Community v. 5.0
Cumulative Service Release 2

Technical Release Notes
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Overview

Community Version 5.0 Cumulative Service Release 2 is the second service pack release for Community Version 5.0. This release adds new functionality and addresses several technical issues that apply to Enterprise and Essentials editions.

Community Version 5.0 Cumulative Service Release 2 is a full install that supports installing new clients as well as upgrading directly from Community versions 4.4 SP2 (build 4.4.825) and 5.0 (Build 5.0.337), 5.0 (build 5.0.378), and 5.0 SP1 (build 5.0.398).

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) and 5.0 SP1 (build 5.0.398).

Installation Files

Included installation packages

Community server installation packages:

- WFMSG.Community.Database.5.0.546.687.Full
- WFMSG.Community.Database.5.0.546.687.3.6.Patch
- WFMSG.Community.5.0.546.687.Full
- WFMSG.CommunityWebApi.5.0.546.687

Community server installation package for online help videos:

- CommunityWFM.Help.5.0.5.852.Full

Community server installation package for Teams notification:

- CommunityTeamsApi.5.0.86.850

Build details

Build version: 5.0.546.687

Build date: May 31, 2022

Release date: June 1, 2022

Installation file location

ftp://wfmsg@wfmsgftp.com/community/GA%20Releases/5.0%20Releases/5.0%20Cumulative%20Service%20Release%202%20%20(Build%20version%205.0.546.687)

Activation and Licensing Requirements

Community Version 5.0 Cumulative Service Release 2 is a full install that supports installing new clients as well as upgrading directly from Community versions 4.4 SP2 (build 4.4.825) and 5.0 (Build 5.0.337), 5.0 (build 5.0.378), and 5.0 SP1 (build 5.0.398):

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)	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 5.0 (5.0.337), 5.0 (5.0.378) & 5.0 SP1 (5.0.398)	Requires re-activating the software with the current license key and activation code.	Existing license re-authorized

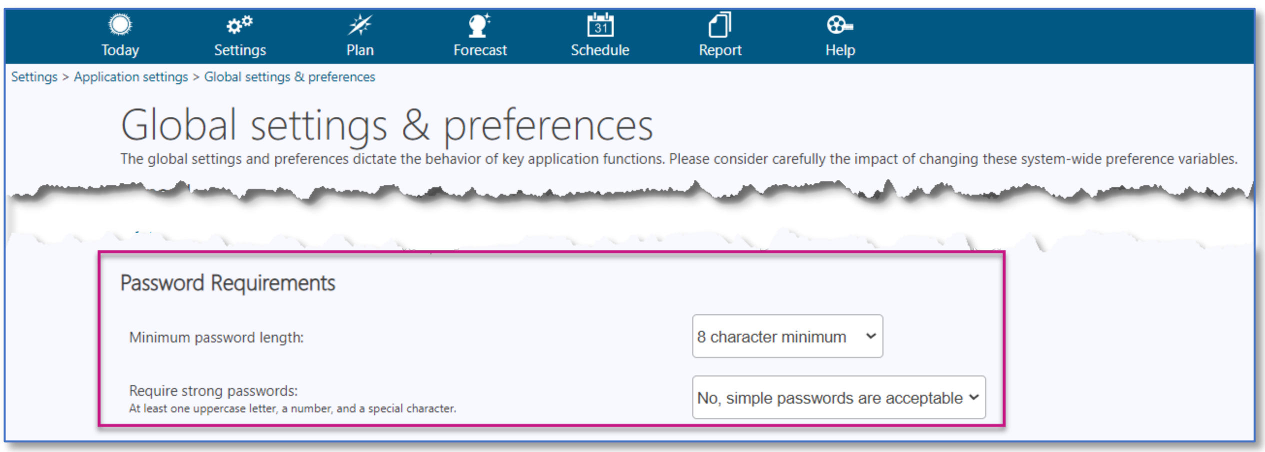
What's New

Password Requirements

Web application and mobile app authentication: Added the ability to configure password requirements for both application authentication and mobile application authentication.

Settings > Application settings > Global settings & preferences | Password Requirements: Added 2 new password requirements options:

- **Minimum password length:** 8 (default), 10, 12, or 15 character minimum
- **Require strong passwords:** *At least one uppercase letter, a number, and a special character*: 'No, simple passwords are acceptable' (default) or 'Yes, require strong passwords'



Updated the default password for Community first admin user (configured in the first-time setup page).

