



CommunityWFM V.5.1 Cumulative Service Release 1

Technical Release Notes
Version January 2024

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Overview

Community Version 5.1 Cumulative Service Release 1 is the first service pack release for Community version 5.1. This service pack release adds new functionality and addresses several technical issues that apply to Enterprise and Essentials editions.

Community Version 5.1 SP1 is a full install that supports installing new clients as well as upgrading directly from Community versions 5.0 (Build 5.0.337), 5.0 (build 5.0.378), 5.0 SP1 (build 5.0.398), 5.0 SP2 (build 5.0.546), 5.0 SP2.1 (build 5.0.561), 5.0SP3 (build 5.0.696), and 5.1 (build 5.1.671).

Any clients still using 4.x versions will need to upgrade to 5.0 prior to upgrading to 5.1 SP1.

This release includes all previous hot fixes and patches released for version 5.0 GA (build 5.0.337), 5.0 (build 5.0.378), 5.0 SP1 (build 5.0.398), 5.0 SP2 (build 5.0.546), 5.0 SP2.1 (build 5.0.561), 5.0SP3 (build 5.0.696), and 5.1 (build 5.1.671).

Build details

Build version: 5.1.801.540 General Availability

Build date: January 19, 2024

Release date: January 19, 2024

Activation and Licensing Requirements

Install Path	Requirements	License Type
Installing the application for a new client	Requires generating a new license code and activation key (using appropriate customer ID and email addresses) and activate the software.	New license
Upgrading from version 4.4 (4.4.825)	<p>Requires upgrading to version 5.0 prior to upgrading to 5.1 SP1.</p> <p>Requires generating a new license code and activation key (using appropriate customer ID and email addresses) and activate the software.</p>	New license
Upgrading from version 5.0 (5.0.337), 5.0 (5.0.378), 5.0 SP1 (5.0.398), 5.0 SP2 (5.0.546), 5.0 SP2.1 (5.0.561), 5.0SP3 (build 5.0.696), & 5.1 (5.1.671)	<p>Requires generating a new license code and activation key (using appropriate customer ID and email addresses) and activate the software.</p> <p>Webex channel: A new license is required if the client is upgrading from version 5.1 (build 5.1.671) and has purchased the Webex notification channel (5.1 SP1 license required).</p>	New license
<p>Note: License key for Enterprise product edition has three options: 5.0, 5.1, 5.1 SP1.</p> <p>5.1 SP1 includes the option to enable Webex notification channel, otherwise is identical to 5.1.</p>		

What's New

Data sources

There is a new adapter for Talkdesk.

Added support for Special Unicode Characters. Settings > Data sources | Setup options | Collection Points: the following text with the dash Unicode "Escalation – 039" will be saved in the UI as "Escalation %u2013 039."

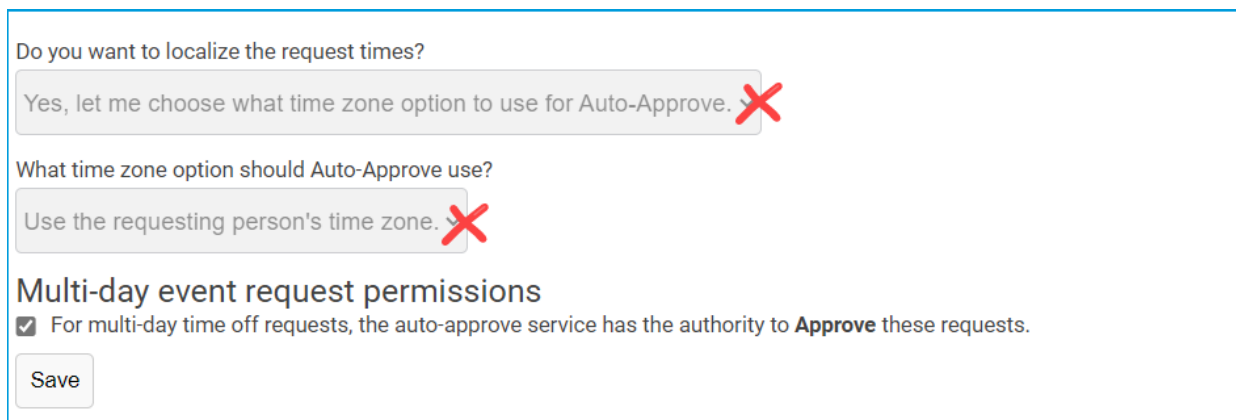
Staging DB - increased the scale of the ReasonCode column in the staging database table AgentActivity to 50 characters.

