



# CommunityWFM V.5.1 Cumulative Service Release 2

Technical Release Notes  
Version July 9, 2024

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## Overview

Community Version 5.1 SP2

This service pack (SP2) adds new functionality and addresses several technical issues that apply to Enterprise and Essentials editions.

Community Version 5.1 SP2 is a full install that supports installing new clients as well as upgrading directly from Community versions 5.x.

Any clients still using 4.x versions will need to upgrade to 5.0 prior to upgrading to 5.1 SP2.

This release includes all previous hot fixes and patches.

### Build details

**Build version:** 5.1.972.706 Cumulative Service Release 2

**Build date:** July 8, 2024

**Release date:** July 9, 2024

## What's New

### Today page (Essentials)

Added Agent Adherence Summary to Today page for all roles above agent.

### Planned time off (PTO)

Added ability to import accrual balances within a published accrual calendar.

Plan > All things time off > PTO Calendars > Published accrual calendar | PTO Classification Summary | Participant summary | List/grid view: Added missing ability to export the list of agents and Employee ID column.

Plan > All things time off > PTO Calendars > Calendar partitions | Bid round properties | Minimum & Maximum block size in hours: Increased the default value for these 2 fields to 120 hours.

Plan > All things time off > PTO Calendars > Working accrual calendars | Accrual tables | Generate, import. | File Import - Excel: disable *Next* button until user selects one of the import buttons.

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

### Services

Settings > Application settings > Administrative settings > Services: Rearchitect the adherence and published schedule summary sync services to achieve better scalability and reliability. Also, added "Number of Agents to process at a time" option.

Database Health and Backup Utility: Separated tasks for optimizing database and backup tasks.

Settings > Application settings > Administrative settings > Services | Schedule Adherence Summary Service | Process delay: Changed the process delay options to 15 min, 30 min, 1 hour or 2 hours (previously 1–10 minutes, 15 or 30 minutes, or 1 hour).

## Licensing

Licensing Overage Report: added the ability for administrators to see a list of agents who are active (Active People Report). This report can filter to show people added since exceeding the allowed number of licenses. Added the ability to deactivate or delete the agent(s) within the report.

License reconciliation specifications or Licensing process specifications: Added a report/table on the client database that lists active agents daily and keeps a history (other new report is only a snapshot of the usage). When some themes are used, the license information that shows license usage and overage is not displayed in Enterprise Model and License Activation pages.

## What's Fixed

### Planned time off

Calendar Partition: Agents requesting time off within the calendar dates getting the error "You cannot request time off outside the bounds of a defined Calendar Partition."

Plan > All things time off > Time off reports: When agents are in different time zones and submit 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 the date is off by one day.

Legacy PTO & Calendar Partition | PTO requests are getting approved by Auto Approve service although the policy is set to not allow negative balances and the agent making the PTO request has not accrued hours and there is no published accrual.

### Schedule Bids

Schedule > Schedule bids | Assign Schedule templates: After clicking the preview button, getting the error "Maximum request length exceeded."

### Login

Some users are unable to login using SSO. SAML error for various users.

### Enterprise Model

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 includes a subfolder, running the contact volume report at the top-level folder shows % 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.

## Reports

Report > Schedule adherence | Schedule adherence comparison: Getting 400 error when clicking view full scope summary.

Report > Published schedule > Schedule analysis | Schedule analysis details: The report start and end date labels are not displayed on the report.

Report > Administrative & utility > Change audit log: Moved the reports for Data Subject Rights and Data Subject Rights Response to Application tile instead of Security (Security is not available in Essentials).

Schedule Adherence Summary Report: Data is getting summarized for today although it should not.

Essentials | Report > Administrative & utility > Change audit log | Application: remove Self Service Validation Plan since that's not available in Essentials.

## Schedules

Schedule > Working schedules > Schedule worksheet | Working Schedule Shrinkage Report: If first day of week is Saturday, system fails to run working schedule shrinkage reports for newly created working schedules.

Agent View - Today | Weekly Schedule | Show Options | Show this report in full-screen view: ">" should not be visible since agent does not have access to agent card.

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

## Notifications

Settings > Application settings > Administrative settings > Notifications: Added memo for 'Time off request updated.'

Intraday Notification | Memo Text: denied intraday event added by admin sends notification that the request was approved and that it was recurring.

## People

Settings > People & agent templates > People > Current list > Personal profile > Basic properties > User login credentials: Benign error displays when changing the user ID or mobile application username.

Password policy: Admin View | Settings > People & agent templates > People > Personal profile > Basic properties for Agent | User Login Credentials: When the password policy is set to strong, the password validation displays an incomplete message with special characters.

## Services

Settings > Application settings > Administrative settings > Services | Label Change: The *Process delay* drop down says "(in seconds)" but the only options are minutes. Applies to Auto-approve service, Automated Schedule Attendance Monitor, PTO Calendar Partition Monitor Service.

Settings > Application settings > Administrative settings > Services | Schedule Adherence Summary Service | Process delay (in seconds): remove the label (seconds)

## Global settings & preferences

Essentials | Role permissions: Removed "minimum role authorized to approve agent uploaded photos" because agents can't upload profile pictures in Essentials.

