Product Description

Enghouse Trio 9.3

Document Information

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Owner	Amanda Pearson
Author	Amanda Pearson/Anna Lundkvist
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1 About Trio Product Description

This document describes the benefits of the Trio solution and each module. This document is a guide to customer benefits, product functions, licensing model, solution design of the entire system and each module contained in the system.

- What is Trio Product Description?
  - Describes customer benefits
  - Explains licensing structure of each module
  - Contains a detailed product and functionality description
  - Structured as the price list, for easy navigation
  - Describes the solution design
- What is the use of Trio Product Description??
  - Used for answering bids and writing offers
  - Used for describing product and functions when writing offers - “copy + paste”
  - Ensures customer satisfaction, by describing the product in such a way that the customers recognizes that the functions offered are the same as the functions delivered.
- Who is the white paper for?
  - Sales staff
  - Pre-sales
  - Enghouse Interactive and Partners
- Revision frequency of Trio Product Description?
  - Updated once a month (as needed)
- Availability of the white paper
  - Published on Enghouse Interactive file server
  - Published on Enghouse Interactive partner area
- Language
  - English, Swedish, Norwegian, Danish
  - Contact your local Enghouse Interactive sales office to find out if there is a local translation.

Additional documentation to support the sales process

- Technical Requirement
  - Available on the partner area
  - English only

The Product Description Trio 9.3 is a managed document. For identification of amendments, each page contains a release number and a page number. Changes will be issued only as a complete replacement document. Recipients should remove superseded versions from circulation. Please submit all requests for changes to the owner/author of this document.

2 Enghouse Trio 9

Enghouse Trio is an all in one communication solution, for medium to large organisations. Enghouse Trio product portfolio consists of three main product suites

- Trio Customer Interaction products
- Trio User products
- Trio Services products

The Enghouse Trio solution is the first product on the market to deliver these product suites in one integrated package, enabling customers to integrate and utilise internal resources in the best possible way, in order to deliver excellent customer service.

2.1 Connecting people and information

Today's businesses change quickly and there is a need to be agile and adapt to the ever-changing requirements of customers. In today's extremely competitive environment, it is too costly to have customer calls connected to the wrong people within the company. Employees have to be able to work together productively, wherever located, physically or within the organisation. The constant flow of phone calls, e-mails, Social Media and voice mails need to be managed, prioritised and connected to the right people, at the right time - every time.
This is why Enghouse Interactive has created Enghouse Trio, which is the result of decades of innovation in enterprise telephony and communications. Enghouse Trio combines enterprise-class communication technologies into a single unified communications platform that works seamlessly with major existing PBX, CRM, ERP, Social Media, e-mail and back office systems. Enghouse Trio coordinates all business communications, so that employees can focus on what they do best.

2.2 The Business Benefits of Enghouse Trio

- Optimises the Use of Business Resources
- Reduces staff cost
- Increases productivity
- Increases customer loyalty
- Connects all communications to the right contact point, at the right time, based on existing company business rules
- No dropped calls, lost e-mails or Social media posts.

Improves Productivity and Efficiency

- Provides full awareness of each resource's status, task queue, skills, role, and availability to the entire organisation.
- Provides streamlined communication processes that can adapt in real-time.

Virtualises Your Business

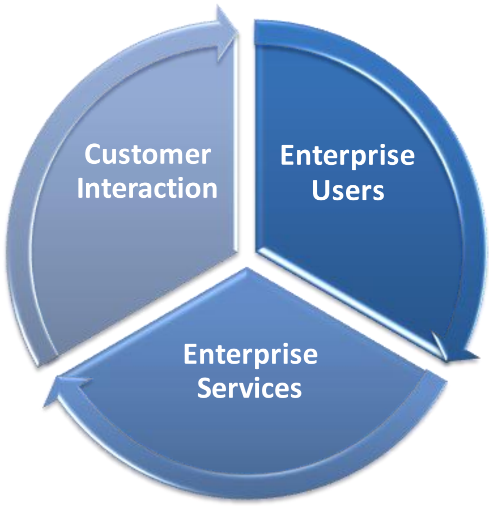
- Increases resource utilisation, by pooling resources across the entire enterprise around the globe. No matter where they are located geographically.

Unified Communications Management

- Reduced infrastructure maintenance
- Lower prioritisation costs
    - By having a single unified communications platform that handles all business-critical communications.

2.3 Enghouse Trio Core Business areas

Enghouse Trio consists of the following, seamlessly integrated, product suites:



2.3.1 Customer Interaction

This is Industry-leading customer service technology that coordinates all of your self-service and manual communication processes. The product suite offers a wide range of different options to ensure that an enterprise can create and design their own unique solution that meets their needs.
Features:

- Premium Contact Center Features: IVR, complex scripting, call blending, inbound call management, prioritisation, mobile handover, and distributed site management. All in one single, scalable platform.
- Centralized universal queue: manages all the different tasks such as calls,video, e-mail, social media,fax, SMS, tasks, call-back, chat, web call-back, telemarketing in one centralized module
- Smart Features: “Call me back” ensures that callers don’t need to wait
- Call blending: of inbound and outbound communications. Maximizes the value of your available resources during peak demand.
- Communications workflow engine: automatically assigns communications, to resource task queues, based on defined business rules. Automatically routes e-mails and faxes based on designated key words and business identifiers.
- Virtual Office: Ensures unlimited access to the company telephony system, from any phone, anywhere.

- IVR: Advanced possibilities for setting up call distribution and queue rules. TE can offer automatic services in the queue, combining IVR, text to speech, or speech recognition. Enables trained technical personnel to set up self service applications and advanced call routing scenarios based on DTMF or voice input.

- Visit Management: is an extensive and professional system for visitor handling, which automates the processing and registration of on-site visitors. Furthermore, the system can coordinate the handling of visitors with your other communications tasks.

- Auto Attendant: Enables the caller to get automatic attendant and referral functionality, by voice commands.

2.3.2 Trio Users

Enghouse Trio user products are the result of over 20 years of dedicated focus in creating the best user experience. The products range from simple clients to manage presence and communication profile management to advanced clients for Agents and Attendants where all incoming business communications are managed from one single user-friendly, Windows-based client a web based agent.
Features:

- Enterprise Attendants and Agents: Communications are assigned and prioritised, based on resource status and availability. This ensures a streamlined workflow and high productivity.

- Remote work support: Possibility for both agents and attendants to work from any device, both mobile and fixed.

- Unified Desktop: High productivity with Trio's user-friendly Windows-based or Web based client. Integrated toolbar to manage the prioritisation and completion of all incoming communications.

- Profile Management: All resources can change their profiles, skills, current services, communication methods and other criteria, to update company communications processes automatically.

2.3.3 Enterprise Services

Enterprise Services are the core product suite that enables Enterprises to experience full services integration. By selecting and composing the preferred options the Enterprise can create their unique solution that meets their specific requirements and ensures the best possible customer experience

Features:

- Enterprise Directory: Enghouse Trio provides functionality that extends your business communication environment beyond the confines of your enterprise

- Presence management: Resource availability based on information from calendar servers, web clients or third-party presence products. Information can be retrieved from both mobile and fixed devices. The feature that makes it possible to allow coordination of tasks, based on resource availability and schedule

- Integration with ERP/CRM system: Provides real-time business intelligence and automation, to increase productivity. Provides the benefits of CTI without the difficulty associated with integrating your back-office systems with your PBX. Extensive integration towards Microsoft Dynamics

- High-level and detailed reporting: allows auditing of communications history, statistics, and call recordings. Identifies communications issues/gaps by status code, business service, customer id, or resource. Identifies process and resource issues, to quickly improve efficiency.

- System Configurations: Multiple options for how the system can be configured are presented in a range from system scaling options to enterprise cooperation.

3 Enterprise Services

3.1 Enterprise Server Licenses

3.1.1 Enterprise Core Server License TRIO-P001210

3.1.1.1 Customer benefits

Enterprise Server is the basis for all applications, and it is the common server license. The base of the Enterprise Server is a highly advanced distribution and queuing engine for a number of different cases like: phone calls for attendants and customer service, e-mails, tasks, Twitter, Facebook etc. More details can be found below, under “Description of Trio Engine”
The Enterprise Server contains:

- Server application
- Database, the database engine is bundled in the server license
- Queue time and position in queue
- Enterprise Administration Manager License (Trio Administrator client)
    - Add, edit or delete customer records in the Enterprise Directory
    - Basic functionality: Administrate queue messages, scheduling for work hours, competence, agent (create, edit and delete), skill settings, role definition, prioritising of queues, and setting up of groups
- Enterprise Statistics
- Eniro and 118 connection

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3.1.1.2 How is it licensed?

- One license per Enterprise Server is needed.
    - If several Call Centers are needed in the same solution, use Additional Call Center Server License (Art.No. P004150)
    - If several Line Interfaces are needed in the same solution, additional Enterprise Line Server Licenses servers handling the calls are deployed. (TRIO-P001115)

Requirements if the Enghouse Trio system will handle calls:

- Enterprise Line Server License (TRIO-P0001115)
- Enterprise Line license/Call Quing License (TRIO-P004100)

3.1.1.3 Description of the Enterprise Server License

The base of the Enterprise Server is a highly advanced distribution and queuing engine for a number of different *cases*, a so called multi-channel Contact Center. It also generates statistics for all supported *case types*. The Enterprise server also contains a corporate directory database with detailed information about the company employees and their current presence status.