8x8 adapter: Added Reason Code to Agent Status.

LiveVox Adapter: Added Support for version 19.

Services

Settings > Application settings > Administrative settings > Services | Auto-Approve Service | Advance options: Removed corporate and UTC options from the dropdown *What time zone option should Auto-Approve use?*



Do you want to localize the request times?

Yes, let me choose what time zone option to use for Auto-Approve. ✘

What time zone option should Auto-Approve use?

Use the requesting person's time zone. ✘

Multi-day event request permissions

For multi-day time off requests, the auto-approve service has the authority to **Approve** these requests.

Save

Translations

Enhanced localization support and optimized translations for menu items for all supported regions.

Help

Includes new help videos for ASSK, GDPR, translations, and adherence comparison report.

Notification channels

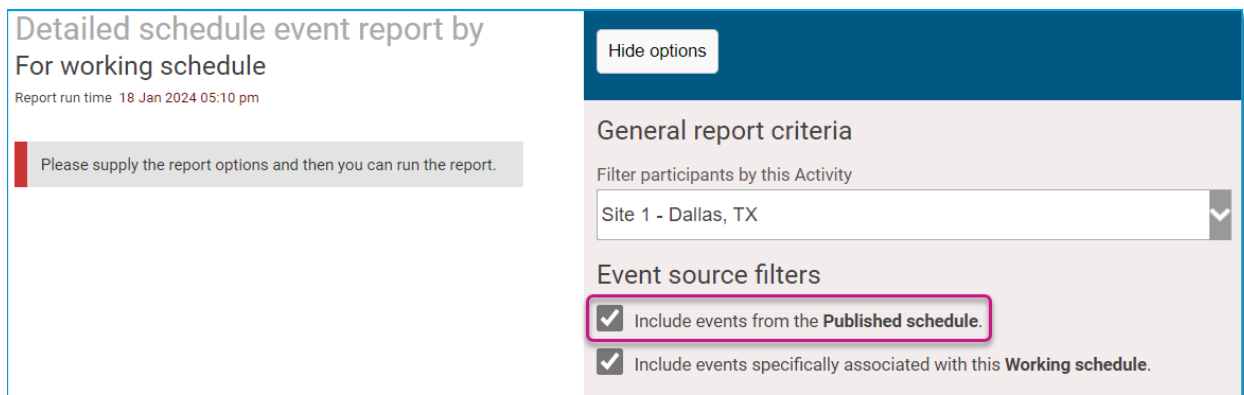
Added Webex notification channel to Settings > Application settings > Administrative settings > Notifications.

Forecasts

Forecast > Published forecast | Show revision history | shows list with last or latest updated at the top.

Schedules

Admin / Super admin View | Schedule > Working schedules > Schedule worksheet > Review events & exceptions | Reinstated *Include events from the Published schedule* as a default selected option.



Admin View | Schedule > Published schedule | Utility Schedule Reports | Published schedule audit report: added unpublished schedule comment and activities affected.

Reports

Report > Schedule adherence > Device state detail report: added Export report option.

Advanced PTO

Plan > All things time off > PTO Calendars > Working accrual calendars | Accrual tables | Generate, import, or enter accrual transactions | File Import - Excel: Changed validation of transaction dates that are outside PTO policy boundaries to Error instead of Warning.

Agent View | Plan > Time off worksheet | Upcoming time off module| Waitlist: Changed the label *Not eligible* to *Waitlisted* in the Upcoming time off module for requests added to the waitlist.

Agent View | Plan > Time off worksheet | Calendar partitions | PTO Calendar overview options | Available time off: Turned off the icons on the time off calendar for requests that are in a pending state or denied.

Agent View | Plan > Time off worksheet: Added YTD accrued hours to the PTO Classification Summary.

What's Fixed

Grammar corrections and typo fixes.

Data retention

Data Retention | Agent Schedule Transaction Detail Retention Policy | sproc is failing to remove records.

Data Retention | Agent Schedule Transaction Detail Retention Policy | Success entry is being logged in t_data_manager_audit even though sproc is failing.