## Translations

French: Admin/Superuser View | Plan > All things time off > PTO Calendars > Calendar partitions | Edit| Rules | Workflow Navigation: Basic setup tooltip not translated.

Translations | Licensing Overage Report: report headers and some labels not translated.

## Copywrite

Copyright Year: Updated year to 2024.

## Known/Deferred Issues

### All things time off

Admin view | Plan > All things time off > Time off reports: When the agent is in different time zone and submitting an all-day request, start and end date is showing wrong dates and total hours are showing in minus.

Plan > All things time off > Time Off reports: when the agent is in (GMT-05:00) Eastern Time (US & Canada) time zone and requesting time off, when you click on agent's name it is showing wrong start & end time.

Admin View: Open selection | brownout rule with 1 for number of approved requests | when you click on the validation on admin side on the published event summary report, validation is failing for the 1st request where it should pass (works fine on agent side).

Published event summary report | when you request the partial vacation hours of start and end time are showing wrong time.

When an agent in a time zone different from the Enterprise Model makes a time off request in open selection, the brownout rule is not working as expected.

### Data source

Admin/Superadmin View | Cisco Express Adapter > Setup options > Collection Points > [...] > Edit custom query | Unable to edit the custom query for an individual collection point prior to saving, and saving without editing the query fails.

Admin/Superadmin View | Cisco IPCC Enterprise 8 Adapter > Setup options > Connections | When configured to use integrated NT Auth, the real-time UN and PW input boxes are not disabled.

Adapters | Revise > Bulk import values | When bulk importing contact volume data, the import includes updates for only time intervals that are factors of the interval for historical collection.

### Data subject rights

Application Info > Data Subject Rights Policy | Grammar errors.

Agent view: When an agent requests to mask all PII now, it should not be marked as complete. The data privacy advocate needs to perform the masking, then mark the request as complete.

Application info > Data Subject Rights Requests | Typo in the page description.

## Help

Admin/Superadmin View | Help Videos > Forecasts & Schedules | The description on tiles is cut off at the last line.

## Today

Admin view | Today > Surveys | Create a new survey, Step 2 | When adding responses to a survey question, there is no option to finish adding responses.

Today's Links | Agents have the ability to create links under Today's Links that apply to all users.

Agent view | Today > Schedule Transactions > New Schedule Transactions | For all 3 transaction types, the *Not Important* star is below the radio button. The stars for the other rating levels are to the right of the radio button.

## Licensing

Licensing & Activation page | The Import an activation code tile's title is missing the word 'I.'

## Memos

When replying to a memo, the html tags are inserted directly into the message instead of being interpreted.

When creating a new subfolder, the parent folder's delete button is not disabled until after you click off and then back on to the parent folder.

## Mobile application

Third Party Authentication | Admin/Superuser View | Settings > People & agent templates > People > Current list > Personal profile > Basic properties for <AgentName> | Mobile settings do not appear to be used for third party authentication method.

## Reports

Staffing Required/Agents required value discrepancies between Published Schedule detail and Published Schedule Analysis Detail Report, when reports are filtered by site level.

Reports | Chart exports are intermittently failing & the report page redirects to export.highcharts.com with no indication why the export failed or why the redirect occurred.

Report > Published Forecast > Contact volume & handle time | Firefox only | The export button (3 pancakes) for the table view is partially covered by the scroll bar, making the export button hard to click.

Report > Published forecast > Shrinkage Percentages | Chart > Download XLS | When opening the XLS file, error `The file format and extension of chart.xls don't match` is displayed.

Reports | Published forecast > Shrinkage percentages | The report's chart has table export options in addition to the standard chart export options.

Report > Published Schedule > Schedule Details > Enterprise Report | Selecting an ASAP category from the `Choose an ASAP category` dropdown causes the `Choose an ASAP plan type` dropdown to become misaligned.

Report > Published schedule > Shrinkage report | The Executive Summary option has sub-options Shrinkage % and Shrinkage Hours. Those options appear tied to whichever main option was chosen before Executive Summary.

Report > Schedule adherence > Daily schedule adherence | The tiles for the 3 types of reports (Enterprise model, Supervisor tree, Custom user group) are in a different order than every other report.

Licensing Overage Report: the exported report in excel or csv does not show any indication or color code of the agents that went over. Consider adding a new column to show agents that went over or show in red.

## Services

Settings > Application settings > Administrative settings > Services > Database Maintenance | Backup location is required when backups are enabled, but users are allowed to save with the box empty.

Settings > Application settings > Administrative settings > Services > Database Maintenance | Backup specific configs should be disabled if *Backup enabled* is set to No.

Settings > Application settings > Administrative settings > Services | Database Maintenance description has an unnecessary word.

Community System Monitor Service | Application event logging for the Database Maintenance Service does not include the Backup enabled value.

Community System Monitor Service | Application event logging for the Database Maintenance Service erroneously logs that a full backup is being done even when *Backup enabled* is set to No.

## Passwords

Admin View | Settings> People & agent templates> People> Personal profile> Basic properties for Agent | User Login Credentials | When the password is set to strong & password is generated using the *Generate password* function, the validation displays an incomplete message with special characters.