



**inContact
Workforce
Optimization
External Release
Notes 16.3**

www.incontact.com

inContact Workforce Optimization External Release Notes

- **Version** – 16.3
- **Last Revision** – October 2016
- **About inContact** – inContact (NASDAQ: SAAS) is the cloud contact center software leader, with the most complete, easiest, and most reliable solution to help organizations achieve their customer experience goals. inContact continuously innovates in the cloud and is the only provider to offer a complete solution that includes the customer interaction cloud, an expert service model, and the broadest partner ecosystem. Recognized as a market leader by Gartner, IDC, Frost & Sullivan, Ovum, and DMG, inContact supports over 6 billion interactions per year for enterprise, midmarket, government organizations, and business process outsourcers (BPOs) who operate in multiple divisions, locations, and global regions. To learn more about inContact, visit www.incontact.com.
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Release Notes for inContact Workforce Optimization 16.3

This guide introduces the changes to inContact WFO since the release of the previous version.

Release Dates – October 12, 2016

Obtaining the Release Software

Hosted customers will receive information regarding the update timelines for their deployment. For Premises customers, inContact WFO software must be obtained and installed through the inContact WFO Installation team. Software and services are only available to customers that have a current maintenance contract with inContact.

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

Customer Site Requirement Changes

Note:

This section discusses **only** those site requirements that have changed since the previous version of inContact Workforce Optimization. For complete information regarding site requirements, see *Customer Site Requirements for inContact WFO, 16.3* and the appropriate customer guide(s) for recording integrations, workforce management integrations, or both.

Server Hardware

Hardware requirements vary depending on the deployment model, telephony integration, inContact WFO components used, and number of concurrent users in the system.

No new hardware requirements have been introduced in 16.3.

Server Software

.NET 4.6.1 is now required as a prerequisite on all inContact WFO servers. No other server software changes have been introduced in 16.3.

User Workstation/PC

Note:

When a system includes inContact Screen Recording, inContact Desktop Analytics, or both, consult inContact WFO Sales Engineering for recommended system requirements based on business needs.

Mozilla Firefox 45 ESR is now supported. Mozilla Firefox 31 ESR is no longer supported.

inContact WFO offers two options for recording search and playback. The **Call List** and **Web Player** (also known as the Silverlight Player) are supported in the following browsers: Internet Explorer and Firefox only. The **Interactions List** and **HTML5 Interaction Player** are supported in the following browsers: Chrome and Firefox only.

Users should take this into consideration when choosing which browser to use.

Note:

The HTML5 **Interaction List** does not yet support live monitoring or speed-adjusted playback. It also does not support manual blackouts.

Licensing

inContact WFO Sales Engineering explains licensing requirements during the sales process. If SSL is used in the network, a certificate file must be purchased from a vendor such as VeriSign.

Major Features and Enhancements

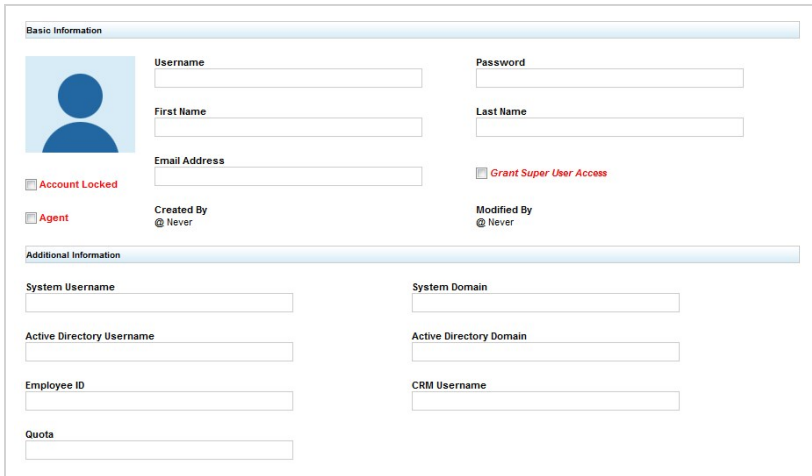
For additional information, see the technical documentation references cited for each feature or ask your inContact WFO representative. Features are available to Hosted, Hybrid, and Premises customers unless otherwise specified.