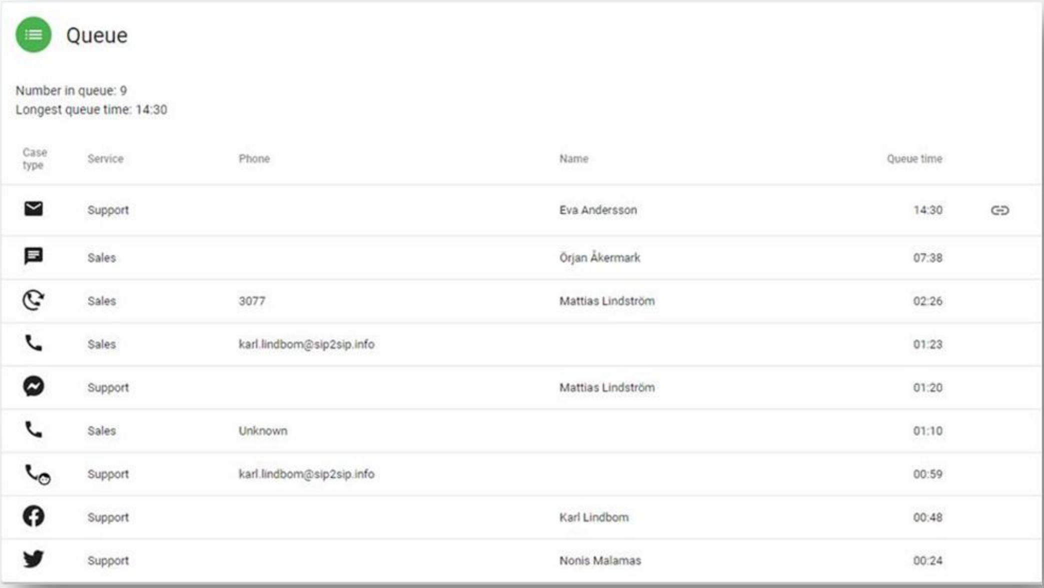
Distribution of cases

Cases
The case types currently supported are:

- Incoming phone calls to customer service
- Incoming phone calls to the switchboard
- Incoming phone calls to each agent’s personal queue
- Simple tasks, whatever kind a work task that you can think of.
- Outbound spontaneous calls

Also supported, but requires extra modules/licenses:

- Outbound call back calls (initiated from a customer’s phone call)
- Outbound call back calls (initiated from a “call me” button on a web page)
- Outbound telemarketing campaigns (initiated from call lists inserted into the system)
- E-mail messages
- SMS messages
- Voice mail messages
- Advanced tasks
- Call back tasks
- Chat (Trio Chat, Web Communication and eDialog24)
- Visitors
- Skype for Business chat cases
- Twitter cases
- Facebook cases
- Video cases



Queuevuiew in Trio Agent Web

The case types used in an installed solution depend on the specific needs of the organisation.

Services

In the Enterprise Server License there is actually only one universal queue. The cases are instead separated into different *services*, like “E-mail Advertising private”, “E-mail Advertising corporate”, ”Phone calls advertising private”, ”Phone calls advertising corporate”, etc.

There are a vast number of parameters that control to which service each case is routed. Here are some examples:

- The called phone number/redirecting number
- The called destination
- The caller’s phone number
- The E-Mail address
- Information from for example a website using the CC API, chat or web callback
- Based on selection in an IVR-menu
- For identified customers, information can be fetched from an external customer database und used to route to a specific service (based on the customers VIP-status, geographical location or whatever information is preferred). A customer can be identified in a number of different ways, like:
    - The caller’s phone number
    - A customer ID number entered in an IVR menu
    - A customer ID number entered on a web page (for web call back or chat)
    - A customer ID found in the body of an e-mail message
    - A customer ID entered in a task (if it is related to a specific customer).

- The called number for a fax message (customization if using NMS card)
- Keywords found in the subject or body of an e-mail message
- The subject selected for a chat conversation
- The content of a Facebook or Twitter post
- Etc.

See more information below ”Case routing in Enghouse Trio”

A maximum of 1000 services can be set up for each Contact Center.

Priority classes

Each service receives an individual priority class. The cases belonging to that service receives the priority class (unless an individual priority is set for each case – but this is only in rare cases when one needs an individual priority for each customer). Each priority class consists of two parameters, *absolute priority* and *queue time points*.

A case with higher *absolute priority* will be distributed before a case with lower *absolute priority*.

For cases with the same *absolute priority*, the *queue time point's* parameter is used as a multiplier of the waiting time for the case.

- A case with the parameter set to 1, will receive one point per second.
- A case with the parameter set to 2, will receive two points per second.
- It takes ten seconds for the first case to receive the score ten points.
- It only takes five seconds for the second case to receive the same score
- The second case will, on average, only have to wait half as long as the first case

The cases are presented to the agent on a list according to these priorities (see the cases section above for a picture). The *queue time point* parameter may cause a case to move up on the list as the waiting time increases.

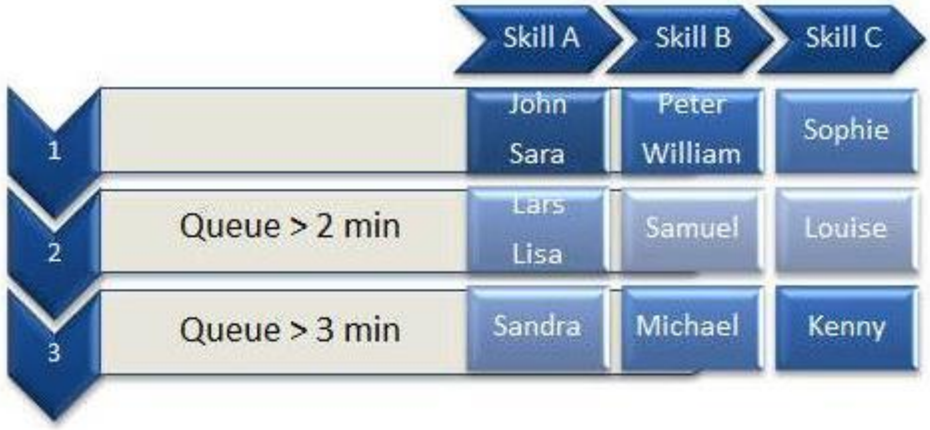
Skill based routing and overflows

The distribution engine uses skill based routing to control which agent or attendants should receive cases from each service. The skill based routing feature uses two parameters for the routing: *Service Order* and *Skill.*

These parameters are most easily explained with an example:

For the service “Switchboard External” the follow agents have currently these Service Orders/Skills:

1A – Sara and John
1B – Peter and William
1C – Sophie
2A – Lars and Lisa
2B – Samuel
2C - Louise
3A – Sandra
3B – Michael
3C – Kenny



1. Cases are first distributed to (1A) Sara and John. The one with the longest idle time gets the next call.
2. When all persons in 1A are busy, cases are distributed to (1B) Peter and William (according to longest idle time)
3. Then same procedure for (1C) Sophie.
4. When all persons in Service Order 1 are busy there will be a queue.
5. When a case has been waiting longer than a set threshold value, in this case 2 minutes, the group of agents will be expanded to also include all agents in service order 2.
6. The same procedure applies for 2A, 2B and 2C as for 1A, 1B and 1C.
7. If needed a third Service Order may be included
8. When the waiting time is shortened, the extra agents will still be included for a configurable time (default 5 minutes). This is to prevent the extra agents to be included and excluded too often, since this interrupts their ordinary duties.

Note that if there are no agents with Service Order 1 logged on, then agents with Service Order 2 will be contacted directly, without waiting for the threshold waiting time.
There is no need for the supervisor to add or remove agents manually, as the traffic situation changes. The system automatically regulates the number of connected agents, depending on the workload and the service level goals set up by the company.
The system can also handle traditional overflow from one service to another, but the Service Order feature is a much better option:

- The ordinary agents are still available for cases as soon as one becomes idle
- There is no change in service parameters, queue messages, etc.
- The statistics will be much clearer

The way to configure Skills and Service Order is the same for all types of cases.
The agents servicing level 2A will not be presented with the cases that still are on 1A level, this way the second line can work with other tasks without being presented will all the cases.
Roles

An Agent and Attendant can of course have Service Order/Skills for many services at the same time. But it is also possible for an agent /Attendant to have different sets of skills at different times of the day. We have given these different Skill Sets the name *Roles*. The agent can select the Role to currently use in a drop down menu in the Enterprise Agent Client.

Distribution based on Contact History

The Enterprise Server can also distribute a case to a preferred agent/attendant based on contact history.

Example:

A customer has sent an e-mail to the company, and a few days' later e-mails in again to check what is happening with his case. The Enterprise Server can then distribute the e-mail to the same agent that handled the first e-mail. If the agent is not logged on, the e-mail will immediately be distributed according to the ordinary distribution rules (Skills and Service Order). If the agent is logged on but busy with another case, this e-mail can wait for a configurable time for this particular agent, before moving on according to the ordinary distribution rules.