Data Retention | Edit | 6 Data Retention Policies are not displaying the `Run Now Set Flag Succeeded` when clicking Run Now.

Data sources

8x8 Adapter: Data not returned in UTC (Vault 4365)

8X8: Import Historical for a single queue is not working in the 8X8 adapter.

8x8 Historical adapter: Error retrieving historical data for a length of time.

LiveVox adapter - add agentSkillId varchar(255) and interactionType varchar(255) to the LiveVox temp call table t_adapter_call_event_data.

Settings > Data sources | Setup options | Device States | State Mapping | State type & Adherence reports: Adherence report does not honor "Ignore," "Invalid," or "Unknown" state types within the adherence report.

Data targets

Report > Administrative & utility > Data targets: Ampersands in data target SFTP passwords cause part of the password to be cut off when connecting to SFTP sites, as well as getting cut off in the UI when saving a new data target's basic properties.

Admin/Super Admin | Report > Administrative & utility > Data targets: When creating a new data target, Output Option is a required field, however, if the option is left empty no message is displayed & the data target will not save.

Settings

Scheduler View | Global settings & preferences > Minimum role authorized to modify a user's login credentials is set to admin or higher and scheduler should not be able to see admins credential section.

Global settings & preferences > Minimum role authorized to modify a user's login credentials is set to admin or scheduler and when the same level role is trying to update username or credential it is giving "Unauthorized operation attempted " error.

Admin / Super admin view | Settings > Application settings > Global settings & preferences | Options Default Chart Color Palette and Use embossed border and backgrounds on charts do not appear to do anything.

Enterprise Model

Settings > Enterprise Model: UI allows dragging and dropping a parent rollup activity into a child rollup activity, causing a circular reference in t_activity.

Services

Adherence summary

Community System Monitor Service | Schedule Adherence Summary Service: On the published event summary, pending hours are not displayed in the summary by date, week, and year sections.

Community System Monitor Service | Schedule Adherence Summary Service | Data Summary Utility: summarization process stops and error reported after triggering summarization using Data Summary Utility when events are crossing midnight after deleting, adding then editing an event that crosses midnight.

Translations

Numerous corrections to translated text in all languages in menus, reports, and pages.

Settings > Application settings > People settings > Agent RAP reason codes: The items of the list of reasons codes are doubled when viewed in another language & adding new codes are not displaying the correct entered value in non-English.

Notifications

Teams Notification Channel | Schedule | Time Zone: Agent schedule returned on Teams side does not honor agent time zone setting.

Enterprise Edition | Settings > Application settings > Administrative settings > Notifications | Configure event details by channel: "Agent ad hoc messaging" event starting in 5.1 are missing Internal Memos and SMS/Text Messaging although they are enabled.

Passwords and login

Agent view | Properties | Agent Login Properties | Login Id & Admin view | People > Current list > Personal profile > Basic properties | User ID: The labels are not consistent in the admin and agent sides "Login ID" and "User ID."

Forecasts

Forecast > Published forecast: When you adjust the value in revise weekly and monthly total to more than 5-digit value, it is defaulting to 9999 no matter what five or more digit values you enter.

Forecast > Published forecast | Quick forecast: There is no validation between from and through date before clicking the generate button on quick forecast.

Schedules

Schedule > Working schedules | Create new working schedule AND Copy existing working schedule: After creating/copying a working schedule redirecting to the schedule worksheet, the displayed schedule end date is wrong.

Schedule > Working schedules & Schedule templates > Composite schedule: Error reported when attempting to Generate Optimized Schedule and Select Schedule Participant because an agent has circular ref in schedule template.

Admin view | Report > Schedule adherence > Adherence alerts | Custom user groups: After you click the regenerate report button, page is broken.

Admin/Super admin View | Report > Schedule adherence > Daily schedule adherence > Enterprise Model > Agent Details | Adapter states over 50 chars in length cause the Agent Details view to fail to load with error `String or binary data would be truncated`.

ASAP

Admin view / Agent View | Published schedule report | Accepted VTO is not showing on agent's schedule or when you execute the VTO, it is not doing anything when ASAP is created with Yes, execute the plan when participant accepts...

Agent view: ASAP | Increase Available Staff | Extend Scheduled Shifts: When ASAP is open for feedback and after the plan execution, agents are getting same memo multiple times.