Entire inContact Workforce Optimization Suite

Unification – *Applies to Hybrid and Hosted customers only.* Unification is the over-arching name for a collection of four initiatives designed to provide customers with improved useability and a consistent look-and-feel experience throughout different inContact products. These initiatives are:

- **Unified Authentication** – Users will log in once and have access to inContact Central, inContact Workforce Optimization, and inContact Workforce Management v2 (based on the products they use).
- **Unified Look and Feel** – Common styling has been applied across the product suite. inContact WFMv2 and inContact WFO, which previously had their own, very different, web portals, are now accessed through the Central interface.

- **Unified User** – Previously, users were created in Central and managed in the inContact WFO Web Portal or inContact WFMv2 Portal. Now all user management, including assigning of permissions and access to data, is done in Central. A common user profile works across all applications. **Reference:** Online Help > inContact WFO Administration > Users



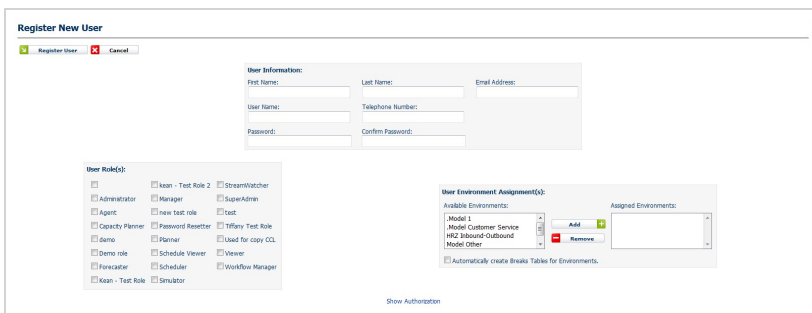
Basic Information

Username Password
 First Name Last Name
 Email Address Grant Super User Access
 Account Locked
 Agent Created By @ Never Modified By @ Never

Additional Information

System Username System Domain
 Active Directory Username Active Directory Domain
 Employee ID CRM Username
 Quota

Before



Register New User

Register User Cancel

User Information:

First Name: Last Name: Email Address:
 User Name: Telephone Number:
 Password: Confirm Password:

User Role(s):

kaa - Test Role 2 StreamWatcher
 Administrator Manager SuperAdmin
 Agent new test role test
 Capacity Planner Password Resetter Wfana Test Role
 Demo Reporter Used for copy CCL
 Demo role Schedule Viewer Viewer
 Forecaster Scheduler Workflow Manager
 kaa - Test Role simulator

User Environment Assignment(s):

Available Environments: Assigned Environments:
 Model 1
 Model Customer Service
 W2 Inbound-Outbound
 Model Other

Automatically create Break Tables for Environments.

Show Authorizations

Before

Step 1:
Create User

Success

Create User
Cancel

User Information

* First Name

Middle Name

* Last Name

* Team

Reports to

Internal ID

User Security

* Security Profile

Email Address

* Username

* Password

* Confirm Password

Federated Identity

SIP User

Time Zone Information

* User will use

* Country

State

* City

Refusal Timeouts

Chat seconds

Phone seconds

Work Item seconds

Default Dialing

Pattern

WFM Notifications

Enable WFM Notifications

Interval minutes

Maximum Concurrent Chats

Maximum Team Default 1 (1-8)

Maximum Email Inbox Limit

Maximum Team Default 25 (1-25)

After

- **Unified Authorization** – All permission management is performed in inContact Central. Roles, which were previously created and managed separately in inContact WFMv2 and inContact WFO, have been replaced with Security Profiles managed in Central. **Reference:** Online Help > inContact WFO Administration > Security Profiles or [Page Details: Create Security Profile WFM](#)

Player Permissions

Allow Viewing of User's Own Records Allow Downloading of Export Allow Bookmarking

Allow Viewing All Call Records & QA Evaluations Allow Emailing of Export Allow Viewing of Video

Allow Player Blackout

Allow Live Monitoring of Calls

Before

<< Back to Security Profiles + Create New

Manager

Details Password Policy Permissions **WFO** WFM Reports Restrict Data Assigned Users Audit History

