Release Notes for Uptivity Discover Suite, v5.4

This document explains changes to the Uptivity Discover Suite since the release of version 5.3.

Release Build Information

Initial Build Version: 5.4.5

Release Date: 04-30-14

Obtaining the Release Software

Discover Suite software must be obtained and installed through the Uptivity Support team. Software and services are only available to customers that have a current maintenance contract with Uptivity.

To inquire about obtaining a new release, please contact your Uptivity Account Manager.

Server Requirements

The following server requirements apply to all of the Uptivity Discover Suite except for certain products that have requirements in addition to those listed here. These include Uptivity Desktop Analytics, Uptivity Surveys, Uptivity Speech Analytics, and Clarity by Uptivity.

PBX-specific integration overviews explain additional hardware, software, and licensing requirements for call recording. Your Uptivity contact can provide integration overviews and Uptivity license information.

Hardware Requirements

Hardware requirements vary depending on the telephony integration, Discover Suite components used, and number of concurrent users in the system. Speech Analytics must be installed on a dedicated machine due to CPU usage. Hardware specifications are determined by the Uptivity Solution Engineering team during the sales process.

Software Requirements

- Operating System – Windows Server 2008/2008 R2/2012 R2
- Database – Microsoft SQL Server 2008 with SQL Server Reporting Services. R2 requires SP1. R2 support depends on PBX integration. Microsoft SQL Server 2012 SP1. See the *Discover 64-bit Compatibility Brief.*

  Note 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.

- Web Server – Microsoft Internet Information Services v7.0, 7.5, with ASP.NET 4.0 Extensions; v8.5 with ASP.NET 4.5 Extensions
- Protocols supported – IPv4

Prerequisites

These software prerequisites will be installed on the server prior to Uptivity software installation:

- .NET Framework v4.0 or greater
- Microsoft Visual C++ Runtime v8.0.50727.4053 – For more detail on this software see knowledgebase article 973544 on Microsoft's support site.
- Microsoft PowerShell v2.0 or greater – For more detail on this software see knowledgebase article 968929 on Microsoft's support site.
- Windows Installer v4.5 or greater
- Microsoft Report Viewer Redistributable 2008, 2010 AND 2012 – For more detail on this software see knowledgebase article 971119 on Microsoft's support site.

PC Requirements

The following requirements apply to PCs using the Discover Web Portal, the Discover On-Demand client, or the Discover Toolbar client. When Desktop Recording and/or Desktop Analytics are used, Uptivity Solution Engineering should be consulted for recommended system requirements based on business needs.

Users working with the Discover Web Player normally require more powerful PCs due to the processing required for full audio and video playback. Thus, Uptivity recommends exceeding the minimum system requirements.

Software Requirements

- Operating Systems: Windows XP/2003/Vista/2008/7
- Internet Explorer 8-9, Firefox ESR 17 – ESR 26
- Microsoft Silverlight browser plug-in, v5.0.61118.0 or higher – Required for Web Portal call playback.
- .NET Framework v4.0 or greater – Required for operation of the Desktop Recording client software. Will be installed on the workstation prior to installation of the software.

Hardware Requirements

Minimum Specifications:

- 2.0 GHz Processor
- 1 GB RAM
- 50 MB hard drive space
- 1280 X 800 – minimum screen resolution at 16-bit color depth

Recommended Specifications:

- 3Ghz or 1.6Ghz dual core
- 2 GB RAM
- 50 MB hard drive space
- 1280 X 1024 or higher screen resolution at 16-bit color depth

Licensing

The Uptivity Solution Engineering team explains licensing requirements during the sales process. If SSL is used in the network, a certificate file must be purchased from a vendor (e.g., VeriSign).

Major Features & Changes

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.

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.

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.

Known End-User Issues Resolved in v5.4

Issue Type	Key	Summary of Issue
Fix	COM-1080	When the user saved a Schedule, and the Target Calls field was blank, the error message indicated that the Target Percent value was missing.
Fix	COM-2794	In IE v8/9, with "Display a notification about every script error" enabled, the Service Manager paged stopped updating and displayed an error.
Fix	COM-2870	When Analytic Tag Groups were deleted, the confirmation message was blank.
Fix	COM-2871	The word "acknowledgment" was spelled differently in different parts of the UI.
Fix	COM-2873	In the Web Player, when a user clicked Categories in the left navigation menu, clicked New Category, clicked Cancel, then tried to click New Category again, the New Category link was inactive.
Fix	COM-2879	Superusers received an error indicating they were locked out even when the "Lock out Superuser after limit reached?" box was not checked in PCI Settings.
Fix	COM-2880	Certain data combinations returned blank rows in Survey Ad Hoc Reports.
Fix	COM-2883	Column headings on the Workstations Settings list incorrectly appeared to be clickable or sortable due to cursor changing from pointer to finger.
Fix	QM-385	In certain scenarios, users attempting to edit a deleted evaluation that had been previously saved in-progress, the Discover home page opened in a sub-window
Fix	QM-386	In a scenario where User A and User B simultaneously worked on a saved, in-progress evaluation, User A deleted it, and User B then clicked Save, User B erroneously received a "Saved Successfully" notification.
Fix	QM-388	In an agent's Assignment Inbox, the count of items in the left navigation column was incorrect.
Fix	QM-389	Users with the "Allow Editing of Completed QA Evaluations" permission could not do so unless they also had the "Allow Performing QA Evaluations" permission.
Fix	QM-390	The KPI widget did not refresh correctly after its settings were changed.

