed to each day of week and interval within a day*
- If the queue history is < 8 weeks
 - "By day of week" is used regardless of the selected Forecast Unit
- Forecast Unit does not apply to Weighted Moving Average model (which still generates a forecast value per interval)

*see Special Notes slides

Week	Weight (%)
1	11
2	11
3	11
4	11
5	9
6	9
7	7
8	7
9	7
10	5
11	4
12	4
13	4
Total	100

NICE inContact

CSV Exports

Users can now export most CXone WFM Enterprise reports to CSV format for further manipulation of data and analysis outside of the platform.

CSV Exports for Reports

The CSV report type has been added to these reports: ACD Assignment, Adherence, Agent Detail, Agent Move History, Analysis, Conformance, Conformance by Interval, Daily Time Off, Future Activities, Intraday, Measurements, Performance Analysis, Queue Utilization, Results, Scheduled Hours, Time Utilization, WebStation.

The report does not print total or average rows nor Report Parameters section. If you are viewing CSV reports using Microsoft Excel, some report columns may show time data with an extra “:00” on the end or date and time columns using military time. The default report type is PDF, or the last report type you selected, if your web browser has cookies enabled. Reporting Groups and Agents are generated from ACD Assignment report, CXONE WFM Supervisor WebStation displays the (Reports>Generate) page for the report. In the Report by field, select to generate the ACD Assignment report by Agent, Agent data, MU, or MU set. The default selection is Agent.

If you select Agent, you can generate the report for one or more selected agents assigned to the selected agent data group and value, MU, or MU Set. The default selection is your preferred MU or MU Set, based on the preferred entity you defined in the Data Preferences page. If you select an agent data group and value, and there are no agents assigned the selected agent data value, the report prints the headings with no data.

If you select Agent data, you can generate the report for the agents assigned to one or more selected agent data values for the selected MU or MU Set. If you select MU, you can generate the report for all agents assigned to the MU.

If you select MU set, you can generate the report for all agents assigned to MUs within the MU Set.

Report Parameters You can select these report parameters when generating an ACD Assignment report:
Note You can enter a note for the report you are generating. The note appears in the “NOTE” column in the list of generated reports located on the Reports>View - Data Reports page, and it also appears in the header of the generated report. The note can contain up to 255 characters. The Note field is not available if you selected the CSV report type.

CSV Reports – New Report Type



Reports→Generate: CSV will only display as a new Report Type option if available for the selected report.

Reports with CSV available:

1. Adherence Report	10. Measurements Report
2. Time Utilization Report	11. Analysis Report
3. Intraday Report	12. Results Report
4. Queue Utilization Report	13. WebStation Schedule Changes Report
5. Agent Detail Report	14. Future Activities Report
6. Daily Time Off Report	15. ACD Assignment Report
7. Conformance by Interval Report	16. Agent Move History Report
8. Conformance Report	17. Scheduled Hours Report
9. Performance Analysis Report	

GDPR Compliance Ready

The EU has introduced a standard for strengthening and unifying data protection requirements for individuals in the EU and for personal data export. The EU General Data Protection Regulation (GDPR) was designed to protect and empower all EU citizens data privacy. It applies to the processing of personal data.

CXone WFM Enterprise is now GDPR compliant. Beginning with CXone WFM R7.2, the GDPR Compliance Ready feature is available to enable advanced security options on the CXone WFM database. GDPR directly addresses personal data for individuals which consist of name, a photo, an email address, bank details, posts on social networking websites, medical information, IP address. Any information related to a natural person or 'Data Subject', that can be used to directly or indirectly identify the person.

A GDPR compliance option is now available for WFM Enterprise. This feature limits the collection and storage of personal data in accordance with the GDPR standard. The GDPR standard includes provisions for security considerations, data minimization, data deletion, consent management, breach notification, and more.

Beginning with NICEInContact WFM Enterprise 7.2, these changes help customers comply with the GDPR mandates. When GDPR is turned on the following data points are encompassed.

- First Names are changed to UUID
- Last Names are changed to user role (Supervisor or Agent)
- Login ID are changed to deleted
- Emails are changed to deleted
- External ID are changed to deleted
- Pop up will be shown in RCP saying "All User personal information will be deleted in 7 days"
- Logs will indicate user deletion (based on users UUID)

If the GDPR Compliance Ready feature is disabled, flat files and process reports created during forecasting, scheduling, meeting scheduler, and award bids can include agent personal information. If the GDPR Compliance Ready feature is enabled, the flat files and process reports are deleted after 6 days (default value).

If the GDPR Compliance Ready feature is enabled, deleting an agent or user now deletes the agent or user personal data in 14 days, instead of 7. Any personal information for the agent or user no longer appears in the WFM system after the 14 days.

DO YOU SPEAK GDPR?

- **Data Subject** – An individual who is the subject of personal data
- **Personal Data** - Any information related to a natural person or 'Data Subject', that can be used to directly or indirectly identify the person (e.g. name, photo, online identifiers, location, political opinions, ethnic origin and more...).
- **Processing** - any operation or set of operations which are performed on personal data (e.g. recording, profiling, structuring, storage)
- **Data Controller** - Entity which determines the purposes and means of the processing of personal data (e.g. bank, internet company)
- **Data Processor** - body which processes personal data on behalf of the controller (e.g. IT outsources, marketing vendor)
- **DPO - Data Protection Officer** a professional whose tasks are set out in Article 39 of the GDPR and who is responsible for applying legislation on privacy and data protection

RCP Export to Spreadsheet Enhancement

Updated the Export to Spreadsheet functionality in the RCP (where it exists) with the ability to download the exported data to a **.xls**, **.xlsx**, or **.csv** file based on your **Spreadsheet format** on the **Home > User Preferences > General Preferences** page.

- If the **Spreadsheet format** is **XLS** or **XLSX**, and you have Microsoft Excel installed, the data displays in the Microsoft Excel application.
- If the **Spreadsheet format** is **XLS** or **XLSX**, and you do not have Microsoft Excel installed, you save
 - the **.xls** or **.xlsx** file.
- If the Spreadsheet **format** is **CSV**, you save the **.csv** file.

Updates to Preferences Dialog

The **Spreadsheet format** field in **General Preferences** has been updated to add the **CSV** option. When this option is selected and you click **Export to Spreadsheet** on a view in the RCP, you enter a location to save the data to a **.csv** file.