

# Verint EFM 15.2 FP1 Release Overview

In April of 2018, Verint will release version 15.2 FP1 of the Enterprise Feedback Management (EFM) solution. Verint Public Cloud SaaS customers will receive this update as part of their regularly scheduled maintenance window, and no further action will be required. Customers with special release maintenance criteria will be assigned separate upgrade dates based on mutual agreement with their Verint Account Managers. Customers with the application installed on premise will receive a separate email notifying them that the release is available according to the terms of the maintenance agreement.



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## WFO Organization Synchronization


Building on the Import from WFO functionality introduced in 15.1 FP4, WFO organization synchronization applies any changes made to that hierarchy within WFO to the corresponding hierarchy within EFM on a recurring basis. Changes include moving a user between organizations and updates to users such as email addresses, names and user names.

The Import from WFO screen allows the EFM administrator to easily change the hierarchy that is synchronized from WFO, including adding new organizations and users and deselecting any which are no longer required within EFM.

Synchronization with WFO streamlines user administration for customers using both Verint Workforce Optimization (WFO) and EFM by allowing them to easily provide access to parts of their WFO Organization and keeping that organization up to date with changes made in WFO.

## Configuring WFO Organization Synchronization

WFO Organization Synchronization can be enabled on a per-workgroup basis by the system administrator. It requires both the 'WFO' external source to be enabled and the synchronization settings to be configured at the workgroup level. When the External Source "WFO" is enabled, a "WFO" tab appears within Edit Workgroup. The below configuration options are available to control where EFM should read the WFO files from and how frequently updates should be made based on those files.



 Import from WFO was performed on 1/16/2018 4:46:30 PM.

Enable WFO Organization Synchronization

Import Method:

Path:

File Name:

Import Data at a specific date and time:   

None  Every  day(s)

Daily  Every Week Day


Weekly

Monthly

---

Range of Recurrence

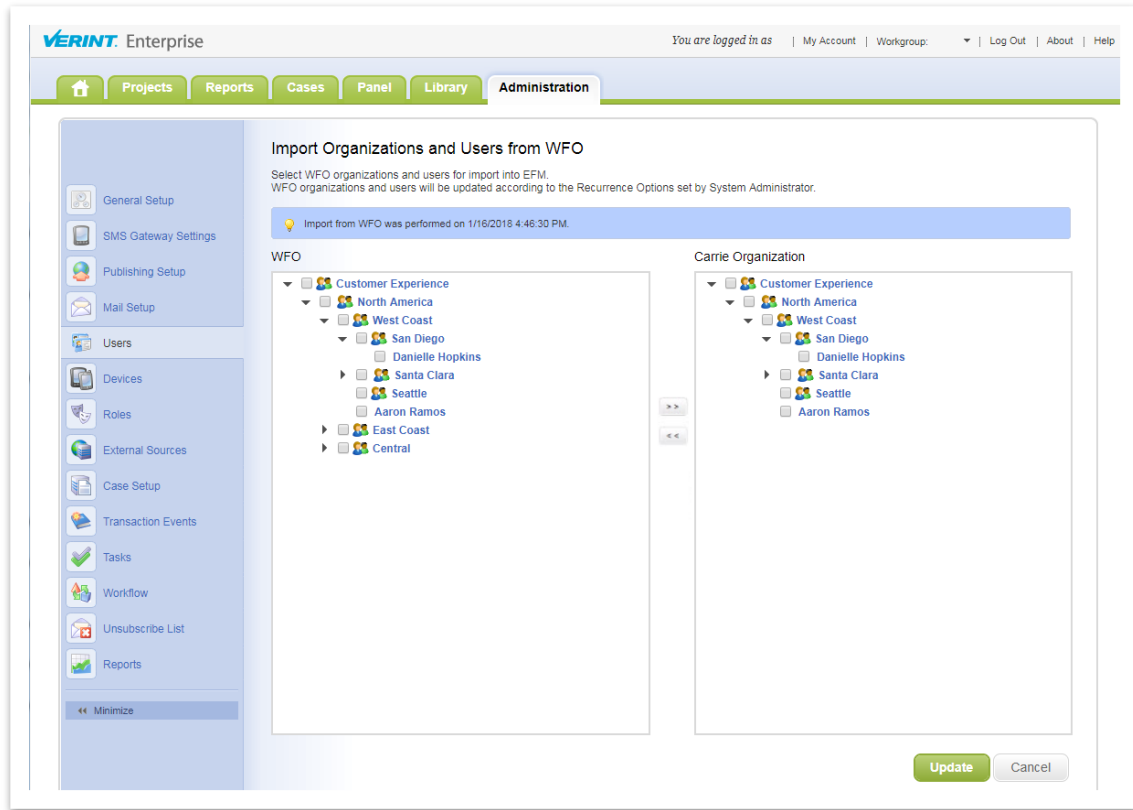
No End Date

End By:  

## Import Organizations and Users from WFO

The 'Import Organizations and Users from WFO' screen is accessible through the 'Import from WFO...' action on the Users screen, present when the WFO external source is enabled and the connection to WFO is configured by the system administrator.