Data Targets

Data Targets | SFTP | Custom Ports: added the ability to support custom SFTP ports other than default port 22 (format sftp.mycompany.com:port).

Advanced PTO

Plan > All things time off > Time off settings > Accrual schedules | Years of Service: added to the list of 'Years of Service' up to 40+ years.

Online Help Videos

Added support for new 5.0 online help videos.

What’s Fixed

Login

Mobile App Login - Settings > People & agent templates > People > Basic properties | User credentials for mobile application | SSO/SAML users: Unable to login to mobile app using the password configured under 'User credentials for mobile application' instead the mobile user is able to login to the mobile app using the web application password.

Today (Home Page)

Today | Pending Request Worksheet: Supervisors should not be able to approve/deny requests in the Pending Requests Worksheet if the Role Permissions settings disallow it.

Typo: Today > Hot news | Enterprise model: missing “to” (it should read “send a message ‘to’ members).

Services and Utilities

Data Retention - Settings > Application settings > Administrative settings > Data retention policy | System internal data | Intermediate Schedule Data Truncate Policy: data retention policy was blindly deleting all rows from AgentScheduleChangeEvent, without regard to the processing status of those rows impacting the summarized data of schedules, events, and adherence.

Summary Utility - Settings > Application settings > Administrative settings > Data Summary Utility: summary utility (in the UI) was not including the full range of events in the “through date” value.

Summary Utility - Settings > Application settings > Administrative settings > Data Summary Utility: Optimize the stored procedure used by Data Summary Utility.

Data Sources

ShoreTel Event Feed Data Source - need to update queries under t_params.

Schedule Templates

Settings > Schedule templates > Schedule templates | Security button isn’t working to add securities.

Auto Approve

Plan > Auto-approve service > Rules > Enterprise model | when you add Agent Minimum Request Interval Rule and click save, it is throwing an error on console.

All things time off

Time Off: Personal profile > PTO settings | PTO Classification Summary (PTO) | Published Accrual Summary Report | when you generate accruals transactions, the hours are inaccurate when the policy is set to monthly.

Time Off: Plan > All things time off > Time off settings | PTO policies: while adding new people to a new or existing policy, inactive agents were included in the list of available agents. Corrected to show only eligible active agents.

Time Off: Plan>All Things Time Off>Time Off Events>Create Planned time off events: the PTO event will not delete the underlying schedule unless the event overlaps the schedule event in some way. Corrected to delete events such as break and lunch on PTO days.

Time Off: Settings > People & agent templates > People > Current list > Personal profile > PTO settings for agent | getting an error when you try to change an agent's assigned PTO policy.

Time Off: Agent View: Agents are not getting memos when the time off (recurring time off or request time off) was approved or denied by the administrator. Memo and notifications added for *Time off request status change*.

Advanced PTO: Agent View > Plan > Time Off Worksheet | Waitlisting: after the time off is approved and the agent is going to a minus accrued hours balance.

Advanced PTO: Schedule > Schedule bids: Getting repeated memos or memos are looping through with a subject PTO Calendar Bid Round Block Validation Status Updated.

Advanced PTO: Agent View: Plan > Time off worksheet: the agent is unable to accept the eligible waitlist item even though they have sufficient accrued hours.

Advanced PTO: Agent View: Plan > Time off worksheet | Calendar partition | Time off bid rounds: agents are getting 400 error on the calendar partition after clicking Show this bid round status.

Advanced PTO: Plan > Time off worksheet | Calendar Partition: When agent adding a block and saving a time off request, getting "Unable to validate the block. An error occurred. [973] Unable to connect to the remote server" error.

Advanced PTO: Agent View: Plan > Time off worksheet: do not allow the agents to commit the bid without validating the block; otherwise, the block status will change to 'not valid' and hours will not reflect on the agent's accrual balance once the bid is closed and published.

Advanced PTO: Agent View: Plan > Time off worksheet: when an agent has requested a vacation bid exception and the administrator has approved it, the system sends out multiple memos.

