Release Notes for Cisco Workforce Optimization Quality Management Release 2.4(1)

Revised: April 2, 2009

These release notes describe the new features for Cisco Workforce Optimization Quality Management Release 2.4(1).

Use these release notes in conjunction with the Quality Management 2.4 documentation.

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System Requirements

Quality Management 2.4(1) is compatible with the following Cisco Unified Contact Center environments:

Cisco Unified Contact Center Express Version	Cisco Unified Communications Manager Version
5.0(x)	5.1, 6.0
6.0(x)	6.0

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New and Changed Information

Quality Management 2.4 has the following new features:

- Workflows can be configured to record outbound as well as inbound calls
- Support for Microsoft Windows Vista Business, Enterprise, and Ultimate editions (except for screen recording, which is not supported on Vista at this time)
- Support for off-board Microsoft SQL Server
- Screen recording (Enhanced bundle only)
- External storage of screen recordings
- Reports available in Microsoft Excel format
- Reports webpage uses a Secure Sockets Layer (SSL) connection

Bundle Name Differences

The name of the two feature bundles available in Quality Management are expressed in two different ways, as shown below.

Name in QM Documentation	Name Elsewhere
Quality Management Standard	Quality Management Basic
Quality Management Enhanced	Quality Management Advanced

Upgrading

To upgrade from QM 2.3 to QM 2.4, follow these steps.

Services

Step 1 Shut down all QM services except LDAP.

Step 2 Ensure that the backup folder and all its subfolders (C:\Program Files\Common Files\SQM\backup) are empty.

Step 3 Back up LDAP and the SQM database for disaster recovery purposes. Open a command window and navigate to the following folder where the Backup and Restore utility (bars.exe) is located:

```
C:\Program Files\Cisco\WFO_QM\bin
```

Step 4 Enter the command line:

```
bars.exe -BL -BD
```

If SQL Server is not located on the QM Database Server, use the following command:

```
bars.exe -BD -d<path>
```

Where <path> is a location on the SQL Server machine to store the database backup.

Step 5 Shut down the LDAP service.

Step 6 Shut down and disable the SQL Server instance.

Step 7 Uninstall any service releases that have been installed. This causes an auto reboot.

Step 8 Uninstall the old version of QM, and then reboot the computer.

Step 9 Install QM 2.4.

Step 10 When QM Configuration Setup starts (a dialog box asking for the IP address of QM Directory Services appears), click **Cancel**.

Step 11 In the Installation wizard, click **Finish**.

Step 12 Start the Quality Management LDAP Monitor service.

Step 13 Open a command line and navigate to the following location:

```
C:\Program Files\Cisco\WFO_QM\bin
```

Step 14 Enter the following command:

```
convert.bat "C:\Program Files\Common Files\SQM\backup\ldap" 2.4.1
```

Step 15 Enter the following command:

```
bars.exe -RL -d="C:\Program Files\Common files\SQM\transformDir\final"
```

Step 16 Start the SQL Server instance.

Step 17 Run QM Configuration Setup to completion. The executable is located at:

```
C:\Program Files\Cisco\WFO_QM\bin\postinstall.exe
```

Client Applications

Once the Microsoft Installer (MSI) files for the QM 2.4 desktop applications are available (after QM Configuration Setup has run on the QM Services server), QM Administrator, QM Desktop, and QM Recording can be installed on any desktop over the QM 2.3 versions of those applications.

Limitations and Workarounds

Quality Management Recordings Exceed Upload Limits Set in QM Administrator

Symptom: An agent uploads more Quality Management recordings in one day than is configured in the Number Recordings/Agent/Day field on the Workflow Administration > Workflow window in QM Administrator.

Description: Agents using multiple PCs in a single day may upload more Quality Management recordings than the number specified in the Number Recordings/Agent/Day field.

Workaround. Have the agent use only one PC per day.

Stopping QM CTI Service During Calls May Corrupt JTAPI User

Symptom: The JTAPI user becomes inaccessible when the QM CTI Service restarts.

Description: Stopping the QM CTI Service on the QM CTI server machine may corrupt the JTAPI user on the Cisco Unified CM. This has been seen intermittently on Cisco Unified CM 5.0.

Workaround:

Step 1 In Cisco Unified CM, delete the existing JTAPI user.

Step 2 Create a new JTAPI user and associate all phone devices with that user.

Step 3 In QM Administrator, enter the new JTAPI username and password on the Site Configuration > Cisco Unified CM window.

Step 4 Restart the QM CTI service.

RTP Codec G.722 is Not Supported

Symptom: Recordings are 1KB in length.

Description: If voice recordings are 1KB long, no RTP traffic is being recorded. The recording client filters out any codecs it does not support.

Workaround: Configure the phone device so that it does not use the G.722 codec.

Standard Bundle QM Configuration Setup Prompts for Screen Recording Storage Location

Symptom: Users are given the option to configure the screen recording storage location during QM Configuration Setup during a Standard Bundle installation.