Schedule bidding

Admin Views - Schedule Bids | Bid Item Inventory | Import from a Working Schedule | Step 2: Review and Import: Finish button reports an uncaught exception when clicked and seems like it is not doing anything in version 4.4, 5.0 and 5.1 although it does import successfully.

Agent & Admin Views - Schedule Bids | Show Item Details | Item Settings | Current Rank: Option is missing in 5.1 (available in 4.4 and 5.0).

Agent & Admin Views - Schedule Bids | Show Item Details | Item Options | Move Up & Move Down: Options are missing in 5.1 (available in 4.4 and 5.0).

Agent View – Schedule Bid | Preview -Today | Click here to view inventory | Utilities | Remove Likes & Bookmarks: options are missing in 5.1 (available in 5.0).

Admin Views - Schedule Bids | Bid item inventory | Create them by hand | Step 3: Define off-phone periods: Save icon is grayed out although it is active and works (issue in 5.0 & 5.1).

Self-service request

Agent View | Schedule > Self-Service request: Getting "Unable to evaluate" error while validating the schedule performance and event duration rule.

Plan > Self-service validation plans | Member event types | Configure | Schedule Performance Rule | Forecast algorithm selection: Always saved as Skill-Based Forecasting Method no matter what selection the user made.

Agent View | Schedule > Self-Service Request: an agent is able to submit ASSK request for past dates.

Schedule attendance monitor

Admin/Superuser View | Today | Automated Schedule Attendance Monitor | Interval people zoom | Mark people late: The short description field is not validated, and admins are able to put agents in late without putting in a description.

Reports

Admin / Super admin view | Report > Schedule adherence > Schedule adherence history AND Report > Schedule adherence > Daily paid time: A string comparison is used to compare the To and From dates, causing unexpected behavior when validating dates.

Report > Schedule adherence > Schedule adherence history | Supervisor level: Executive Summary exported file has no data.

Report > Published schedule > Published event summary | Summary by date & Summarized by month/year/DOW: 'Percent of total hours' column was miscalculated and over 100% in some cases.

Report > Published Forecast > Staffing Requirements | Forecasted AHT vs Actual AHT: The values are swapped on the chart and the tooltips/legend.

Report > Schedule adherence > Daily schedule adherence | Show options | Through date | Validation: User are unable to select through dates that are 3 days after the start date.

Report > Schedule adherence > Schedule adherence comparison | Print table contents: The headers are missing.

Admin/Super admin | Report > Schedule adherence > Schedule adherence comparison: When exporting the adherence comparison report to csv, the headers for the last two columns are merged (with a ").

PTO

Agent/ Admin View | When an agent or admin is requesting a single day request with "Yes, all the dates in the range must be approved together" it is considering the next day while validating and on the report showing 16 hours.

Plan > All things time off > Time off reports | When you submit an all-day request with "Yes all the dates in the range must be approved together," or partial day off (PTO/VTO) with agent with different time zone, it is showing the wrong date and start and end time.

When the agent requests all-day time off and it is denied by supervisor from the summary report or on the pending request report, it wipes out the agent's schedule.

Time Off Requests | Comments & Report > Published schedule > Published event summary: Error reported when attempting to view pending time off requests because Comments field is very long (1206 characters w/ spaces).

Admin/Super admin View | Plan > All things time off > Time off events > Create recurring time off events > Step 3: Choose participants | The All Approved button toggles individual agent's Approved button status instead of setting all to Approved.

Advanced PTO

No validation for the wrong calendar year or transaction date on the working accrual calendar when the PTO policy is created with the basic settings "Do not accrue hours - accrual transactions originate from an external application."

Admin View:- Plan > All things time off > PTO Calendars > Working accrual calendars: After an Excel upload when you choose the template, getting error of "Object reference not set to an instance of an object."

Agent view: Calendar Partition/Legacy | Plan > Time off worksheet| request planned partial time off: When requesting overnight time off with the brownout rule, validation is not working. It says everything is passed but request gets denied.

Agent view: Calendar Partition | Plan > Time off worksheet | request planned time off: When requesting time off with the brownout rule, validation is not working. It says everything is passed but request gets denied.

Agent view: Calendar Partition/Legacy | request planned time off: When requesting all-day with "Yes, all the dates in the range must be approved together" with the brownout rule, auto approve service approving more than one request.