This screen allows the group administrator to control the organizations and users being synchronized with WFO. As well as making these selections, you can also see which organizations and users are available for synchronization and obtain information on the status of the synchronization.



Updated "Import Organizations and Users from WFO screen that now supports updating selections

The administrator can choose to easily select and synchronize the entire organization tree or only a particular branch. Selecting a user will automatically select their organization structure. In addition to controlling the users that will be imported and synchronized, this screen also contains a status of the synchronization, allowing the administrator to see when the last synchronization was performed or when a synchronization is in progress.

## WFO Organizations and Users

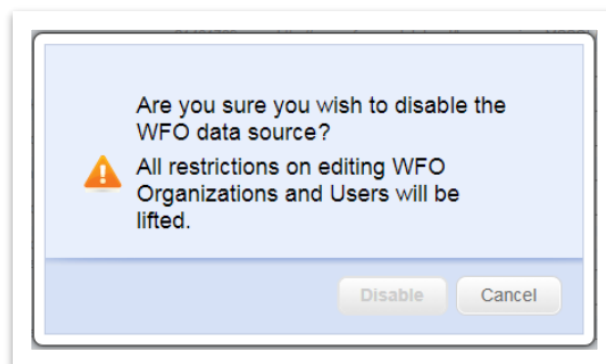
Once imported, an administrator can see the organizations and users that have been imported from WFO on the Users page. There is a special icon on the organization tree to denote the organization from WFO and a "Source" column allows the administrator to differentiate between EFM and WFO users.

WFO users and organizations should be edited within WFO and any field which is synchronized is no longer editable within EFM to avoid the two applications becoming out of sync. If the administrator wishes to remove a user or organization, they are able to do so via the 'Import Organizations and Users from WFO screen'

The screenshot displays the Verint user management interface. On the right, an organization tree shows a hierarchy: Verint (root) -> Internal -> Customer Experience -> North America -> West Coast, East Coast, and Central. On the left, a table titled 'Verint' lists users with columns for User Name, Display Name, Email, Organization, Role, and Source. The 'Source' column indicates whether a user is from WFO or EFM.

<input type="checkbox"/>	User Name ↑	Display Name	Email	Organization	Role	Source
<input type="checkbox"/>	Mark.Hudson@Veri...	Mark Hudson	Mark.Hudson@Verint.com	San Diego	Survey Administrator	WFO
<input type="checkbox"/>	Robert.Wheeler@V...	Robert Wheeler	Robert.Wheeler@Verint.com	San Diego	Survey Administrator	WFO
<input type="checkbox"/>	Craig.Ross@Verint...	Craig Ross	Craig.Ross@Verint.com	Santa Clara	Survey Administrator	WFO
<input type="checkbox"/>	RuthPerkins	Ruth Perkins	Ruth.Perkins@Verint.com	Verint	Group Administrator	EFM

WFO Organization Synchronization can be disabled at any time and these organizations and users will become like regular EFM users and organizations with any restrictions being lifted and no further updates being performed. The administrator will be provided a warning and an opportunity to confirm that the WFO Organization Synchronization feature should be disabled.



## WFO Organization Synchronization Behavior

The below changes will be reflected automatically in EFM as part of each occurrence of the synchronization from WFO:

<b>Organizations</b>	<b>Users</b>
Updating name of organization	Updating name of user
Deleting organization	Updating username of user
	Updating email address of user
	Moving a user to a new organization
	Terminating user
	Deleting user

Any user that is added as part of the synchronization will be granted a default role based on their current role within WFO:

- Admin into EFM as Group Admin
- Manager as Survey Admin
- Supervisor as Survey Admin
- Analysts as Report Author
- Agents as Report Viewers
- All others as Report Viewers