Advanced PTO: Agent View: Plan > Time off worksheet | Upcoming time off | Not Eligible Waitlist Status | Waitlist icon: error reported after clicking on icon: Exception Id: 1 Originating Namespace: WFMSG.Server.PersistencePeers.SQLServerPersistencePeers Description: No suitable persistence peer found for the given document type.

Advanced PTO: Plan > All things time off > PTO Calendars > Calendar partitions: when adding people to a PTO calendar, the participant list is showing inactive agents in addition to active agents. Corrected to show only eligible active agents.

ASAP

ASAP meeting & Planned All Day Time Off: when single agent all day time off is approved, the ASAP meetings are removed for all agents.

Schedule > ASAP calendar | Decrease Available Staff | Create VTO: Display minimum and maximum participants to accept the offer (minimum and maximum participant count) on the home page.

Schedule > ASAP | Decrease Available Staff | Create VTO events: when you create new VTO event and open for feedback agents are not getting memo or notification to accept the VTO.

Schedule > ASAP | Decrease Available Staff | Create VTO events: when you create a new VTO event, agents are getting same memo multiple times.

Schedule > ASAP calendar: On the Response Report, we are unable to see the time when agents have accepted the offer, it only shows the last updated date. Corrected to show time agent accepted.

ASAP | Increase Available Staff | Create Overtime Shifts | Basic properties: allow agents with schedules on this date to participate in this plan?: when 'Yes, ...' is selected, the 'No,...' option is selected when the user returns to Basic properties.

Schedule > ASAP Schedule: when you create and execute a Plan a meeting ASAP, on the ASAP execution status report the event type is showing as N/A and duration is not showing in minutes if it is 30 minutes (it should show 0.5).

Forecast & Schedules

Published & working forecast | Staffing requirements reports issue with Forecast staffing report where the calculations for staffing hours was incorrect resulting in inaccurate staffing FTEs and efficiency totals when using Skill-based forecasting.

Forecast > Published forecast | on the AHT graph, the Forecasted vs Actual lines are reversed in both the values and colors.

Typo: Forecast > Working forecasts > Forecast worksheet | Working forecast staffing requirements | Generate Clusters: There's a typo in the tool tip in the working forecast worksheet. "Forecastgin" instead of forecasting.

Schedule > Working schedules > Schedule worksheet | Printer-friendly Schedule Reports: Schedule detail by date — the downloaded xlsx or csv reports is showing only agent's name and not showing the schedule details.

Reports

Report > Contact Volume: AHT calculation for Media types and Executive Summary are not accurate/matching the manual calculations.

Report > Contact volume | Show the data source report: Contact volume by data source report: Collection point – top row was blank. Now shows All Collection Points.

Report > Schedules | Event: rounding issues after dragging and dropping the event – displaying event with duration of 20 minutes as 19 minutes.

Report > Published Schedule: Clicking on Apply options, the schedule is not refreshing the report but when viewed in the "Show this report in full-screen view", the schedule for the week displays correctly.

Report > Published schedule > Shrinkage report: unable to see shrinkage data for periods before current date (today).

Report > Published schedule > Schedule analysis | Show the compact service metric summary: After clicking apply options report is not loading and throwing an error on the console.

Report > Published schedule > Schedule analysis | Show the full-service metric summary: After clicking apply options report is not loading.

Report > Published schedule > Published event summary: denied hours are being included in the calculated hours for Paid / Not paid, Work / Not at work, Queue / Not in queue, etc.

Report > Published schedule | Shrinkage report: when you choose time zone and click apply options, a 404 error is reported.

Report > Published schedule > Schedule details | Custom user group: when using Create New Work Intervals option in a published schedule for a custom group, the agents you can choose to include in the event is different than the actual custom group.

Report > Published schedule | Shrinkage report: on the show option section it is not supposed to show the time zone until you select "use selected time zone" on the time zone dropdown.

Published & Adherence Schedules | Scheduled Events | Edit: edited scheduled events are not displaying correctly. The end time of the edited event is not triggered/calculated correctly and showing the old end time.

Published & Adherence Schedules | Scheduled Events | Delete: scheduled events do not get deleted after attempting to delete from the schedule.

Report > Intraday analysis > Intraday performance monitor: when you choose time zone and click apply options gives 404 error.

