

Agent Release Notes

v11.2

EMPLIFI AGENT
NOVEMBER 2022

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Introduction

This document describes the upcoming software changes in Astute Agent version 11.2. This document does not cover previous releases.

Astute Agent version 11.2 is a SaaS-only deployment. In this release, System Manager will have limited functionality. If you are a SaaS customer, the required changes will be made during your upgrade.

Most changes to the software are available immediately after you upgrade; however, some changes may require setup or configuration before you can use them.

Users of Internet Explorer (IE) Browser

Important: Microsoft ended support for Internet Explorer (IE) on June 15, 2022. Please visit the [Lifecycle](#) page on Microsoft's website for more information.

Emplifi Inc. supports the latest versions of the Chrome, Edge (including Chromium), and Firefox browsers.

Users of ePowerCenter Earlier than 10.0

Emplifi Inc. no longer provides Development support for ePowerCenter versions earlier than 10.0. Please contact your Customer Success Manager to plan for an upgrade.

Users of PCEmail using CIC 2015 R1 and Earlier

Emplifi Inc. no longer provides support for CIC 2015 R1 and earlier versions for PCEmail users. Please contact your Customer Success Manager to plan for an upgrade.

Help File

The Astute Agent Help provides detailed documentation on how the system works. To display the Help topics provided in your most recent upgrade, click the **Help** button (or press [Ctrl + F2]) in either the Classic or Standard interface.

Standard Interface



New Features

Improved the process for managing Favorites

A11-5; A11-693

The Favorites feature now has a new menu and new pages for managing favorites. The Favorites drop-down menu allows you to access two new pages: My Favorites and Manage Favorites. The My Favorites page functions similarly to the previous version of Favorites. It allows users to manage their favorites and folders. A new Manage Favorites page allows an administrator to search, view, and manage all favorites for all users.

From the Home Page function bar, select either **Reports > Reports Admin** or select **Utilities** and the Favorites drop-down menu will display. Select **Favorites** to view a list of menu options. Below is an example of the Favorites menu when accessing it from Reports Admin.



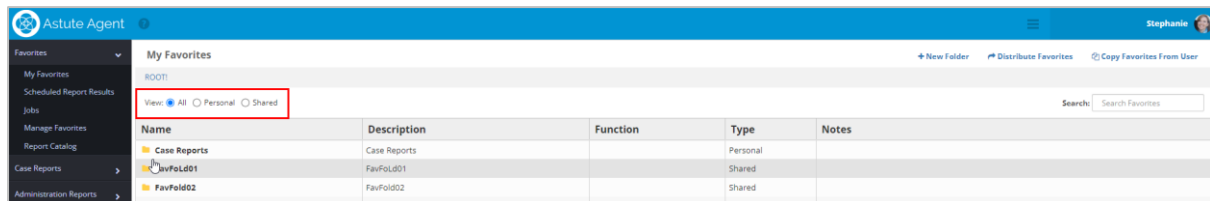
When accessing favorites from Reports Admin, you can choose to view the following pages: My Favorites, Scheduled Report Results, Jobs, Report Catalog, and Manage Favorites.



When accessing favorites from Utilities, you can choose to view the following pages: My Favorites, Scheduled Report Results, Background Process Status, Jobs, and Manage Favorites.

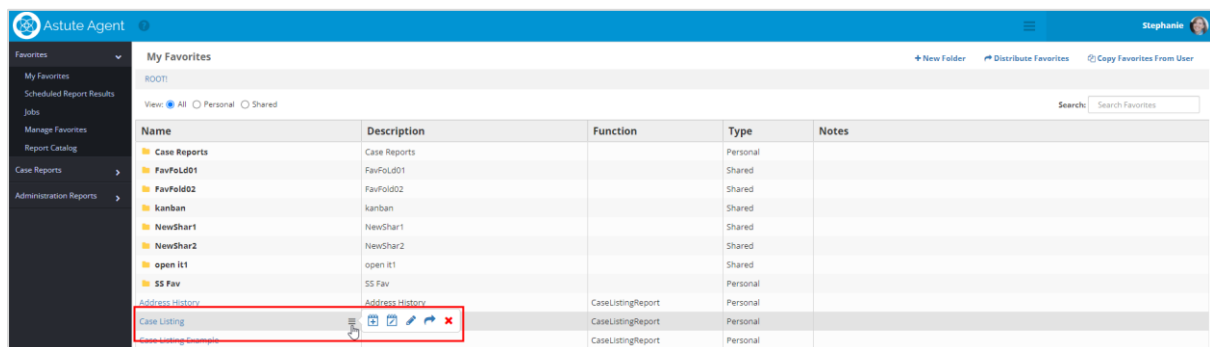
Important: The navigation for Scheduled Report Results, Jobs, Background Process Status, and Report Catalog has changed. These options are only available from the Favorites menu.