If one uses the Enterprise Agent Client there is an icon with a green shirt person next to the case, indicating that this case currently has you as the preferred agent. The agent now has the option to pick or book that specific case, causing it not to move on according to the ordinary distribution rules.

3.1.1.3.1 Settings for each service

3.1.1.3.1.1 Opening schedules

The administrator can configure different opening schedules. Each schedule includes:

- Up to two open/closed times per day (to allow "closed for lunch", etc)
- Opening hours Monday to Friday
- Opening hours Saturdays
- Opening hours Sundays.
- One Individual Exception List

Several services may use individual opening schedules or use the same as other services.

Each service has an individual setting for a default message, to be played when the service is closed. They also have individual settings if an application should be used:

- connect the call to a supplied number
- receive a voice mail message
- register a call back request
- send to another service
- or a customized application

An Exception List contains exceptions to the opening hour listed above:

- Exceptions regarding a specific days of the week (close earlier on Wednesdays and Thursdays, etc)
- Exceptions regarding a specific date (not open at all on Christmas Eve, etc)
- Exceptions for a specific period, for example from 2020-11-01 to 2020-11-30

For each exception one can configure if a specific message should be played (E.g. Christmas greetings, with information that we do not open until ...). One can also run a specified application (same as the applications above). Several schedules may use individual exception lists, or share the same list as other schedules.

3.1.1.3.1.2 Unstaffed services

If a service is open but no agents are logged on, the user has the same possibilities as when a service is closed, regarding playing a message and/or running an application.
If a service becomes unstaffed, warnings can be sent to supervisors via e-mail or as an audio visual indication in the Enterprise Agent Client. When an agent or attendant tries to log off or change role the system will automatically warn the person if the service will become unstaffed.

3.1.1.3.1.3 Maximum allowed cases in queue

If a service sometimes gets really long waiting time, there is a possibility to refuse putting more cases in queue for that service. This can be useful for preventing too long waiting times or to prevent consuming too many line resources. The maximum conditions can be set as:

- Maximum cases in queue
- Maximum cases per agent currently logged in
- Maximum waiting time. If any case in this service has been waiting longer than this, new cases will be refused.

The two first conditions can be configured dynamically, to allow fewer cases when it is getting close to closing time. Mainly, this is useful for calls and chat conversations.
When the maximum limit is reached, there are the same possibilities as when a service is closed with regards to playing a message, and/or running an application.

3.1.1.3.1.4 Accepted calls

For accepted calls it is possible to configure one welcome message to use when agents are available, and another when there are no available agents.

3.1.1.3.2 Some other individual service settings

- Service level parameters
- Alarm parameters (waiting time, number of cases in queue, number of agents logged on) (Enterprise Agent Client only)
    - Alarms can be sent by e-mail and sms when the option e-mail to sms is available for example when using Trio E-mail to SMS Gateway.
- Customer information layout (what information about the customer should be displayed to the agent) (Enterprise Agent Client only)
- Preprocessing and post processing time.
- Returning call parameters (Enterprise Agent Client only)
- Recorder parameters
- Etc.

3.1.1.3.2.1 Phone calls waiting in queue

For phone calls waiting in queue there are a number of possibilities, all configurable individually per service.

- Music in queue
  Callers can get music played while in queue. You can have any music you like as your queue music. Configure different play lists, consisting of different tracks. For each service you can select which play list to use, and whether the order should be straight or random.

- Enterprise Queue time and position in queue

- Queue messages
  Configure up to three different queue messages, that each can be repeated a set number of times. When more messages are needed, IVR functions can be offered as customizations from Trio. Queue messages may also be conditioned, like “only offer call back if the expected waiting time is longer than x minutes”.

- Customer individual queue messages
  For instance, the system could display the balance of the customers’ account while he/she is waiting in queue. This is another customization offered by Trio.

- IVR and Call back (Art.No. P002140)
  The customer can be allowed to run a self service IVR while waiting in queue, and maybe listen to the latest transaction from his/her account. During this time the call is greyed out in the queue, so the agents know that the customer is using the IVR functions.

- The user may also get an option to register a call back request and, instead of waiting, let the company call when there is an agent available (Enterprise Agent Client only). The number of attempts to call the customer and time between attempts are configurable.

- It is possible to assign all call back received by the service to another service. The call back can then either keep the same position in queue as the original phone call or it can be configured to be moved to an alternative service with lower priority.

- Voice mail/Voice message (part of Mail License Art.No. P002110)
  the customer may be given an option to leave a voice mail message, instead of waiting in queue. The agents (Enterprise Agent Client only) may then handle the case when the workload is lower.

    1. Note that this is not the same as Enterprise Voice (Included in Enterprise User License Art.No. P021210) since the Voice message function in Contact Center is separated from Enterprise Voice.

    2. In a case where the user only wishes to forward the calls from a queue to a standard voicemail box, Enterprise Voice is NOT required.

3.1.1.3.3 Personal queue

In addition to the common services, each agent/attendant also has a Personal queue.
The agent’s direct number may be routed to the agent’s personal queue. This gives the agent full free-seating possibilities. The agent may log on from any phone: company, IP, mobile, home, etc. All calls for that agent (both private number and service calls) are distributed to the phone where the agent is currently logged in.
The personal queue gives similar possibilities as the common services, like:

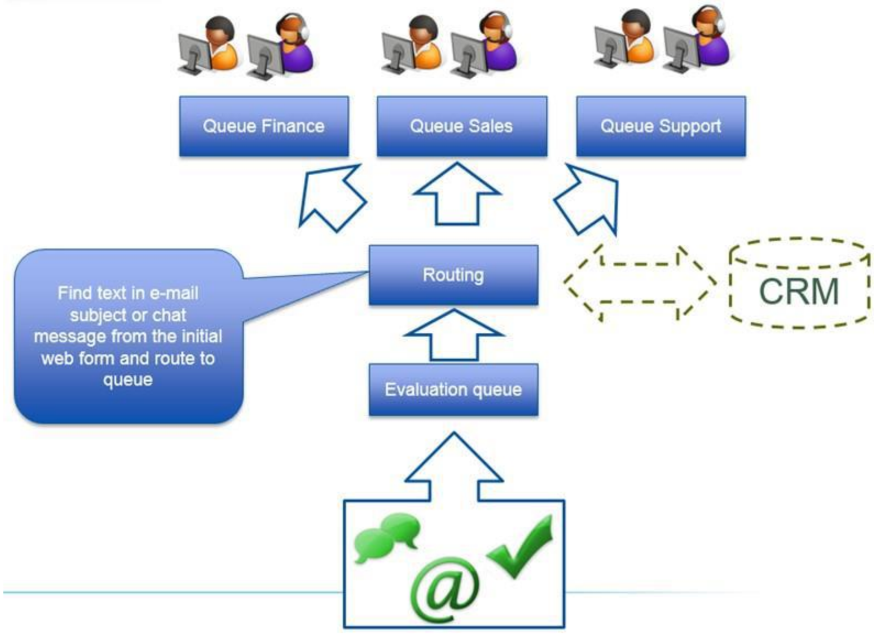
- Queue music

- Expected waiting time and position in queue

- Queue messages
- Call back
- Voice mail
- Message and/or application when closed
- Etc.

3.1.1.4 Case routing in Enghouse Trio

Enghouse Trio have had for a long time a powerful tool to route calls into different services. This tool is called Interaction Studio (Art.No. P023120) and has its own chapter in this document. Interaction Studio can route e-mails, chat, tasks, web callback, Facebook and Twitter as easily as calls. This way an e-mail, chat, task, Twitter case, Facebook case and web callback can be distributed to different queues for example based on contents of the message that is specified in the chat registration form or the text in the subject message of an e-mail or keywords in a Facebook posting.



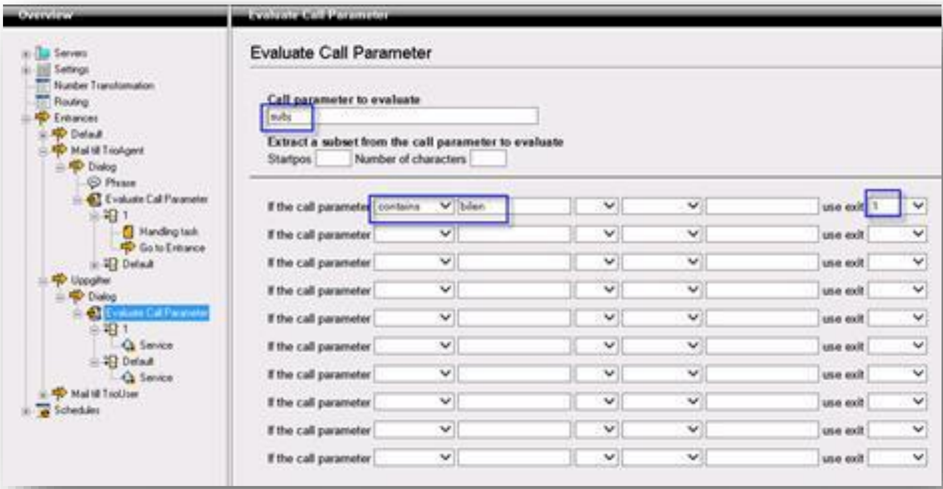
This will enable multiple channels to be handled the same way as for calls, opening up integrations with external CRM systems or similar.