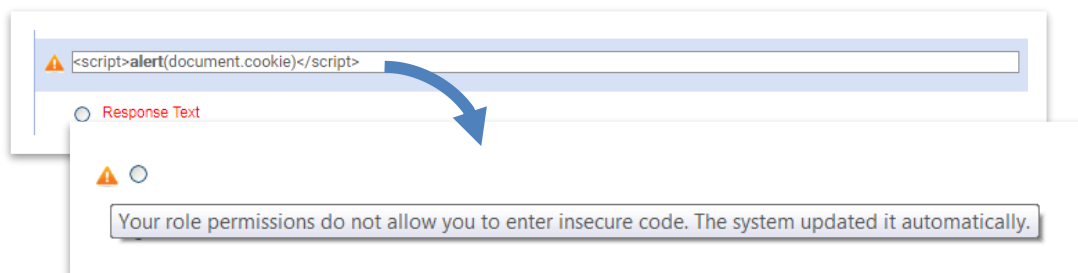
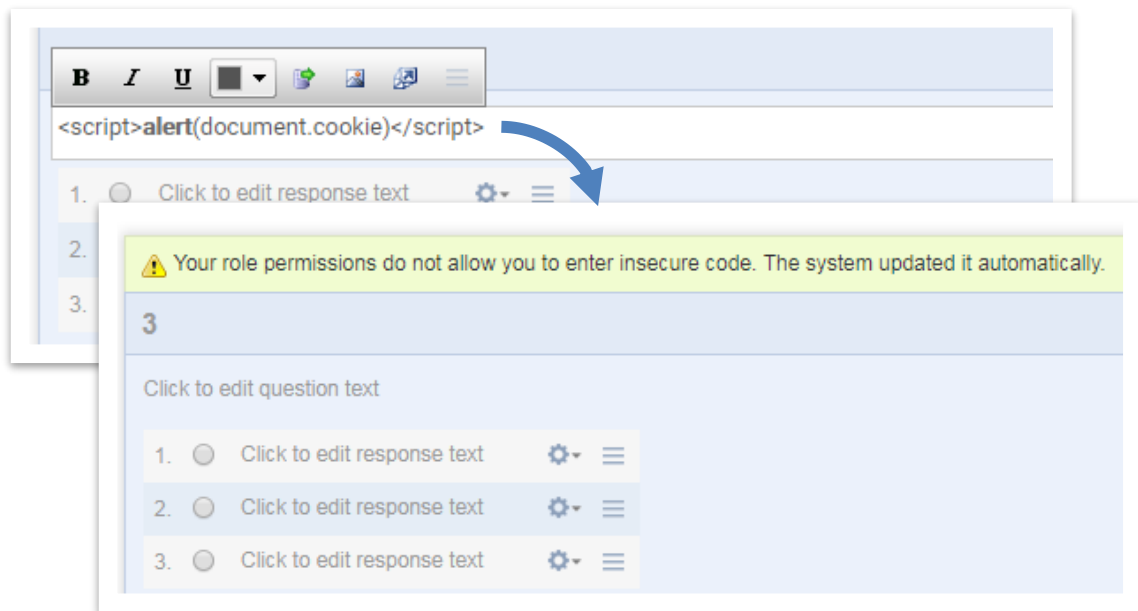
## Survey Designer XSS Protection

A new configuration option available to Group Administrators on the “General Setup” screen titled **“Automatically remove untrusted code from survey designer”**

When checked, any users who do not have the “Edit Code Blocks” permission will have their input within the Survey Designer sanitized and any untrusted code will be automatically removed. Sanitization runs the entered text against an allowed list (whitelist) of safe HTML tags and attributes.

If untrusted code was detected, in addition to removing it a warning message will appear near the element informing the user that changes were made to their entered text.

This applies to text fields within the Survey Designer, Translator, Rich Text Editors (such as Expanded Editors), Duplicated and Imported surveys and the Report Options screen.



The warning message shown when untrusted code was detected in a user’s input (Question Text & Translator)

## Campaign Permissions

New “Campaign Creation” area within Create/Edit Role with permission bits for each campaign type; Survey Link, Email/Contact List, Passcode, Panelist, Social Media, Offline Device and QR Code

These permission bits control which of the aforementioned campaign types are available on the “Choose How to Distribute Your Survey” screen and in the ‘Add Campaign’ dropdown on the distribution “Overview” screen.

These new permissions allow administrators to create simplified roles for EFM users with simple requirements for the application. It allows restricting access to campaign types that have the potential to send invitations to large distributions such as Panelist and Email List, for those users who are new to the application or simply don't need that capability.

The screenshot displays the "Choose How to Collect Your Survey Results" interface. It features four main options, each with an icon, a button, and a detailed description of participation and next steps:

- Generate Link:** Open Participation. Anyone who clicks this link can take the survey. Next steps: Add a link to the survey to a Web page, popup window, or an email.
- Create a List:** Selective Participation. Customize participation to a selected list of participants. Next steps: Use "Invitations and Reminders" to send an invitation to each participant.
- Require a Passcode:** Closed Participation. Participants are required to enter passcodes before starting the survey. Next steps: Send email invitations with passcodes or include them on...
- Invite Panelists:** Selective Participation. Select participants from your Panel. Next steps: Use "Invitations and Reminders" to upload a list and send an invitation to the selected panelists.

