



DISCOVER SOFTWARE SUITE CUMULATIVE CHANGE GUIDE

v4.5-5.4

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Reference Guide

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Introduction

This document is designed for system administrators and users of the Discover Software Suite, as well as for Uptivity personnel. It provides a high-level overview of features added, changed, and removed during the period from v4.5 of the Suite until the present day. Each section lists only the differences specific to that version. The Discover Software Suite includes:

- Uptivity Call Recording
- Uptivity Coaching and Training
- Uptivity Compliance
- Uptivity Desktop Analytics (formerly cc: Fusion)
- Uptivity Desktop Recording (formerly cc: Screen)
- Uptivity Quality Management
- Uptivity Surveys (formerly cc: Survey)
- Uptivity Speech Analytics
- Clarity by Uptivity (Workforce Management)

Note For more comprehensive discussion of product functionality in each software release, refer to the manuals, guides and release notes for that version.

From v4.5 to v5.0 (release date 4-2-12)

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 by-passes 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 9-17-12)

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/Fallover 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 2-21-13)

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

- **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

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

From v5.1 to v5.2 (release date 5-31-13)

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 1,500 characters (including spaces).

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

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

From v5.2 to v5.3 (release date 12-9-13)

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 4-30-14)

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

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

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.

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com.