The My Favorites page allows you to create personal or shared favorites that you can share with other teams or individual users. There are three views available for this page:

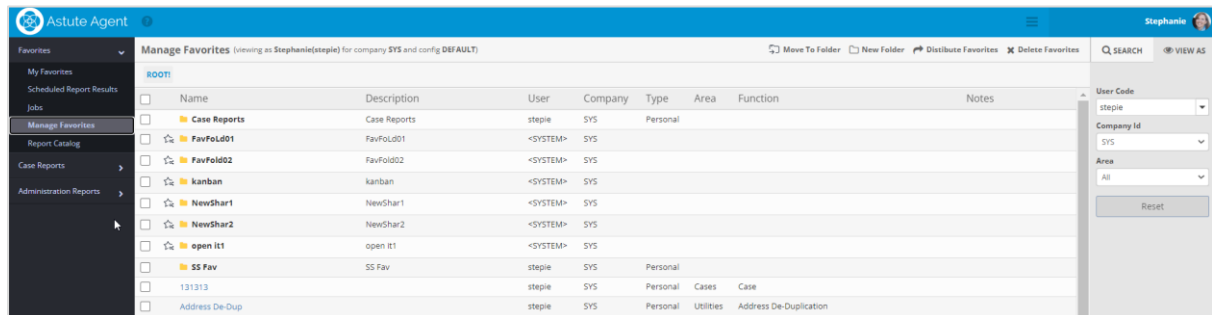
- **All** – allows you to view all your personal and shared favorites.
- **Personal** – allows you to view only your personal favorites.
- **Shared** – allows you to view only shared favorites.



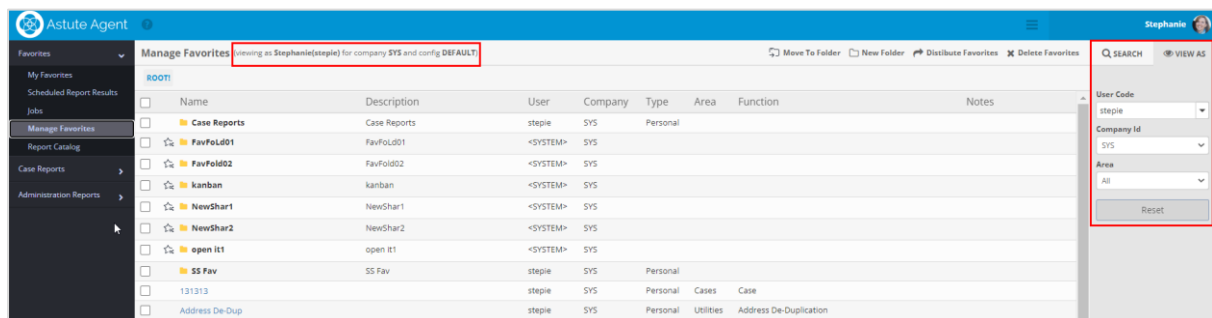
By hovering over a personal favorite or folder, a tool menu button  will display. Selecting the menu button  will open tool options for scheduling, editing, distributing, and deleting the favorite.



The Manage Favorites page is a new page that will display all favorites in the system. This page is only visible to an administrator with the new `w_admin_favorites` permission. If an administrator has the proper permission, they can view, organize, and manage favorites for specific users.



Selecting the **View As** button allows you to view and manage favorites for a specific user. The Manage Favorites banner will display the “viewing as” username, user ID, and company ID for the favorites you are currently viewing on the page.