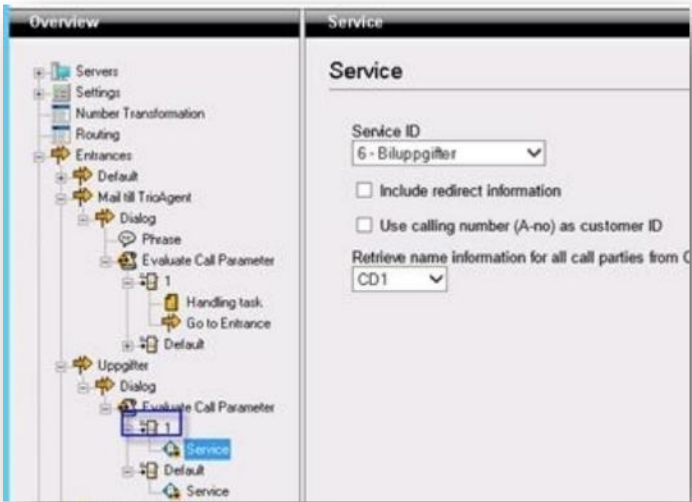
3.1.1.5 How does it work?

3.1.1.5.1 Mail

In the Contact Center administrator the e-mail addresses are added to an evaluation queue and these are managed using the Interaction Studio where e-mail addresses are routed to different entrances. Now all e-mails can be routed to the same service first and then in Interaction Studio separate those into different queues will get a better overview.

In the Interaction Studio entrance additional parameters can be added for evaluation, for example if the e-mail has certain text in the “subject” this will route the case to a certain queue where suitable agents are working. The subject or the first 1000 characters in the body can be monitored.
Example: If the subject contains the word “bilen” (car) the case will be sent to service six – biluppgifter.
Note: this is a “kind of” keyword search but it is not as sophisticated as the one where you can look for words in a body that is for example a 3 figure number after a :-sign. This kind of keyword search is done by the Professional Service department.





3.1.1.5.2 Chat

Enterprise Trio Web Chat is initialized by executing a post request described in the installation manual where practical examples are available.

The parameters could be done either by a hidden form with preselected values, or a form that the users fill out before entering the chat. Parameters provided to Enghouse Trio by the web chat form can be used to route cases to different Enghouse Trio services.

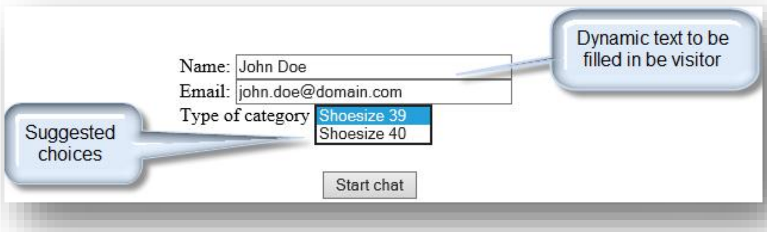
Some parameters are used by the chat session while others are saved in the database for later review in statistics. For example a customer ID can be filled in automatically for logged in users or the customer types in some text to initiate the chat and that text can be analyzed and used for routing to specific queues based on its contents.

All custom parameters should be defined in the Enghouse Trio system (Trio Admin CC / Call Parameters).

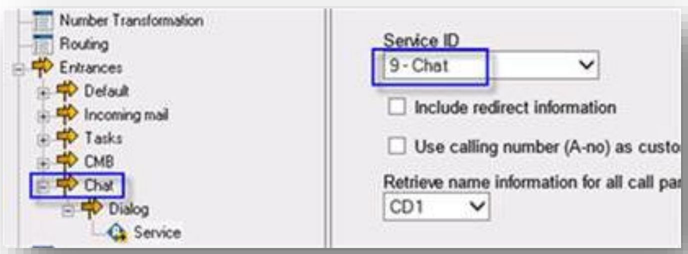
3.1.1.5.2.1 Example of a webpage

In this example we combine hidden values and dynamic fields in a form to transfer the parameters to the Enghouse Trio queue when the user clicks *Start chat*.

We ask the customer to fill in their name and e-mail address and select shoe size. The name can be displayed to the agent and the e-mail might be useful to pop an external CRM system. The chat will first end up in service 9 (evaluation service) and thereafter be routed depending on the filled in and chosen text.



In the Interaction Studio
When the chat request enters the Enghouse Trio system it will be evaluated in Interaction Studio.

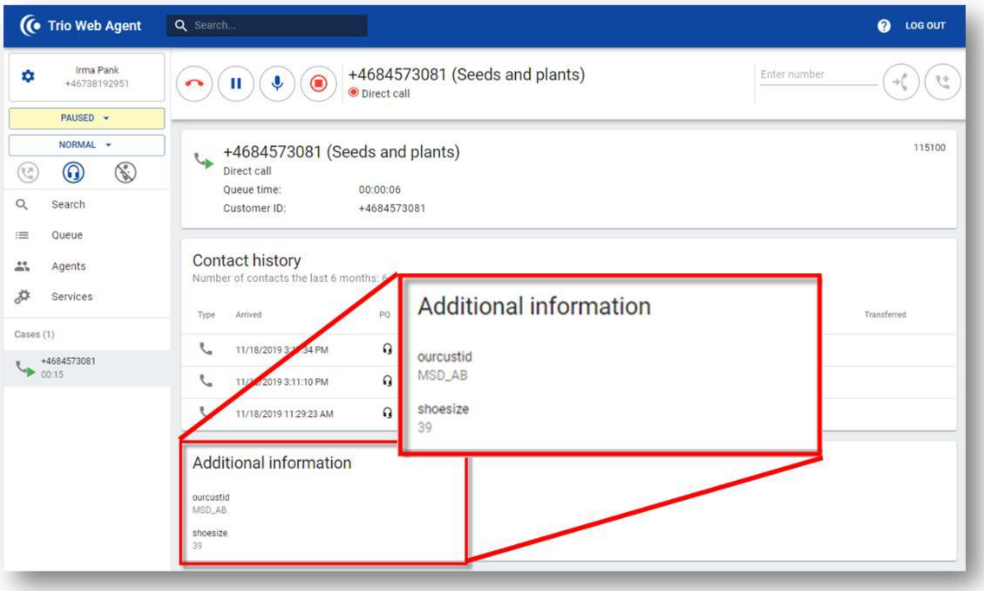


So, for this example the chat case will end up in the service “Chat”.

- d.name = John Doe
- maddr = john.doe@domain.com
- FormData = c.ourcustid=A123;d.shoesize=39;
  These parameters have also been defined in the CC Admin’s Call parameters tab.

By sending the test form a chat case will be placed in the queue with the provided parameters set.

In this case we have created a new layout to show the custom parameters in the Trio Agent client.



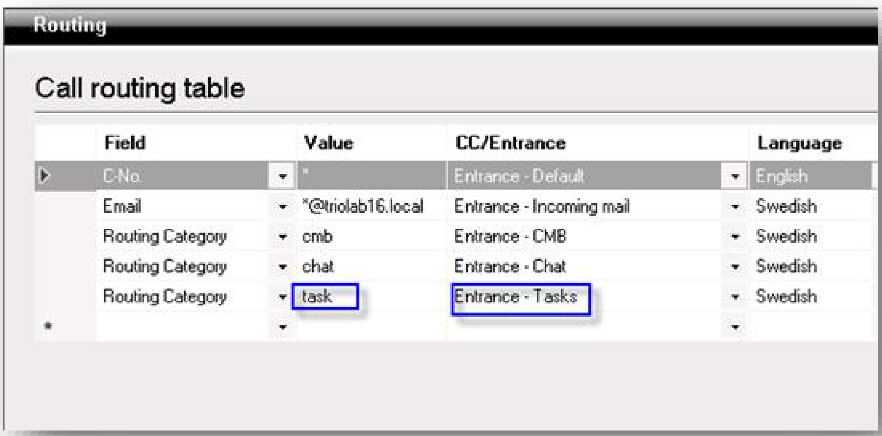
3.1.1.5.3 Facebook and Twitter

The 140 first characters in the post can be monitored and sent to different services. See the section about Mail to understand the configuration of keywords with Evaluate Call parameters functionality in Interaction Studio.