Legacy requests should be independent of Calendar partition | Brownout rules. Legacy and calendar partition should be separate. Agents in legacy mode are having requests denied if agents in a calendar partition have already requested the time.

Plan > All things time off > PTO Calendars > Working accrual calendars | Loss of feature or 5.0 functionality: When using Excel import on a working accrual calendar, most of the headers are not mapped like it used to be in 5.0.

Known/Deferred Issues

Known

Agent View | Properties > Devices | The iCal integration URL no longer works in Outlook or Google calendar for OnPrem customer due to Office 365 changes.

Agent and Admin View: Settings > People & agent templates > People > Personal profile > PTO settings for agent, where an accrual added to the very last day of an accrual calendar is not showing up in the classification tile.

Forecast > Published forecast | when you adjust value in revise the daily total, it's adjusting to the exact numbers we've updated. **Note:** In a **published** forecast when you revise the contact volume count it should give exactly what you entered, whereas in the **working** forecasts when you revise the contact volume count it should not give you the exact count; it spreads volume across the intervals and could round up or round down.

Admin/Super admin View | Report > Schedule adherence > Schedule adherence history | The error Through date must be greater than from date displays regardless of whether the through date is greater than the from date. This does not interfere with running the report.

Deferred

Data sources

Admin/Super admin view | Settings > Data sources > <adapter> > Setup options > Device states: The UI limits device states and state descriptions to 50 chars.

Admin/Super admin View | Altigen Adapter > Connections | Custom query is not editable.

Admin/Super admin View | Asternic adapter > Connections | The first-time connection details are saved, the user-input Transaction Collection Interval, value is ignored and 5 is saved.

ShoreTel & ShoreTel Event Feed Adapters | Switching the data collection queries from custom queries to the default queries causes the custom queries to be removed and the adapter will not save the Use default queries setting.

Settings

Settings > Enterprise Model > Activity hub | Today's contact volume & handle time: In the Enterprise Model if you have an activity that is part of a folder structure that also includes a subfolder, run the contact volume report at the top-level folder showing % of total calls for the activities incorrectly.

Settings > Enterprise Model > Child activities | Physical Site | First day of schedule week | Default: Unable to save the Basic properties after selecting Default although the field is set to Default when the site is added by first setup page.

Settings > Schedule templates > Schedule templates > Composite schedule members: Error report "Input string was not in a correct format" after clicking Refresh.

Forecast

Forecast: Admin View | Forecast > Working forecasts: When we use Excel contact volume/shrinkage percentage/staffing requirements profiles to generate or import data we are getting error or page is breaking.

Schedules

Schedule > Working schedules > Schedule worksheet | Weekly days off report: When agents who have shifts starting at 5am or earlier and they are off on Sunday, "X" is not showing on Sunday on weekly days off report.

PTO

Plan > All things time off > Time off reports | Enterprise Model: When the agent is in (GMT-05:00) Eastern Time (US & Canada) time zone and requesting the time off, when you click on agent's name to edit the time off it is showing the wrong date.

When an agent requests all-day PTO with the selection "No, some of the dates can be approved and some denied" and supervisor approves on published schedule event summary report, it is not removing the underlying schedule.

Plan > All things time off > Time off reports | when agents are in different time zones and submit the planned time off with the dropdown option "Yes all the dates in the range must be

approved together" and when you view requests on the Time off report with agent's time zone date is off by one day.

Agent view/admin view | When the admin is making a manual adjustment to the event (e.g., PTO/sick), the hours are not showing up on the YTD tile.

Translations

Translations - Settings > Application settings > People settings > Agent RAP reason codes: Editing existing codes are not displaying the correct text value for non-English users/regions.

Translation | All Regions - Today page | Personalize | Automated Schedule Attendance Monitor & Pending Request Worksheet: Refresh button not translated.

ASAPs

Schedule > ASAP Calendar | Modify Current Schedules | Optimize Off-Phone Events / Edit Scheduled Events | Customize notifications | edit message on any channel | Supported Replacement Tokens section is showing empty.

Schedule > ASAP Calendar | Modify Current Schedules | Optimize Off-Phone Events and Increase Available Staff | Recover Off-Phone Events | Customize notifications | edit message on any channel | text is cut off make it fit to the screen.

Schedule > ASAP Calendar | All ASAPs: preview message is not available for SMS / text messaging.