This page functions similarly to the My Favorites page. For more information, refer to the Agent Help.

Added the ability to create Personal or Shared Favorites and Folders

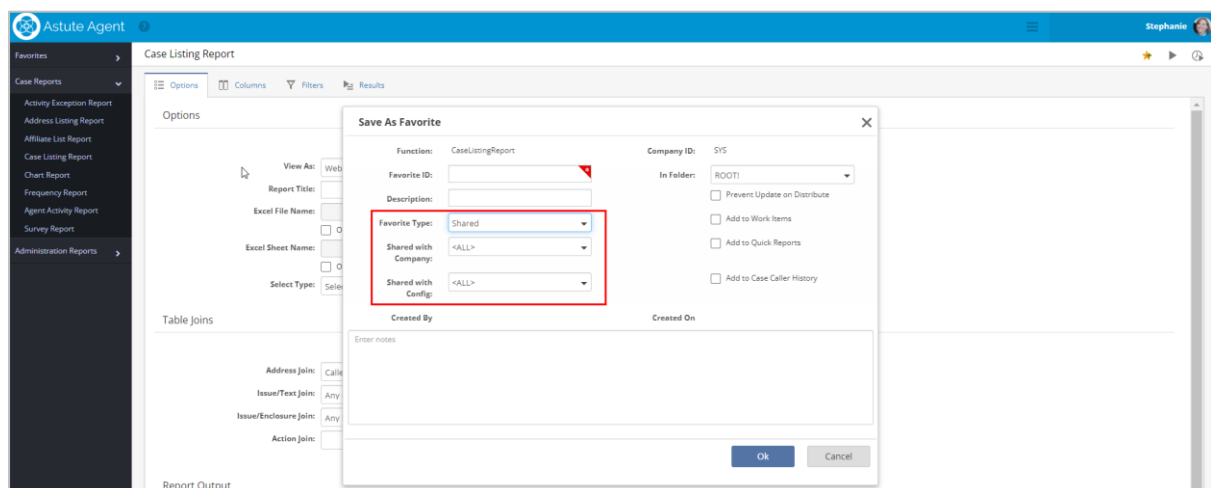
A11-749

The Favorites feature now has two favorite types: Personal and Shared. On either the My Favorites page or Manage Favorites page, the Type column will identify whether the favorite or folder is shared with other users or personal to you.



Name	Description	Function	Type	Notes
Case Reports	Case Reports		Personal	
FavFold01	FavFold01		Shared	
FavFold02	FavFold02		Shared	

When you create a new favorite, you will select the type of favorite it is on the Save As Favorite window. If the favorite will be shared, you can choose the company and configuration with which to share it.



Function: CaseListingReport

Company ID: SYS

Favorite ID:

Description:

Favorite Type: Shared

Shared with Company: <ALL>

Shared with Config: <ALL>

Created By:

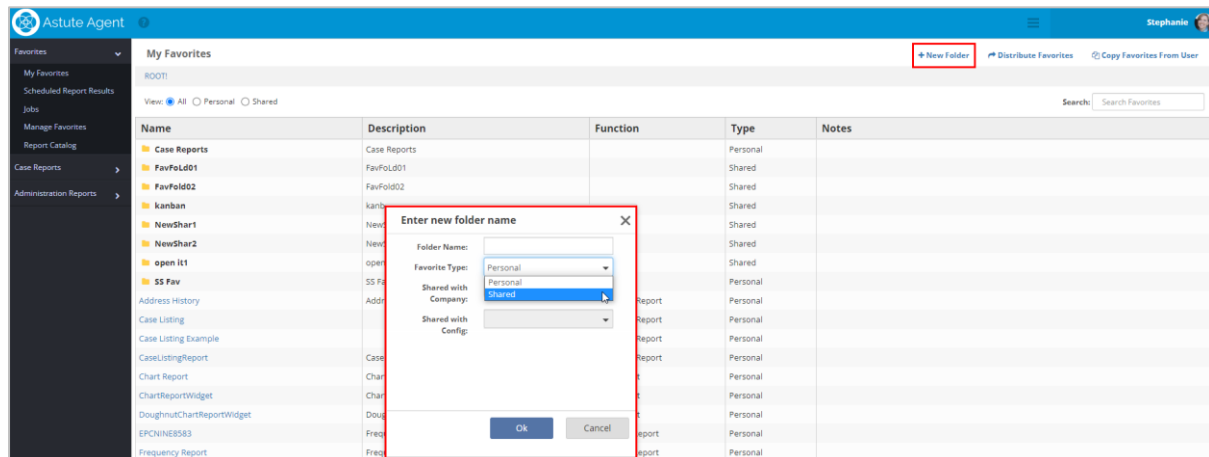
Created On:

Enter notes:

OK Cancel

Similarly, when you create a new folder, you will name the folder and select “Personal” or “Shared” in the **Favorite Type** field. If you select “Shared”, you can choose the company ID and configuration with which to share it.

Note: When naming a shared folder, we recommend that you add a prefix to the name to indicate that it is a “Shared” favorite folder.



Important: After saving the new folder or favorite, the **Favorite Type** setting cannot be changed.

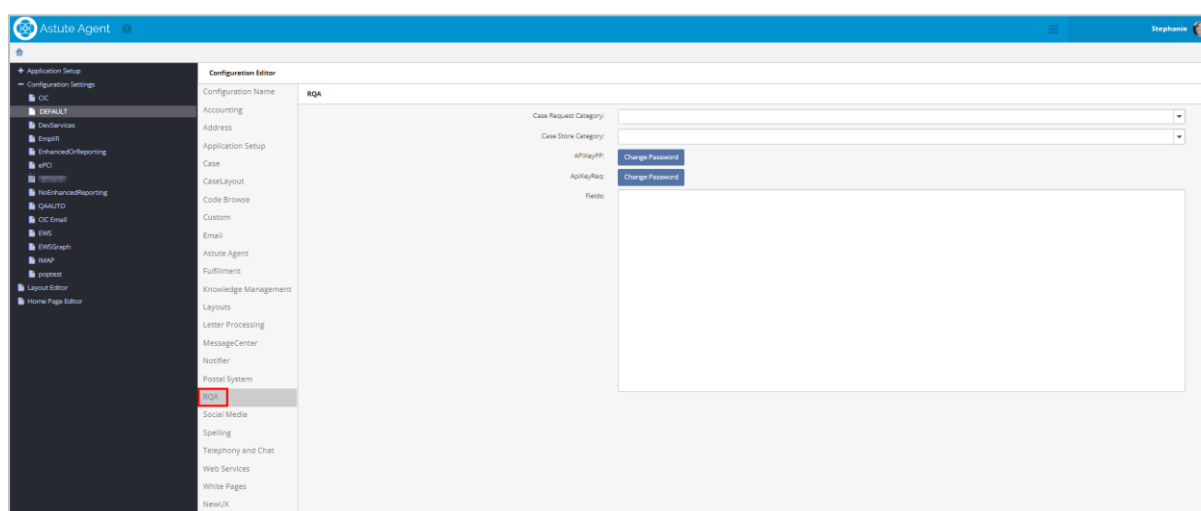
Added a new RQA feature

A11-511

A new RQA feature is added for submitting and tracking requests to retrieve a product from a customer or retail location.