WFO

General ▼

Call Recording ▲

Recording Schedules	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Delete
Recording Record And Files	<input type="checkbox"/> Delete			
Call Records	<input checked="" type="checkbox"/> Agent View	<input checked="" type="checkbox"/> Supervi...		
Live Call Monitoring	<input checked="" type="checkbox"/> Allow			
Bookmarking	<input checked="" type="checkbox"/> Allow			
Player Blackout	<input type="checkbox"/> Allow			
View Video	<input checked="" type="checkbox"/> Agent View	<input checked="" type="checkbox"/> Supervi...		
Exports	<input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> Email		

Quality Management ▼

Reporting And Analytics ▼

Tools & Settings ▼

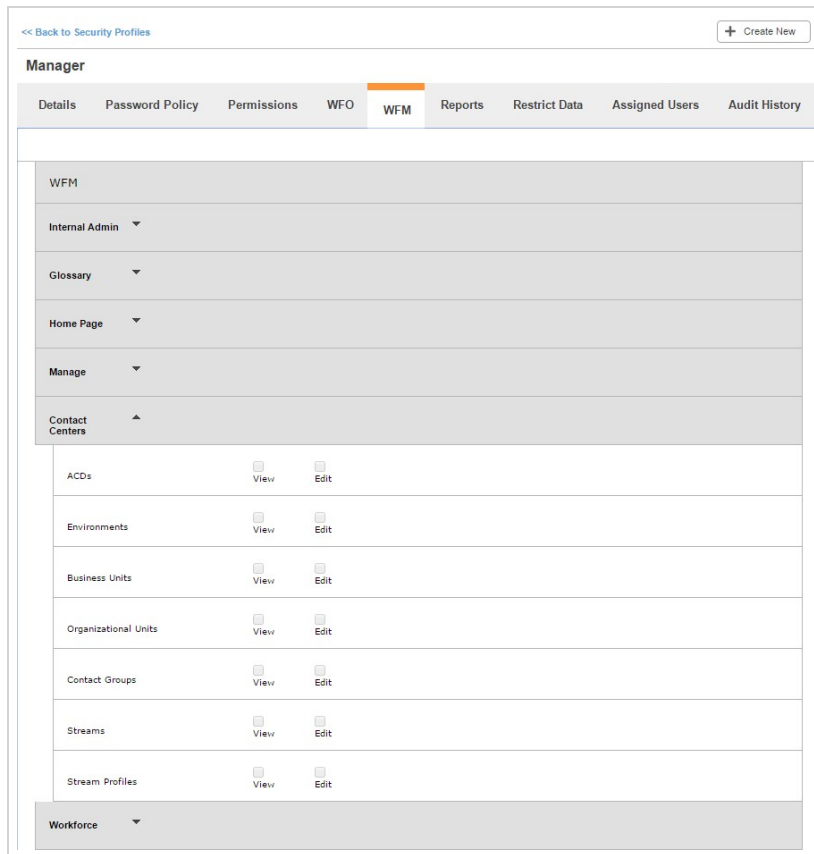
After

Edit Role

Editing Permissions for Demo role role:

Categories	Create	View	Edit	Delete	Copy	Upload	Lock Others	View Others	Edit Others	Delete Others	Transfer	Transfer Others	Make Official	Administrator
Administration														
Database														
Hardware														
Planning														
Quality Assurance														
Workflow														
Workstation - Adherence														
Workstation - Administration														
Workstation - Analytics														
Workstation - Manage Schedules														
Workstation - Operators														

Before



After

Unification includes multiple considerations that require careful thought and planning for upgrading customers. Your Technical Account Manager will work with you closely to ensure the process is as seamless as possible.

inContact Workforce Optimization

Upgrade Path — *Applies to Hosted customers only.* Customers currently using inContact WFO 15.2 can now upgrade to 16.3, gaining access to the latest features and functionality.

Note:

inContact Workforce Optimization 16.3 does not support the inContact Speech Analytics and inContact Survey products offered in 15.2. Customers using these products should discuss their upgrade options with their Technical Account Manager.