An inset window titled "Campaign Creation" shows a list of campaign types with checkboxes:

- Survey Link
- Passcode
- Social Media
- QR Code
- Contact List
- Panelist
- Offline Device

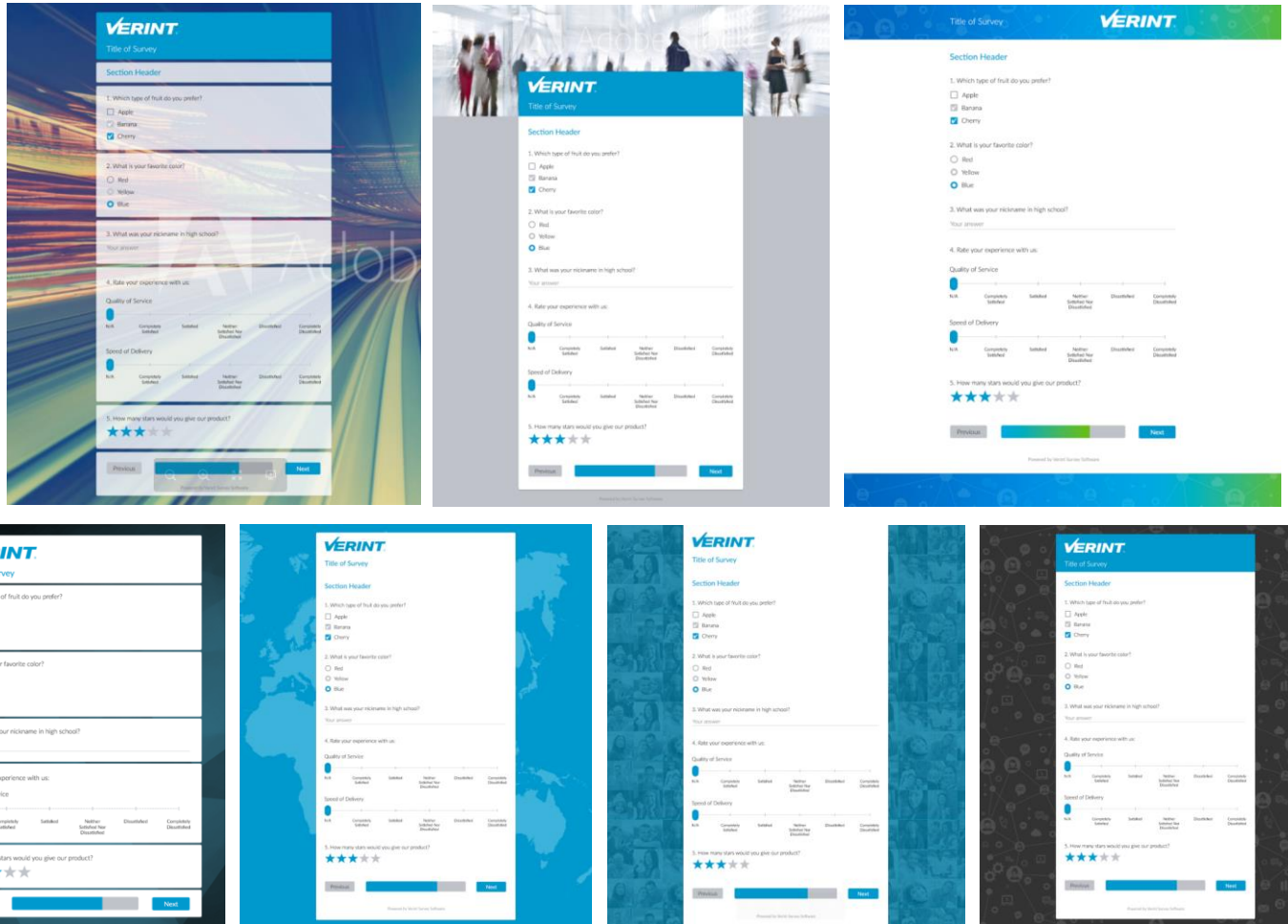
Example of what an author with only the “Survey Link” Campaign Creation permission will see on the “Choose How to Collect Your Survey Results” screen



## New Survey Themes

A selection of modern, professional, mobile-optimized Survey Theme templates which can be easily customized to best represent your brand. EFM 15.2 comes with 7 new themes, arranged into a new “Featured” theme category. The ‘Modern’ category has been renamed ‘Standard’ and the ‘Classic’ category has been renamed ‘Legacy’ – going forward the ‘Featured’ category will contain our most modern and up to date survey themes.