3.1.1.5.4 Task

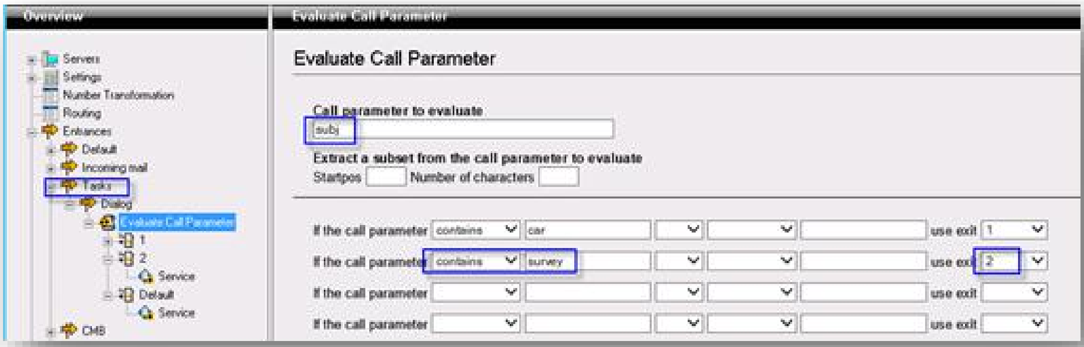
The Contact Center API is a REST API provides functionalities to third party applications in order to create and delete tasks in the Enghouse Trio System. See section below about the Enterprise Contact Center API Server.

In the example code below we will route on the value “task” in Interaction Studio.



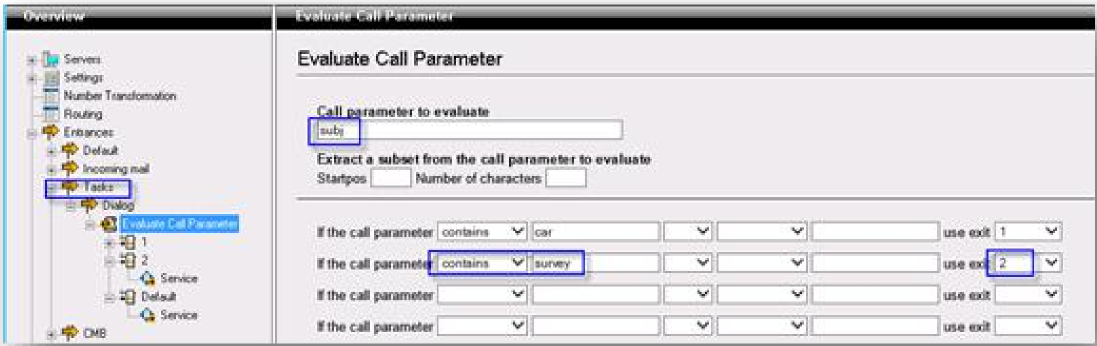
Using RouteCategory to route a task to an entrance

Then, in the entrance, we will evaluate the *Header* parameter in the *TaskDefinition* and depending on the outcome route the task to different services.



The Evaluate Call Parameter will look for the word "survey" in the subj parameter (Header)

If the word "survey" was found in the subj parameter the task will be placed in queue for the Survey service.

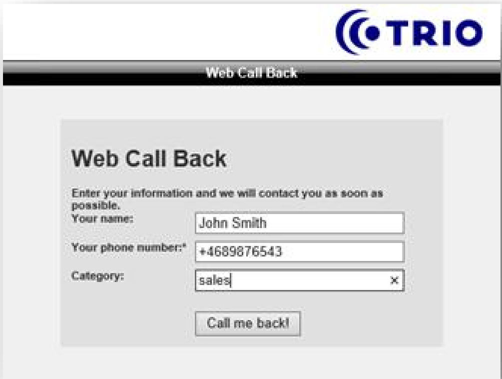


3.1.1.5.5 Web callback

In order to utilize the case routing function for Web Call Back cases, several settings must be done in the Enghouse Trio system.

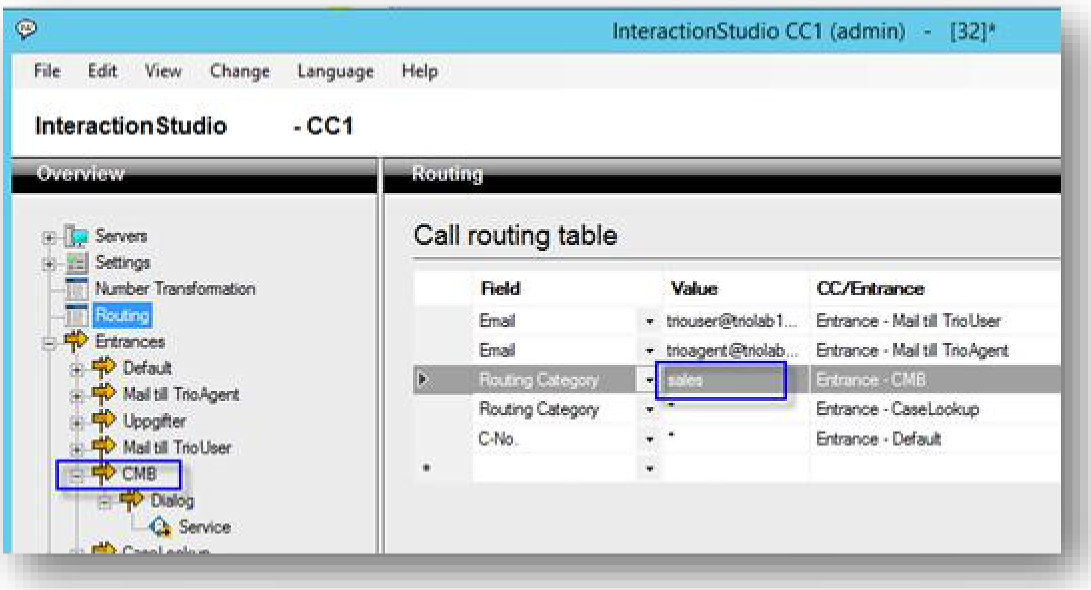
3.1.1.5.5.1 Web Call Back Form

Results in the following web form.



By selecting the field *Routing Category* in the Interaction Studio's Routing table, you will be able to enter a routing category value. If this value is the same that was entered in the Web Call Back form ('RoutingCategory' in the example above) the case will be routed according to the settings in Interaction Studio.

In the example below, all cases with the attribute set to 'sales' will be routed to the CMB entrance.



3.1.1.6 Additional value

With this possibility to route other cases than call cases in the Interaction Studio the integrations with external CRM systems or similar will be possible for both chat, e-mail, task, Twitter and Facebook cases and web callbacks. The additional information that is available in text is now reachable for integrations such as where the customer ID was specified in the IVR using DTMF.
This way the integration can use additional data to lookup relevant information for example within a CRM system before any agent is assigned.
The cases can be prioritized based on the VIP customer regardless of if they are calling, sending e-mail or starting a chat.

3.1.1.7 Requirement

- Interaction Studio (TRIO-P023120)
- Enterprise Mail Server License (TRIO-P002110)
- Enterprise Social Media Server License (TRIO-P002115)
- Enterprise Trio Web Chat Server License (TRIO-P002130)
- Enterprise Contact Center API Server (Art.No. P002210)
- Enterprise Callback Server License (TRIO-P002140)
- Enterprise Agent/Attendant Client (Art.No. P011210)
- Enterprise Agent Contact Center license/Multi Media Client (Art.No. P012210) for each agent that simultaneously handles E-Mails, tasks, chats and web callback additional case types.

3.1.2 Enterprise Queue time and position in queue (Included in Enterprise Core Server)

3.1.2.1 Customer benefits

This is a voice service that informs the caller about estimated wait time and/or the caller's place in the queue. This is used as information to the caller and to extend the time the caller is willing to wait. Time and position in queue can also be used together with the callback option (requires Art.No. P002140 Call Back Server License). Evaluating the information about the position in queue or the wait time, the caller can decide whether he wants to wait in the queue or request a callback.

- Number in queue message
  A message is played informing the customer about the current position in the queue. The position played can either be for the individual service or a group of services. It is recommended that the message is configured to be repeated so that the customer can follow the progress in the queue.

- Expected waiting time queue message
  The caller will get the estimated wait-time message played when the call is placed in queue. This message is only played once and not repeated while waiting in queue. The time is calculated through a highly advanced simulation.
  It works like this:
  - The system knows which agents/attendants are currently logged on and their current skills.
  - The system also knows which case each agent currently is occupied with, and for how long.
  - The system continuously calculates the average time to handle a case, for each service.
  - The system also knows which cases are currently waiting in queue, and their priority class.

  Each time a new call is placed in queue a new simulation starts:

  1 Based on the average handling time, it calculates which agent is next to become available and after how many seconds that occurs.

  2 It then recalculates what the score (see the section about priorities) for each of the cases in queue would be when that agent becomes available.

  3 It now calculates which case would be delivered to that agent based on the skills settings.

  4 After that is starts all over again, until the next case to be delivered is the new call. This is how the expected waiting time is calculated.

A common way of calculating the expected waiting time is to use the average waiting time for the latest x calls. This method is simple, but not very good at handling variations in the load of incoming cases.

The simulation method based on average handling times is much better (but also much more complicated).

- The number of agents

The system will tell the customer how many agents are servicing the queue of the requested service. This calculation is not as "advanced" as the one above about waiting time. The customer has to keep in mind that an agent can serve many services.

3.1.2.2 How is it licensed?

License is included in Enterprise Server and per Additional Contact Center.