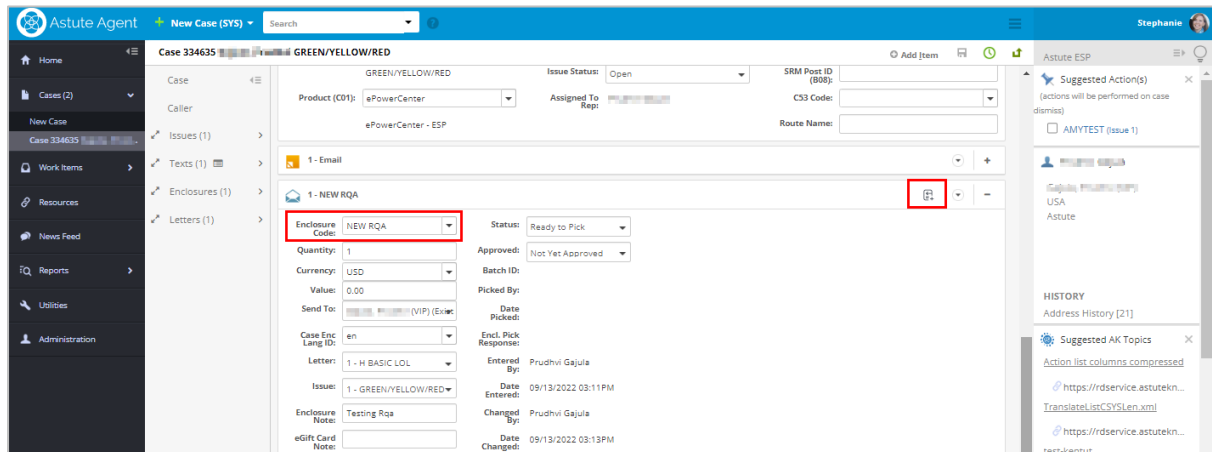
For an agent to use this feature, an administrator *must* define an F code for the Case Request Category. The F code must be set up as “String” with the Capitalize Type set to “None.” Then, a new RQA Enclosure Code is created for the case Enclosure Type field.

Next, the administrator will set up the RQA configuration on the Configuration Editor.



More information on implementing this feature is available in the *Agent RQA Implementation Guide*.

Once this feature is configured, an agent will add an enclosure with the **Enclosure Type** field set to "RQA". Then, select the new **Create RQA Return Project** button on the Enclosure banner. This will open the RQA Return Project form. The agent will fill out the form and click **Submit**.



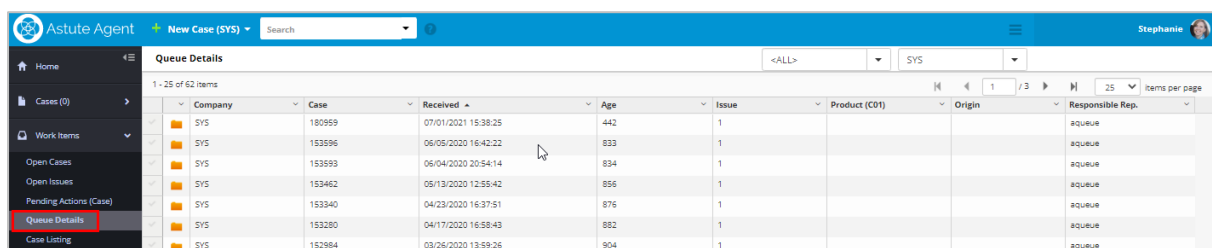
After the RQA form is submitted, clicking the **RQA Return Project** button again will allow an agent to view the status.

Note: Agents will need internet access to use the RQA feature.

Added Queue Details item to Work Items list

A11-712

Queue Details is a new item that can be accessed from the Work Items list. When the **Queue Details** option is selected, an agent can view the case data, issue data, and case text in their queues. Once an agent selects a case from the Queue Details, they are prompted to accept the case transfer.



Company	Case	Received	Age	Issue	Product (C01)	Origin	Responsible Rep.
SYS	180959	07/01/2021 15:38:25	442	1			aqueur
SYS	153596	06/05/2020 16:42:22	833	1			aqueur
SYS	153599	06/04/2020 20:54:14	834	1			aqueur
SYS	153462	06/13/2020 12:55:42	856	1			aqueur
SYS	153340	04/23/2020 16:37:51	876	1			aqueur
SYS	153280	04/17/2020 16:58:43	882	1			aqueur
SYS	152984	03/26/2020 13:59:26	904	1			aqueur

Note to Administrators: The new w_view_queue_details security permission for this item is only given to FULLACCESS roles by default.