Some of these themes such as Vector and Global utilize a transparent background image, allowing you to change the page background color but keep the image



7 new Featured themes available in EFM 15.2 FP1

## Other Enhancements

In addition to the features already mentioned, EFM 15.2 FP1 includes lots of other notable enhancements, short description of which can be found below:

- API Support for SMS Invitations in the Contact List Campaign
- A new “Share Dashboard” permission bit for controlling who can share dashboards
- Scheduled exports of reports and responses now halt automatically when a survey is closed
- A new tooltip when hovering over themes in the list of survey themes, allowing you to see what the theme looks like without having to select it
- Improvements to the pie chart on the Collect screen, with the ability to view all status’s underneath the pie chart and print or email the view
- Improvements to the Campaign Statistics report element so that it accurately shows all status’s regardless of the filter that is set on the dashboard.

## System Requirements

### Servers (premise deployments)

Supported Server Operating Systems:

- Windows 2012 R2 x64
- Windows 2016 (non-R2)
- Windows 2016

Supported Database:

- MS SQL Server 2012 SP3
- MS SQL Server 2014 SP2
- MS SQL Server 2016 SP1

Support for Windows Authentication and MS SQL username/password Authentication

- Oracle 12c R2

Oracle is not supported for installations with Feedback Intelligence

### Browser for Survey Participants

Supported:

- IE 8+
- Edge
- Firefox (Current and Prior Version)
- Safari (Current and Prior Version)
- Opera (Current and Prior Version)
- Chrome (Current and Prior Version)

### Browsers for EFM Users

Supported:

- IE 10+
- Firefox (Current)
- Safari (Current)
- Chrome (Current)
- Edge

## Feedback Intelligence Users

Users of the optional Feedback Intelligence Add-on may access features of SAP's Business Objects 4.2 and require a browser meeting Business Objects requirements. Browser requirements are summarized here, for full details consult the [Business Objects 4.2 Supported Platforms \(PAM\) guide](#).

Supported Browsers:

- IE 10 + (32 bit only, restrictions on the desktop OS apply to each browser)
- Safari 7 SP03 (64 bit)
- Chrome (32 bit only)

Java: A Java Runtime Engine is required. Oracle JRE 7 and 8 are supported.

Users of the optional Feedback Intelligence Add-on may access features of Tableau Server and require a browser meeting Tableau Server requirements. Browser requirements are summarized here, for full details consult the Tableau Server Technical Specifications page.

Supported Browsers:

- Chrome on Windows, Mac, and Android 4.4 or later
- Apple Safari on Mac and iOS 8.x or later
- Internet Explorer 11 or newer
- Mozilla Firefox 3.x or later on Windows and Mac

## No longer supported

- Internet Explorer 10
- Windows Server 2008
- SQL Server 2008

## Resolved Issues

Area of Application	Description of Issue
Validate Records	A number of issues in Validate Records, including where data was deleted unexpectedly for hidden questions on hidden pages and in cases of block branching. These scenarios have now been accounted for and data loss should not occur
Passcode Survey	Addressed an issue where importing just passcodes into a passcode survey wasn't working.
Recycle Bin	Improved the performance of the task that deletes surveys that were in the recycle bin after a set period of time, which was previously resulting in a backlog of projects to be deleted for some customers
Accessibility	Addressed issues with the <Legend> tag and screen readers that was causing the question text to be read out twice.
Accessibility	Addressed an issue where the progress bar was not able to be accessed via tab order
Glossary	Addressed some issues where tooltips were not displaying in some cases such as when the keyword appeared in a table and when the keyword contained a special character
Triggers	Addressed an issue where trigger emails were not occurring when a case trigger contained piping in the custom properties
Reporting	Text analytic chart elements weren't displaying when filtering with an expression of "Contains", this is now working as expected
Blocks	Addressed an issue where "Resume Survey from Last Page" option was not resuming the survey to the correct page when block randomization was used
Import Participants	Addressed an issue where preload data was not imported when "Only import participants last invited" was used

## Known Issues

Area of Application	Description of Issue
Preload Data	A number of customers are seeing a small number of occurrences where preload data is not being shown in the responses grid despite being present and visible in the participants grid. This is something we aim to investigate next release.
Responses	Email and Mobile Number columns aren't being added when a Contact List campaign is added in the case where the user already viewed the Responses grid prior to adding that campaign.
Overview Side-tab	Conditional Preselection is not available for questions on 1st page