3.1.3 Enterprise Statistics

Enterprise statistics is a product developed for Enghouse Trio to replace the Excel reports. Users, Time, Cases and old Customer (now called Case Search) from the Excel statistics have now been cooperated into this web based interface. Also statistics from the original Webstatistics is incorporated in the new Enterprise Statistics. Enterprise Statistics offers historical statistics from the Trio database. The statistic is detailed and a very important tool in the work of analyzing and improving the customer service.

3.1.3.1 Customer benefits

Since the report tool is web based it is easy to access from any computer. The possibility to configure different access levels will improve the security where different organizations or departments are using the same Trio database and the customer wishes to hide certain data for some administrators. The access levels are set in the Trio Administrator program. To be able to schedule reports will give the users the possibility to reuse the information they have created, not having to remake the reports every time.

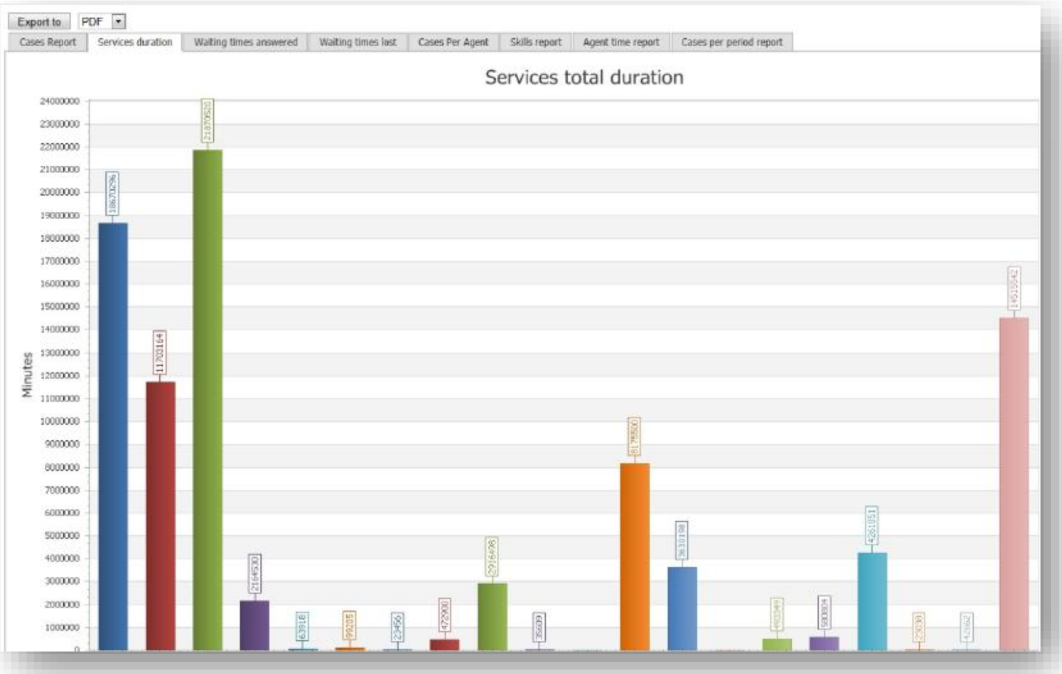
3.1.3.2 How does it work?

Enterprise Statistics is installed directly on the Enterprise Server. The web application requests the user to provide a valid username and password for the page to open. For each user one can configure what that user is allowed to see:

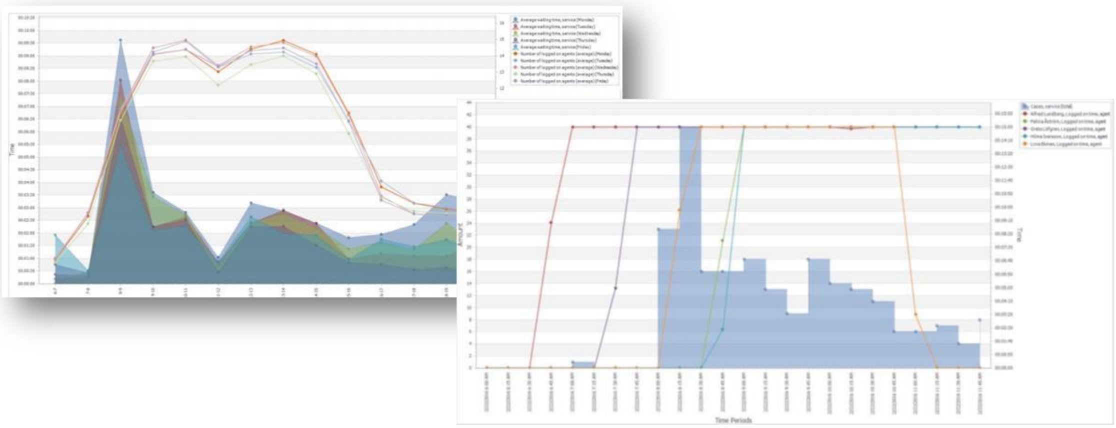
- No statistics
- Group statistics
- All statistics

This is configured in the Trio Administrator program.
Single Sign on is used when logging in (See section Single Sign on for more information)
The users can configure "favorite" reports that will be shown on the first page. Each report, user, case and time has its own sheet which means that switching between the different reports will be very easy. The Enterprise Statistics has functionality such as being able to choose several services in the same report. It is possible to use "drag and drop" in order to change the way the statistical data is presented. The pictures below are showing how the column "Service name" is dragged to change the presentation and the result.

Some sheets display graphs:



Comparison report:



The following reports exist:

- Comparison report
    - Gives the possibility to compare different dataseries.
- Case report
    - Describes incoming cases, and their result within the system.
- Time report
    - Gives information about agents and their availability during certain a period of time.
- User report

  - Gives agents and users statistics.
  - Statistics over transfers and redirects
- Postprocessing report
  - Gives statistics of the post processing reasons
- Tag report
  - Gives statistics on how the different tags are used in the system

IVR report

Gives information of how much the IVR choices are used.

- Customer Search
  - A search tool to find specific cases and get information about what has happened with the case.

3.1.3.3 Examples of how to make your statistics useful

3.1.3.3.1 Staff planning

Use existing statistics over a period of time to calculate your staff requirements.

3.1.3.3.2 Agent performance evaluation

You can see how much time each agent has spent in each role, how much time spent on lunch, in meetings, etc. You can also see how many cases from each service that each agent has handled and the amount of time spent on handling cases per service. One can also see if there are certain types of cases that the agent often transfers to other colleagues. This could indicate that the agent needs extra training in handling that specific type of case.

3.1.3.3.3 Review specific customer cases

It could be a useful feature, to be able to review a specific customer case, e.g. if the customer has complaints. In the Case Search all cases are shown in chronological order, over a chosen period of time. By right-clicking on a case you can view details about the case. Examples of details you can get are:

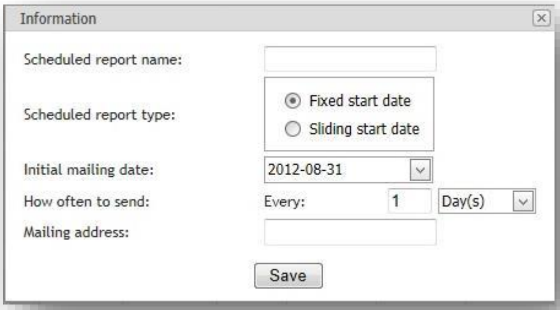
- If the customer has been connected between agents you can follow all connections and see how much time each agent used on this specific case.
- If the specific case is an e-mail, you have the possibility to read the e-mail and also see the agent’s reply, simply by clicking in the report.
- For a chat conversation you can see all messages of the conversation, and even view the web pages that the agent sent the url for.

3.1.3.3.4 Statistics from different services

You can, with just one search, get statistics from several services within the system. For instance, statistics will show the number of answered, lost and refused cases, case duration times, waiting times in queue and service level.

3.1.3.3.5 Scheduling reports

It is possible to schedule reports. A user can configure to have a report sent by E-mail every day, every week or every month. The report can either be a pdf file attached in the E-mail or a text file used to import into another program.



- The user will write a name for the report.
- The user will choose if the report starts from a fixed date every time or if the start date will slide.
- The user picks a start date
- The user decide how often the report will be delivered
- The user writes the e-mail address for the report to be delivered to. It can be multiple addresses.

It is also possible to export reports from the website as a pdf, excel and csv-file.

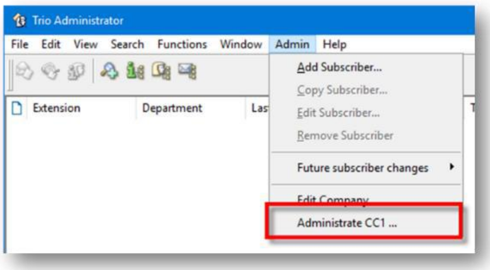
3.1.4 Enterprise Administration manager License (Trio Administrator CLIENT)

3.1.4.1 Customer benefits

To be able to have different access profiles for the different administrators will enhance the security when different organizations are sharing a Enghouse Trio system or in larger companies with several administrators responsible for different items in the database. The Trio Administration uses Single-sign-on.