Description: Since the Standard bundle doesn't include screen recording, configuring this setting will have no effect.

Workaround: Ignore the option to configure where to store screen recordings during QM Configuration Setup.

Open Caveats

The following issues are open in QM 2.4(1).

Note You can view more information and track individual QM defects using the Cisco Bug Toolkit located at: http://www.cisco.com/cgi-bin/Support/Bugtool/launch_bugtool.pl

Table 1 Open caveats in release 2.4(1).

Identifier	Severity	Headline
CSCsl03373	3	After install desktop reports do not display
CSCsl03387	3	SSL Port Exclusion not added to firewall
CSCsl04468	3	Evaluator can't access recordings to score them

Resolved Caveats

The following issues were corrected in QM 2.4(1).

Table 2 Resolved caveats in release 2.4(1).

Identifier	Severity	Headline
CSCsi98597	2	Exception on voice file closing causes subsequent recordings to be lost
CSCsi98421	3	Recording files stranded in Staging folder after reboot
CSCsi98491	3	Install process does not check for SR installs on client or server
CSCsi98545	3	AD Linking: Shows error when AD server reaches max search result limit
CSCsi98560	3	Upload processing gets stuck in “Already Processing” loop
CSCsi98577	3	Calls with same filename created after recovery to LDAP
CSCsi98583	3	Reports—Generic msg for when browser session times out
CSCsi98590	3	Blank spaces are allowed when creating new user
CSCsi98595	3	Uploads get stuck in “Invalid handle” loop

Documentation Updates

This section describe the changes made to QM 2.4 documentation after its release.

Quality Management Administrator User Guide

Date Revised: November 12, 2007

Page Number: 59–61

Updated Text: The section, “Setting Up Classifiers” is replaced with the following text.

Setting Up Classifiers

Classifiers are filters that determine which calls are recorded.

You can set up multiple classifiers for a workflow. They are executed in the order they are listed (from top to bottom) in the workflow navigation tree. This enables you to create classifiers that are subsets of more general classifiers.

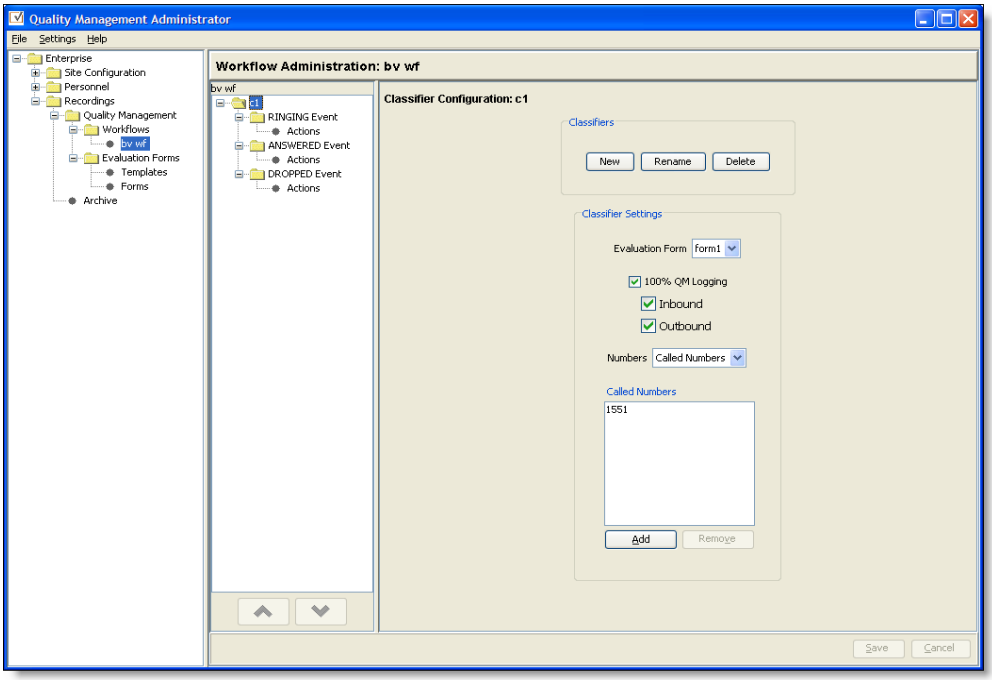
To change the order of classifiers in the navigation tree, select the classifier and use the Up and Down arrow buttons to move it up or down in the navigation tree.

To set up classifiers:

Step 1 Under the Workflow node, select the workflow you just created.

The <workflow name> Workflow Classifiers window appears.

Figure 1 Workflow Classifiers window.



Step 2 In the Classifiers section, click **New** to create a new classifier.

The Classifier Name dialog box appears.

Step 3 Enter a name for your new classifier, and then click **OK**.

The new classifier is now listed in the workflow navigation tree.