Report > Schedule adherence > Daily schedule adherence | Automatic refresh interval: when selecting the option "Do not refresh the report", it will spawn a nearly infinite number of refresh requests causing high CPU usage. As a result, few changes to the UI are made on the Global settings & preferences as well as the report options for automatic refresh interval.

Report > Schedule adherence > Daily schedule adherence | Enterprise model: when you "Use corporate time zone" and create event interval, it is giving an error while saving.

Report > Schedule adherence > Daily schedule adherence | Show the supervisor report: When creating new work intervals, inconsistent behavior between the published schedule report by agent and the schedule adherence report by agent.

Typo: Report > Schedule adherence > Adherence alerts: Columns is misspelled (in Columns per row).

API Help

Community Help Page: the API link page is breaking with the error - Server Error in '/CommunityWebApi' Application.

Known/Deferred Issues

Home Page / Today

Automated Schedule Attendance Monitor | When you are viewing today's summary and click on PM data, then go back to viewing AM data, it is showing different date (not today's date).

Notifications

Settings > Application settings > Administrative settings > Notifications: there is no memo settings for ' Time off request updated'. This memo option will be removed as memos are sent for *Time off request status change*.

All things time off

Time Off: Agent View: Plan > Time Off Requests: when entering the details and clicking tab, it is highlighting the dropdown lists, but user cannot make selection using keyboard.

Advanced PTO: Plan > All things time off > PTO Calendars > Working accrual calendars | Accrual Tables | Import from Excel: error is reported in console and not all transactions are imported when:

1. Using an existing file/a file that was already uploaded
2. Using the option 'Import all including Warnings'

Advanced PTO: Agent View: Plan > Time off worksheet | Calendar partitions | Time off bid rounds: when the calendar partition and bid monitor service are running all the time and the agent's PTO bid exception is approved by the admin, the block status does not auto-update to Valid status.

Advanced PTO: Agent View: when brownout rule is configured with one fixed approved request per day in a partition and one agent has committed the block for 40 hours, another agent is also able to commit the block if that agent requests multiple blocks with the same date range.

ASAP

Schedule > ASAP Calendar | Modify Current Schedule | Optimize Off-phone Events: page times out after 5 minutes after executing the plan (although the execution completes successfully in the background past the timeout value).

Schedules & Reports

Schedule > Working schedules > Schedule worksheet | Printer-friendly Schedule Reports: Schedule detail by participant — when you download an xlsx or CSV, the report is not showing the agent's name.

Report > Schedule adherence > Schedule adherence summary | Enterprise Model: Inactive agents are showing on the Schedule adherence summary report.

ASAP | Choose people | Automatically update net line statistics: 'Automatically update net line statistics' checkbox is always grayed out: This option is only available for the "Plan a meeting" ASAP type when choosing a start time and then finding the meeting participants based on the fixed meeting time.

Schedule > ASAP Schedule | Decrease Available staff | Plan a meeting: Choose people — when you click Choose your meeting start date and time, date picker is missing.

Report > Schedule adherence > Daily schedule adherence report | Report options | Through date | Auto refresh interval: The auto-refresh selection list is set to null if the 'Through date' is set to any values other than today's date because auto-refresh ONLY applies to today's date as the report date.

Report > Schedule adherence > Daily schedule adherence | Enterprise model: when you "Use corporate time zone" and "Convert work event to time off," it is giving an error while saving.

Report > Schedule adherence > Daily schedule adherence & Schedules | Enterprise model: using custom time zone, manually created event(s) use the agent's default time zone not the selected time zone.

Schedule > Working schedules > Schedule worksheet | Printer-friendly Schedule Reports: Schedule detail by date — the downloaded xlsx or CSV report name is encoded with a URL (e.g., (Schedule+detail+for+Areheart%2c+Sam++on+Monday%2c+28+03+2022) instead of the report name with the agent. As designed because the name is "url encoded" to allow it to be downloaded; the name is derived from the title attribute of the enclosed div.

Report > Published schedule > Published event summary | Enterprise model: the Published event summary event detail report is showing start and end times as N/A - N/A even though PTO event has defined start and end times.

Settings > Schedule templates > Schedule templates > Existing schedule templates | after adding schedule template and clicking save, "Organize your schedule template " is not aligned properly.