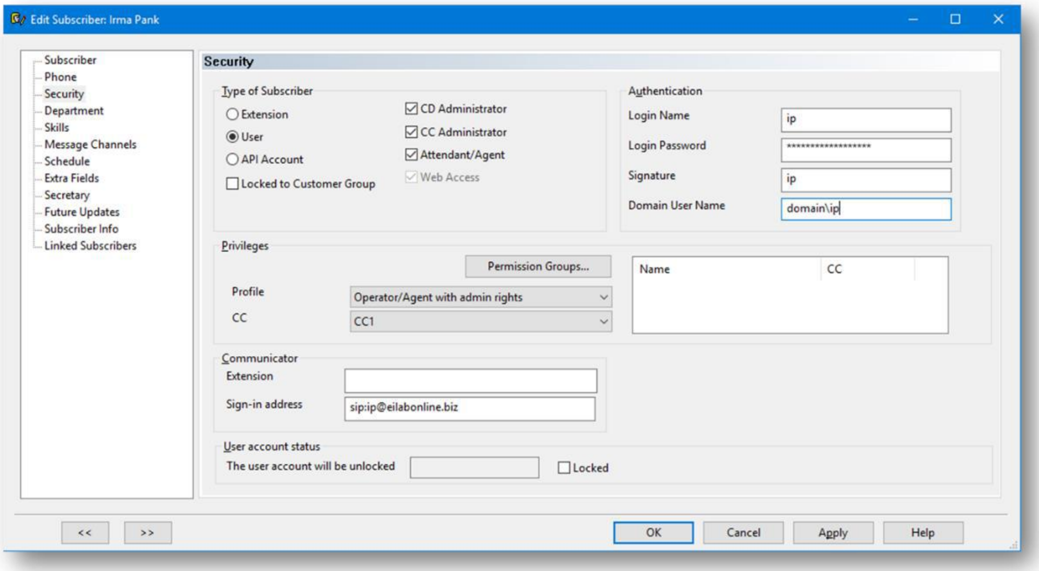
3.1.4.2 How does it work?

The Trio Administrator program is used to set up the company organisations, general company structure, create responsibility/skills table needed for the company, and to update the user directory. The administration for the agents, services etc are configured in the same program.



It is possible to configure access levels for the users and administrators. A person can be a user or an administrator in the program. A user can be a person having access to the web client or an operator who also is working as an administrator. An administrator has access to the administration tools for the company database and for the Contact Center. The administrator can be only a Company database administrator or a Contact Center administrator or both. A System administrator can define who is administrator or not.

The phrases that are played back in the IVR and Queue messages in CC-Admin are replicated to the Administrators PC. From the local replica the files are played back and can be chosen for different IVR functions. The access to the Enghouse Trio server is this way “limited”and is made more suitable for hosted deployments.

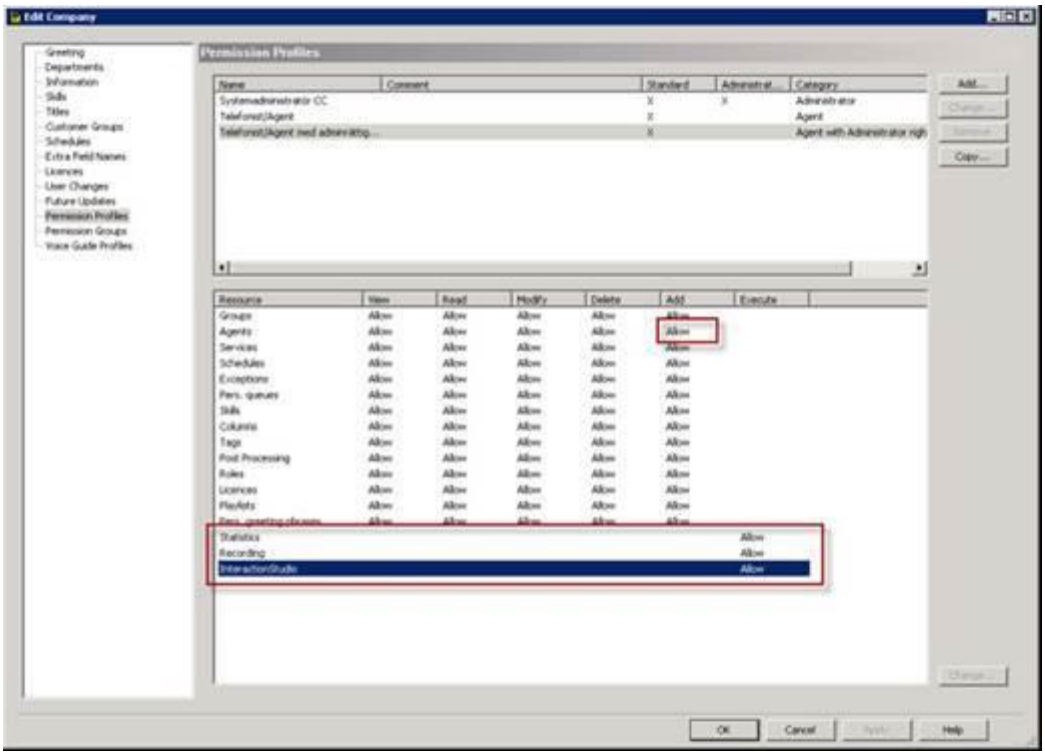


An administrator can be locked to Agents, Queues, Schedules, Exceptions, Personal queues, Skills, Columns, Tags, Post Process time, Roles, Licenses, Play lists, Personal greetings, Enterprise Statistics (including Webstatistics) and recording. An administrator can also have access only to groups of Services, agents, schedules, Exception lists, personal queues, skill lists, Tag lists, post processing lists, role lists, playlists and personal greeting phrases. The access level for Enterprise Statistics can be own (which is none in Enterprise statistics and own in Webstatistics), agent group or all. The same applies for Recording.
To lock a person to a resource is made by “profiles” that are configured by an administrator. The program will create three standard profiles. The profiles contain what kind of access the administrator will get and to which groups.

- View: if the item will be shown or not for the administrator
- Read: if the administrator can see details, i.e details for the different agents in the agent section.
- Modify: if the administrator will be able to perform changes.
- Delete: if the administrator will be able to remove objects, i.e delete a schedule.
- Add: if the administrator will be able to add new objects, i.e create a new exception.

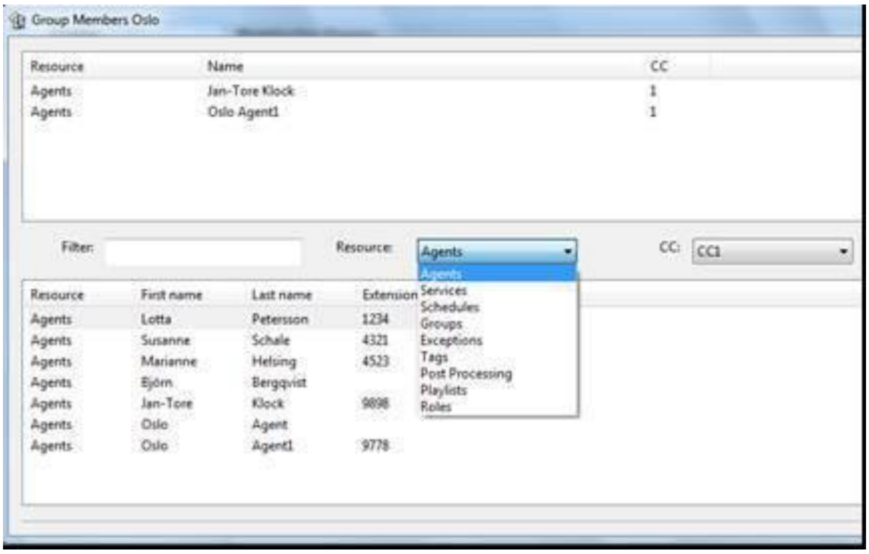
How to control the above rights:

- Deny: The administrator is not allowed to perform any operations on the objects, despite of any other rights such as from a group or globally.
- None: Generally the administrator is not allowed to perform any operations on the objects BUT it can be allowed for some agents, services or schedules by adding these as members of a group that belongs to the profile the administrator has.
- Allow: The administrator is allowed to perform operations on the objects. This can be denied for agents, services and schedules by adding these as members of a group that belongs to the profile the administrator has denied on.

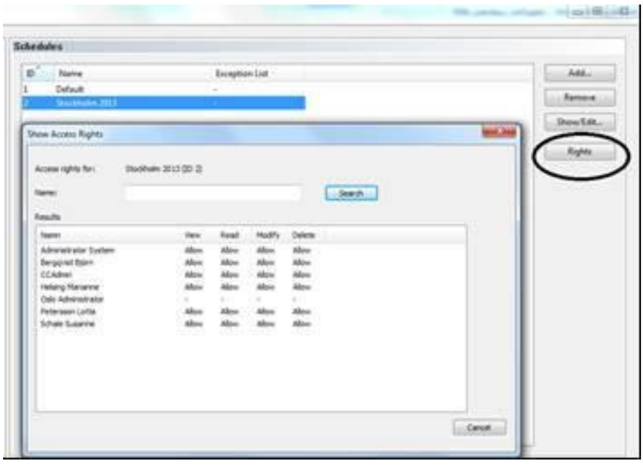


Groups can be made from Agents, Services , schedules, Exception lists, personal queues, skill lists, Tag lists, post processing lists, role lists, playlists and personal greeting phrases. A group can contain of all items. One item, i.e one agent, can be a member of several different groups.