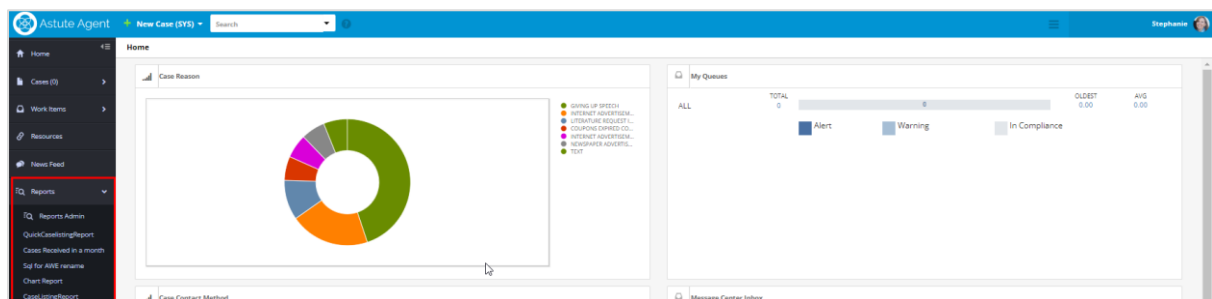
Added Quick Reports List

A11-54 AND A11-731

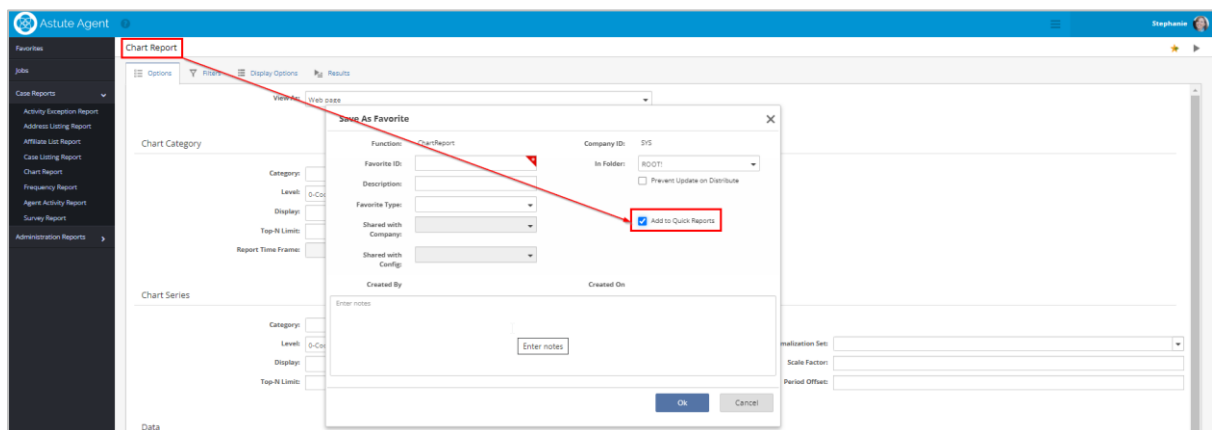
A new Quick Reports list is added to the Home Page function bar. This will allow for easy access to certain frequently used report favorites. The report favorites that can be added to the list are Case Listing Report, Chart Report, Frequency Report, and SQL Select Report.

From the function bar, selecting **Reports** will open a drop-down menu with the following options:

- **Reports Admin** will open the Reports Administration page.
- **Quick Reports** will display a short list of important report favorites. Selecting a report from this list will display the report results on the page.

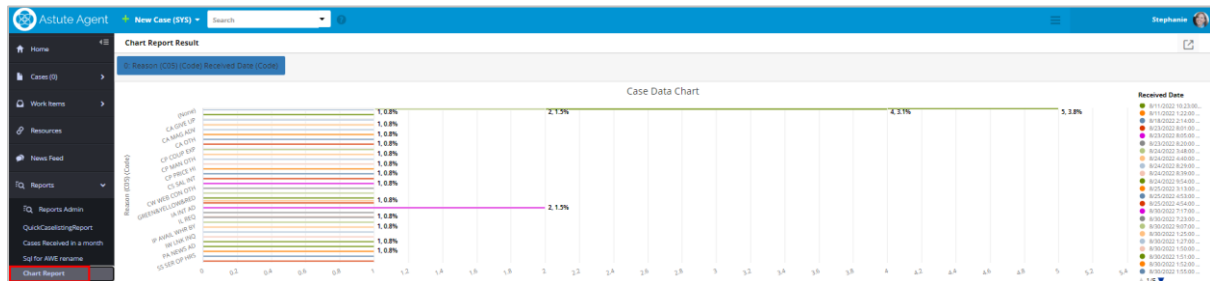


To have a report show up on the list, you need to save it as a Quick Report. When the report favorite is created, select the **Add to Quick Reports** check box on the Save As Favorite window. This will add the report to the Quick Reports list.