Fix	VOI-5433	On Cores with multiple schedule states, not all states saved correctly when edited.
Fix	VOI-5434	The About page for the On-Demand client did not reflect the correct copyright date.
Fix	VOI-5740	When configuring a Transcoder, if the user set "Enable Silence/Cross-talk Detection" to "No", the user was still able to edit fields related to silence and cross-talk even though they were grayed out.
Fix	VOI-5741	In a unique scenario, an unexpected error could occur when a user attempted to configure an Avaya DMCC Voice Board.
Fix	WFM-5887	On the Adherence Report, when an agent's scheduled spanned multiple days (e.g. 8:00pm – 2:00am), the graphic displayed correctly but the text for the scheduled time period was incorrect.
Fix	WFM-6034	When a user searched for an employee on the Leave Requests list, a page error was triggered and the table sort arrows did not appear immediately.
Fix	WFM-6060	The "Modify Call Volumes" dialog box displayed differently for the Acquire and Predict pages.
Fix	WFM-6346	Dates did not sort correctly on the Edit Business Closures page.
Fix	WFM-6347	Dates did not sort correctly on the PTO Blackout Dates page.
Fix	WFM-6349	When a user attempted to add a PTO Blackout Date with no Description, they were allowed to do so even though Description is a required field for PTO Blackout Dates.
Fix	WFM-6375	When a user modified an interval on the Predict tab for a Forecast, the chart would indicate the modification had been made but the modified bar did not reflect the updated call count.

Known Installation Issues Resolved/Changes in v5.4

Issue Type	Key	Summary of Issue
Change	COM-2631	Changed the Installer to set the App Pool to Integrated instead of Classic mode since Classic Mode is no longer supported.
Fix	COM-778	After uninstalling the CallCopy v5.2 product, a CallCopy\bin folder remained.

Known End-User Issues as of the v5.4 Release

Following is a comprehensive list of known issues and the version(s) they affect.

Issue Type	Key	Summary of Issue	Affected Version(s)
Discover by Uptivity			
Functionality	COM-733	Some data may appear incorrectly if the culture is changed on the Web Portal settings (e.g. from English UK to English US)	Discover v5.2, v5.3, v5.4
Functionality	COM-736	In some instances, users may log out from a page and not be returned to that page automatically when they log back in.	Discover v5.2, v5.3, v5.4
Functionality	COM-737	In some instances, users may not see their default dashboard when they login.	Discover v5.2, v5.3, v5.4
Error Message	COM-758	If a dashboard has multiple instances of a widget for which the user does not have necessary permissions, error messaging may not display for all instances.	Discover v5.2, v5.3, v5.4
Performance	VOI-5738	Live monitoring of screens is noticeably slower in IE8. This is because IE8 repaints the entire screen upon page update. Performance is better in IE9 and Firefox, which repaint only areas that are changing.	Discover v5.3, v5.4
User Interface	COM-2957	On the System Status Report, the triangle icons for expanding/collapsing Channel Summary, Channel Status, and Screen Capture Client Status are missing. User can still expand/collapse the section by clicking on the section title.	Discover v5.4
Functionality	COM-2791	In some cases, multiple attempts may be needed to remove a service from the Service Manager.	Discover v5.3, v5.4
Reporting	COM-2951	The critieria "Tag Group ID" is not available for ad hoc reporting.	Discover v5.4
Functionality	COM-2987	**In Internet Explorer 9 only**: when importing users from a CSV file, the import occurs twice and results in duplicated users.	Discover v5.4
User Interface	COM-2963	When assigning users to roles, the user must click the desired role again after each Save.	Discover v5.4