WFI Integration — *Applies to Hosted customers only.* inContact Quality Management now integrates with inContact Workforce Intelligence. Customers can use data points from inContact Quality Management for creating WFI rules. Available data points include overall evaluation score as well as questions and answers specific to individual evaluation forms.

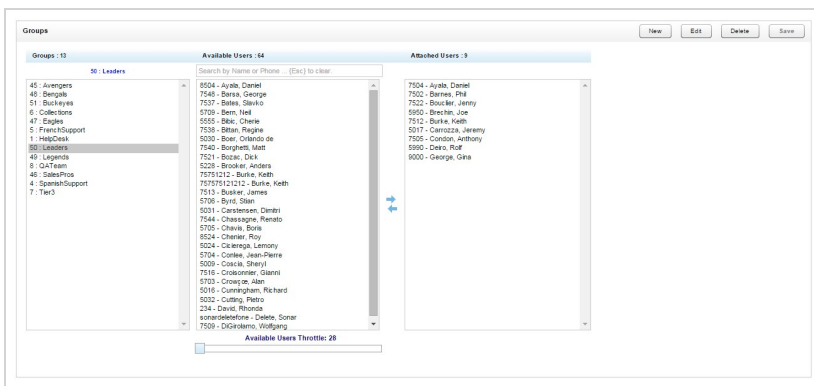
Custom API Integration – *Applies to Hosted customers only.* Two APIs used in Hosted deployments, the Recording API and the Export API, are now exposed and can be used in custom integrations. **Reference:** TBD.

inContact Workforce Management v2

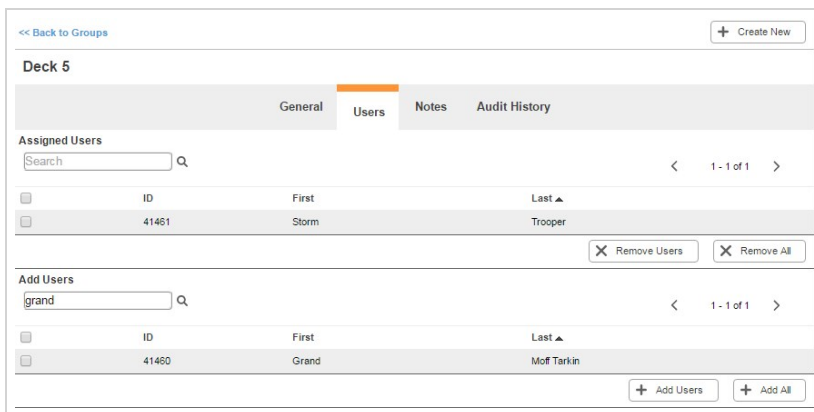
Forecasting Enhancements – inContact WFMv2 now provides you with the ability to forecast and staff appropriately for multiple media types, including SMS/chat, email, and outbound using inContact Personal Connection.

Functionality Changed or Removed

inContact WFO Groups – *Applies to Hosted and Hybrid customers only.* inContact Groups are used to control access to evaluations, recordings, and other content in inContact WFO. Previously, these groups were managed in the inContact WFO Web Portal. Now, inContact Groups are managed in Central. **Reference:** Online Help > inContact WFO Admin > Groups > Groups Overview



Before



After

Recording Schedules – *Applies to Hosted and Hybrid customers only.* Users no longer have the option to assign a different owner to a recording schedule. The creator is automatically treated as the schedule owner. In addition, the list of Schedule Owners on the Schedule Query page now shows all users, not just those with scheduling permissions.

Arbitration Workflow – *Applies to Hosted and Hybrid customers only.* Previously, an evaluator could select only another evaluator as an arbitrator when creating an evaluation. Now, the potential arbitrators list displays all users who meet the following requirements:

- User is Active
- **User Type** is *Supervisor*
- User has an email address in their account

Known End-User Issues Resolved in 16.3

Issue Type	Key	Issue Summary
inContact WFO API Commands	225038	Exporting multiple calls via API command could result in inconsistent file names.
Call List	287122	If a user clicked a calendar date in the Call List, a message appeared stating that "an unknown error occurred." However, there was no actual error and functionality was not affected.

Known End-User Issues for 16.3

There are no known end-user issues as of the GA date of this release.