Step 4 Select the new classifier in the workflow navigation tree.

Step 5 In the Classifer Settings section, complete all fields as follows:

Field/Option	Description
Evaluation Form	Select the form you want to use to evaluate the recorded calls.
100% QM Logging	Select this option if you want to configure a classifier that does not use rules, but rather records all calls defined by the classifier.
Inbound and/or Outbound	Select which calls to be recorded—inbound, outbound, or both. You must select at least one call direction.

Field/Option	Description
Numbers	Select the type of number you want to use to filter the calls to be recorded, Called Number or Calling Number. The Called Number is either the route point number if the call was routed, or the agent extension if it was direct dial. The Calling Number is the original number from which the caller is dialing. **Note**: If you change your selection here from Calling Number to Called Number or vice versa after entering phone numbers in the Called/Calling Numbers field, all entered numbers will be lost. You will have to define them again.
Called/Calling Numbers	Click **Add** to specify the phone numbers you want to filter for in the Numbers field. You can enter: • Specific numbers (for example, 6125551212) • Number ranges using wild cards (for example, 612*, where the * wild card stands for any number of digits, or 612555????, where the ? wild card stands for 1 digit) • The * wild card to record all calls The numbers you enter cannot contain dashes or parentheses, and must be between 1 and 16 characters long.

Step 6 Click **Save** to save the classifier settings.

Note: If you did not select 100% QM Logging, you must now configure at least one rule. See "Setting Up Rules" on page 63 for more information.

Quality Management Installation Guide

Date Revised: January 23, 2008

Page Number: Page 47

Updated Text: New text is added after the section,"Upgrading From Previous Versions" as follows:

Upgrading Feature Licensing

Upgrading the QM 2.4 feature set from QM Basic to QM Advanced requires that your licenses are changed to reflect the upgrade. This is done by running the Cisco Unified Workforce Optimization Basic to Advanced Quality Management Upgrade CD on your QM server.

To upgrade from QM Basic to QM Advanced:

Step 1 Insert the upgrade CD in the server that hosts the Quality Management base services.

Step 2 Run the utility <CD drive letter>:/upgrade.exe.

A dialog appears asking you to confirm that you want to run the utility. Click OK. The upgrade process will run. You will not receive any message that the upgrade is completed.

Step 3 Navigate to C:\Program Files\Cisco\WFO_QM\bin (default location) and double-click postinstall.exe to launch QM Configuration Setup.

Step 4 Select the Recording File Storage Location window, and verify that the storage locations for voice and screen recordings displayed are correct. See page 37 for information on changing the storage locations if required.

Step 5 Start Quality Management Administrator and modify existing workflows to start and stop screen recordings. See the *Quality Management Administrator User Guide* for more informaiton.

Step 6 On each desktop client, restart the QM Recording client.

Date Revised: February 18, 2008

Page Number: Page 13

Updated Text: Table 4 is revised as follows:

Table 4. QM central server capacity guidelines

Single Server Hardware	Maximum Number of Named Users	Maximum Number of Concurrent Agents
MCS-7816	450	150
MCS-7825	900	300
MCS-7835	1500	500
MCS-7845	3600	1200

Date Revised: May 5, 2008

Page Number: Page 59

Updated Text: The section “Removing QM” is amended as follows.

Uninstall QM in the following order:

1. QM Recording
2. QM client applications
3. QM services

QM Files Not Removed Automatically

The following files are not removed automatically when you uninstall QM, and must be manually deleted if you want to completely remove QM from your system:

- Audio and video recordings
- QM databases SQMDB and SQMREPORTDB

Recordings are maintained in the folder located at:

Server: C:\Program Files\Common Files\QM\Recordings

Clients: C:\Program Files\Common Files\SQM\Recordings

Note that this is the default location and that a custom location might have been set up for your system.

The QM databases, SQMDB and SQMREPORTDB, can be removed using SQL Server 2005 Management Studio or SQL Server 2000 Enterprise Manager, depending on which version of SQL Server you use.

Note If these databases are removed, all QM historical data will be lost.

Date Revised: April 2, 2009

Page Number: Page 23

Updated Text: The section "Installing SQL Server 2005" is amended as follows.

Add the following note to this section:

NOTE: When installing SQL Server 2005, you must select the Mixed Mode option in the Authentication Mode window.

Change Step 4 of the procedure, "To create a SQL Server user login" to the following text and note:

4. On the General page, enter a name for the new login, select SQL Server Authentication, enter a password, clear the Enforce password policy check box, and choose English as the default language.

NOTE:The QM database uses the English date format. If the SQL user is assigned a language other than English, the language might use a different date format, causing DBProxy and Sync service errors. The SQL user must use English as the default language.

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, security guidelines, and also recommended aliases and general Cisco documents, see the monthly What's New in Cisco Product Documentation, which also lists all new and revised Cisco technical documentation, at:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

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