Discover Toolbar (formerly cc: Insight)			
Functionality	COM-1375	Drag/drop control in the Toolbar does not always highlight.	Discover Toolbar v5,2, v5.3, v5.4
Discover Quality Assurance, Coaching & Training			
Functionality	AG-17	When a user sets an Achievement to be awarded to a Group, the Evaluation form drop-down list does not populate with associated forms.	Discover Coaching & Training v5.4
Functionality	COM-2984	When placed in a dashboard with the Assignment Inbox Widget, the Achievement Widget's pagination may be incorrect.	Discover Coaching & Training v5.4
Functionality	COM-2985	If a dashboard contains more than one Achievement Widget, only the first widget displays and functions correctly.	Discover Coaching & Training v5.4
User Interface	QM-178	When users click the Done icon for an item in the Assignment Inbox Widget, all entries on the Pending Assignment page disappear (but reappear when the page is refreshed).	Discover Coaching & Training v5.2, v5.3, v5.4
Functionality	QM-387	On questioned evaluations, editing is not limited to the evaluator but can be done by any user with the appropriate permissions.	Discover Quality Assurance v5.3, 5.4
Functionality	QM-446	When viewing items in the Content Library, users cannot sort by Size or Assigned Categories.	Discover Coaching & Training v5.4
Functionality	QM-447	The count next to New Assignments in the Assignment Inbox may not match the actual number of new assignments displayed.	Discover Coaching & Training v5.4
Uptivity Speech Analytics			
Functionality	ANL-5194	When a Speech Tag Detail report is generated for specific agents, the label "Selected Groups" appears instead of "Selected Agents".	Uptivity Speech Analytics v5.4

Clarity by Uptivity			
User Interface	WFM-6939	When users select the Facebook notification option for Bidding Schedules, the notifications do not post to Facebook.	Clarity v5.4
Functionality	WFM-6923	Bidding Schedules do not display based on the "First Day of the Work Week" setting in Clarity configuration. They display beginning with the first day that has shifts in the schedule.	Clarity v5.4
User Interface	WFM-6879	In Firefox 23 only: Available shifts may not display properly when an agent is viewing them on the "Bid for Schedules" page.	Clarity v5.4
Functionality	WFM-6845	Shift swap requests and approvals are not filtered by valid skill intersection. Thus, an agent may make an invalid swap request (e.g. request swap with an agent whose skill set does not match).	Clarity v5.4
Error Message	WFM-6975	Clarity does not allow users to delete Skills that are in use. If users attempt to do so when making multiple changes on the Edit Skills page, they do not receive an error message until they try to save changes. The message does not identify which skill triggered the error.	Clarity v5.4
User Interface	WFM-6977	When creating a schedule, users can select an end date that occurs prior to the start date.	Clarity v5.4
User Interface	COM-2983	In the Settings dialog box for the News Widget, the Labor Units header is mislabeled.	Clarity v5.4
Functionality	WFM-6026	Users may be able to create employees with the same Device Unique ID, which should not be allowed.	Clarity v5.2, v5.3, v5.4
Help Message	WFM-6954	When creating an import file for Forecasting, the timestamp can be in either Unix or ISO 8602 standard formatting. The help message only lists Unix.	Clarity v5.4
User Interface	WFM-6973	When a Bidding Schedule is automatically generated, multiple unrelated Labor Units can appear with the schedule on the Manage Bidding Schedules page.	Clarity v5.4
User Interface	WFM-6965	In IE9 only: on the Trend page, when "Next" is clicked but no historical data set has been selected, the field validation message does not fully display.	Clarity v5.4

Uptivity Speech Analytics			
Functionality	ANL-5072	Stereo recordings that are encrypted are not tagged.	Speech Analytics v5.2, v5.3, v5.4
Functionality	ANL-5187	The Speech Category Trending Report incorrectly displays tags that are not assigned to a speech tag group.	Speech Analytics v5.3, v5.4
Functionality	ANL-5192	The Derived Audio Tags Summary Report generates a browser error when created in HTML format if criteria are set to out-of-range values.	Speech Analytics v5.4
User Interface	ANL-5191	In some scenarios, when adding an Analytic Tag, an effective date can be selected that occurs prior to the effective start date.	Speech Analytics v5.4
Error Message	ANL-5188	When adding an Analytic Tag, if the user enters a non-standard date, an "unexpected error" message is generated rather than a message specifying the actual problem.	Speech Analytics v5.4

Known Installation/Support Issues as of the v5.4 Release

Following is a comprehensive list of known issues and the version(s) they affect.

Issue Type	Key	Summary of Issue	Affected Version(s)
Installer	COM-607	Application Installer still asks for three databases.	V5.2, v5.3, v5.4

Related Documentation

Installation Instructions

Installation Manuals are provided only to authorized Uptivity distributors. If you need to obtain installation documentation, please contact your Account Manager.

Manuals

All administrative and end-user manuals for the software can be obtained from the Uptivity online customer success portal at https://success.uptivity.com.

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