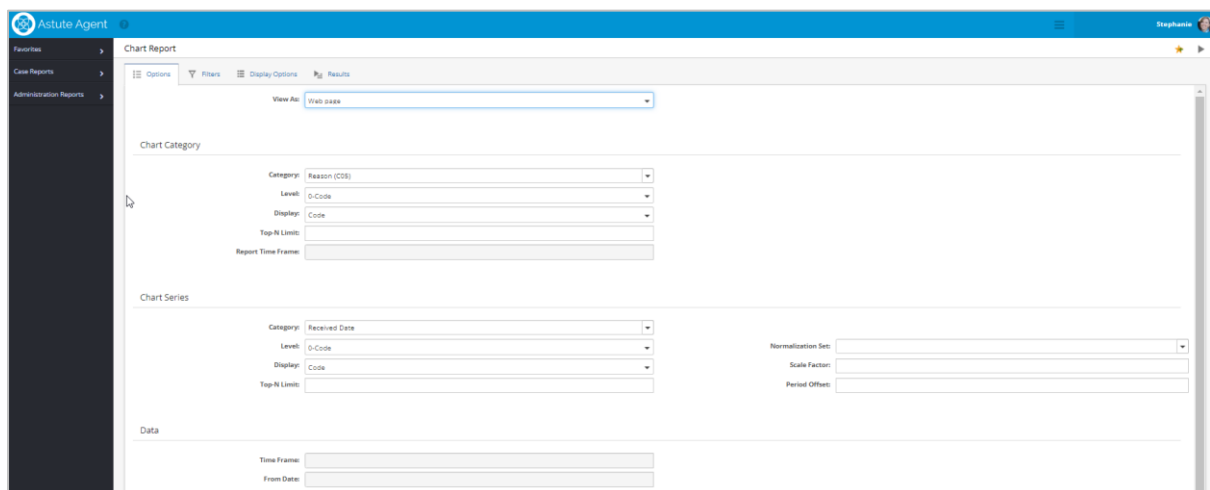


Note: Quick Reports is a *short* list of reports that can be quickly accessed from the Home Page. This is meant for frequently used reports only. This is not meant to be used for a long list of reports. We recommend using My Favorites for accessing most of your report favorites.

When a report is selected from the Quick Reports list, the report results will display. The results have full functionality and allow you to drill down to obtain more granular information on a specific item. To refresh the report, simply click the report title in the Quick Report list.



When you select the **Report Admin** button  on the banner, you are redirected to the report options page in Report Administration.



Summary of new features for version 11.2

New Feature Description	User Impact	Case ID	Project ID
Added a new Manage Favorites page for administrators to use if they have w_admin_favorites permission.	Administrators	126434	A11-5
Added a new Favorites drop-down menu with options for accessing new and existing pages.	Administrators		A11-693
Added a new Quick Reports option on the Home Page function bar. This will allow easy access to frequently used report favorites.	ALL		A11-54
Added the option to choose between outbound call and SMS, if both are set up in your system.	Agents		A11-451
Improved logging for the Address Redaction Utility.	Administrators	234991	A11-498
Added a new Case Audit Trail Report to show case data tracking such as date, time, and user ID for all case data additions, updates, and deletions.	Administrators		A11-507
Added RQA feature for initiating and tracking a product retrieval request from a customer or store.	ALL		A11-511
Enhanced Mass Mailing so that an email subject with [case.case_id] will substitute the case ID.	Administrators	119140; 239735	A11-562
Improved the Queue interface to allow an administrator to edit the list of responsible agents.	Administrators		A11-668; A11-754
Added a new Queue Details item to display in the Work Items list. A new w_view_queue_details security permission is added for this feature.	ALL		A11-712
Added the ability to show Chart Reports in the new Quick Reports feature.	Administrators		A11-731

New Feature Description	User Impact	Case ID	Project ID
Enhanced Graph Email Service to allow outbound emails.	Administrators		A11-669; A11-676; A11-733
Usability enhancements to allow arrow keys to navigate the Layout Editor drop-down lists.	Administrators		A11-761
Added the ability to create a shared Favorites folder. <div> Note: When naming a shared folder, we recommend that you add a prefix to the name to indicate that it is a “Shared” favorite folder. </div>	Administrators		A11-749
Enhanced security for calls from Agent to Knowledge to validate that the server being called is one from a valid list.	Administrators		A11-633
Added metadata endpoint for customers to pull into their Identity Providers.	Administrators		A11-784

Bug Fixes

Summary of fixes to software elements for version 11.2

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an issue with drop-down list displaying behind other user interface elements.	Agents	139734; 230852	A11-81
Fixed an issue where you could dismiss a case with close mandatory fields not filled in. Note: If you have complex close mandatory rules, you may be impacted by this fix. You should evaluate whether you need to update your rules accordingly or train your agents so they are aware that these fields may need to be filled out.	Agents	145394	A11-124
Reduced scrolling for pending actions.	Agents	228859	A11-444
Fixed an issue where nested folders more than 2 levels deep did not show up in the File Maintenance Utility.	Administrators	228604	A11-482
Improved logging for the Address Redaction Utility to clearly show what fields are being redacted on addresses and cases.	Administrators	234991	A11-499
Various updates were made based on recent audits that should not impact users.	ALL		A11-663; A11-684; A11-685; A11-687;
Fixed the Address Service to be able to support Canadian addresses.	Agents		A11-677

Bug Fix Description	User Impact	Case ID	Project ID
Fixed an issue where the favorites for a selected user could not be seen and copied.	Administrators		A11-734
Fixed an issue with editing favorite folder names by giving the option to update the existing name or create a new folder.	Administrators	283697	A11-537
Fixed an issue when distributing a favorite in a folder. If the user it was distributed to did not have that folder, then the favorite was not visible to the user. The favorite will now show up in the ROOT! folder of the user to which it is distributed.	Administrators	242529	A11-650
Fixed an issue with how Smart Search performs case and phone searches.	Agents	247253	A11-738
Fixed an issue with inserting standard paragraphs after a case preview.	Agents		A11-753
Fixed an issue with System Last ID when value is set to less than 8 digits.	Administrators	248097	A11-740
Fixed an issue with BCC field not working in Send Letter Options.	Agents	229450	A11-440
Fixed an issue where uploaded files show an error on the virus scan due to a non-ASCII character in the file name.	Agents	251163	A11-772
Fixed an issue where folder names in favorites were not required to be unique.	ALL		A11-786

Bug Fix Description	User Impact	Case ID	Project ID
<p>Fixed an issue where the Password Attempt Limit was not being enforced.</p> <p>Important: This change may impact users that had exceeded the password attempt limit in v11.1 when attempting to log in to v11.2. An administrator will need to unlock the user using the Clear Locked Users utility.</p>	ALL	250807	A11-741
<p>Added security regarding the passwords stored in the system. The result is that when storing a password in the system, you must first click a Change Password button to make the input box visible.</p>	Administrators		A11-654
<p>Fixed an issue where cases created through Community Inbox were not correctly setting the Action Date and Responses Due Date.</p>	Agents		A11-785
<p>Fixed an issue where there was an error when running a scheduled Chart Report.</p>	Administrators		A11-778

Pre-Release Hotfix

Summary of fixes to software elements for version 11.2.707

Hotfix Description	User Impact	Case ID	Project ID
<p>Fixed an issue impacting specific SSO configurations. There is no downtime or intended impact on other users.</p>	ALL		A11-859

Pre-Release Hotfix

Summary of fixes to software elements for version 11.2.695

Hotfix Description	User Impact	Case ID	Project ID
Fixed an issue with 'Forgot Password' failing to send an email when the Outbound Email Type is Graph.	ALL		A11-835