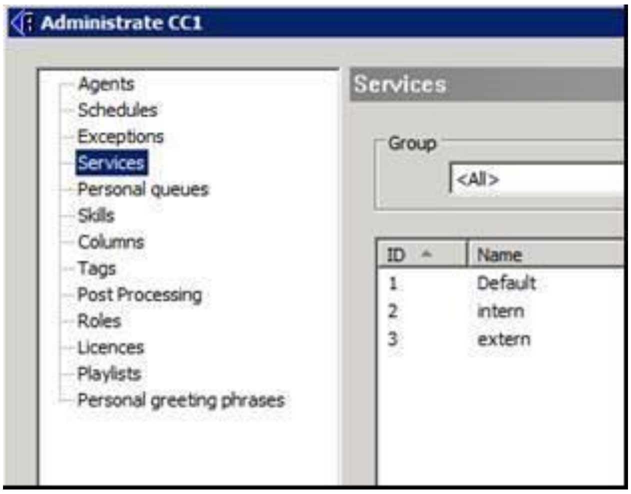
It is possible to give access to Interaction Studio for different Administrators by creating access profiles where one profile gives access to Interaction Studio and others do not.



When an administrator is creating an item and putting it in a group, it can sometimes be hard to remember which administrator has access to what group. There for there is a button called “rights”. Pressing that button will show all the administrators and if they will have access to the item just created.



It is possible for several administrators to work simultaneously in the administrator program. If an administrator is working on configuring a schedule and another administrator wants to work with the same schedule a warning will be shown that a conflict is about to happen. It will then be easy to contact that person. The administrator will only look the schedule he/she is working on, other administrators can work on different schedules or other posts in the database.
There are no access levels when it comes to administrate the Company database.
The Contact Center administration has the similar layout as the Company database administration.



It is possible to “lock” agents and assign services to the same customer groups as in the Company Directory. This will give the possible for the administrator to control what the agents will be able to see in their client program.
When installing on the Client PC there is a choice if the Trio Administrator will be installed separately to get access to the all the functionality or only together with the Agent/Attendant for access to user configuration and/or calendar view of the referrals.

3.1.4.3 Additional fields available for multi user changes

Additional fields are available when editing multiple users/subscribers, this will simplify the daily work for the Company Directory administrators.

Subscriber

On subscribers the administrator can edit First name, Last name, Name search, Phonetics, Card key, Customer group, Hide user option for all selected users.

Telephone

In the telephone dialogue the administrator can Mobile phone, Backup person, Voiceguide profile, Information and Attendant info for all selected users.

DepartmentThe administrator can set main department, Department priority, Title and location for all selected users.

Skills

It is easy to modify skills at once for several users., The administrator can see the number of used skills among the users selected, and can add and remove skills for all selected users in one move.

Extrafields

All extrafileds can be modified for all selected users at once.

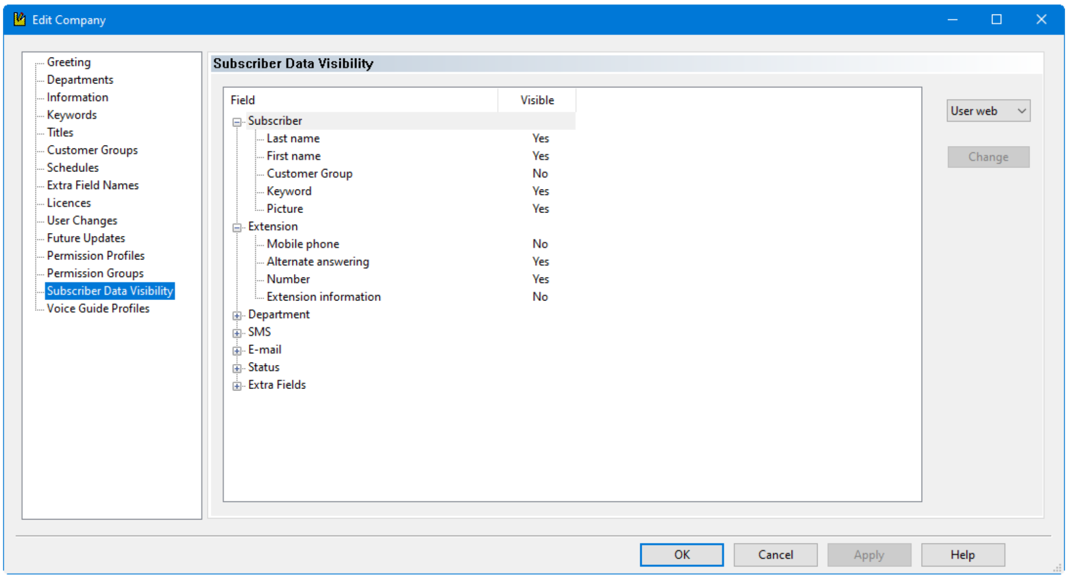
Schedule

Add and remove schedules for all selected users.

3.1.4.4 Hiding fields for Trio User and Trio Guest

It is possible to hide fields from the applications Trio User and Trio Guest. The settings are done for each application individually.

Most user fields, including referrals, presence and line status can be hidden.



3.1.4.5 How is it licensed?

The Trio Administrator is included in the Trio Core server license.

3.1.5 Enterprise Administrator Web License (Trio Administrator Web)

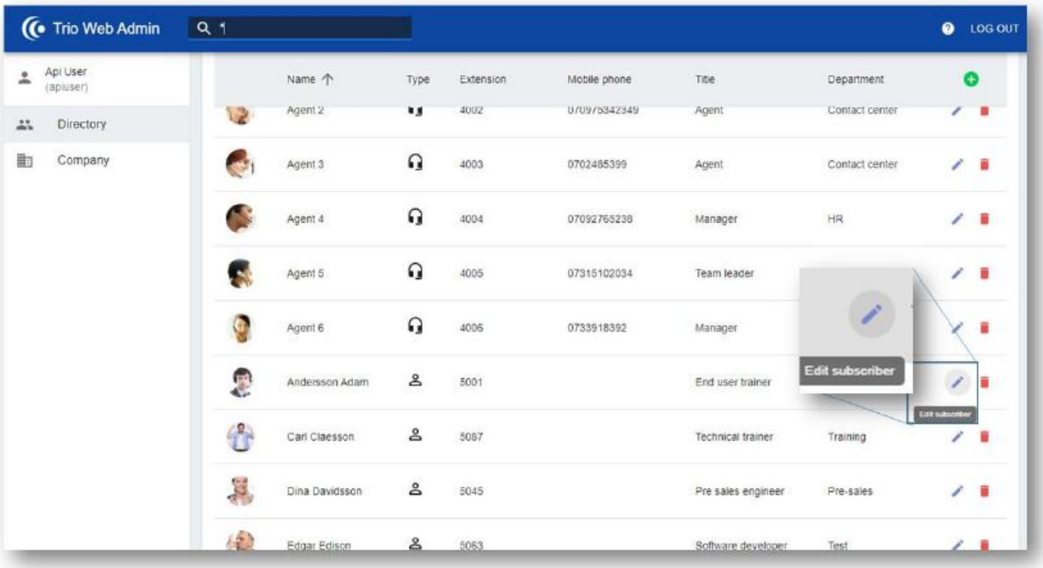
3.1.5.1 Customer benefits

As an addition to the Trio Administrator a lightweight web based Company Directory administrator is available from Enghouse Trio 8.1, the Trio Administrator Web.

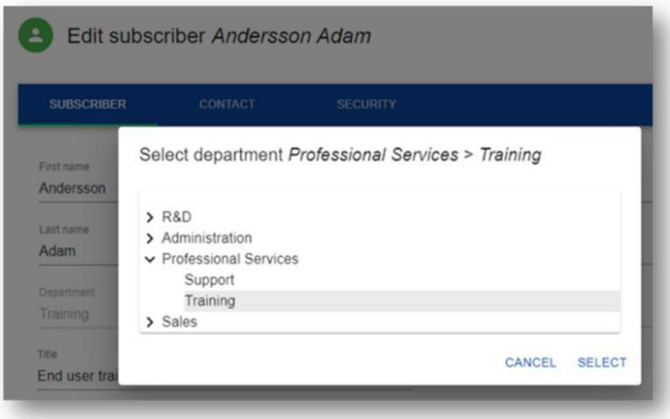
Customers are today looking for easier access to their daily tools needed to maintain the systems. To create a cost-effective and easy to deploy environment the administrative tools for Enghouse Trio will become available through a suitable Internet Browser such as Google Chrome or Microsoft Edge.

This gives

- Simple handling of updates without the need of local software installation.
- Easy access from any internet connected PC where the focus are devices with keyboard and mouse.
- Enghouse Trio will have a more detailed access levels using the Trio Administrator Web that was not available in the Trio Administrator.

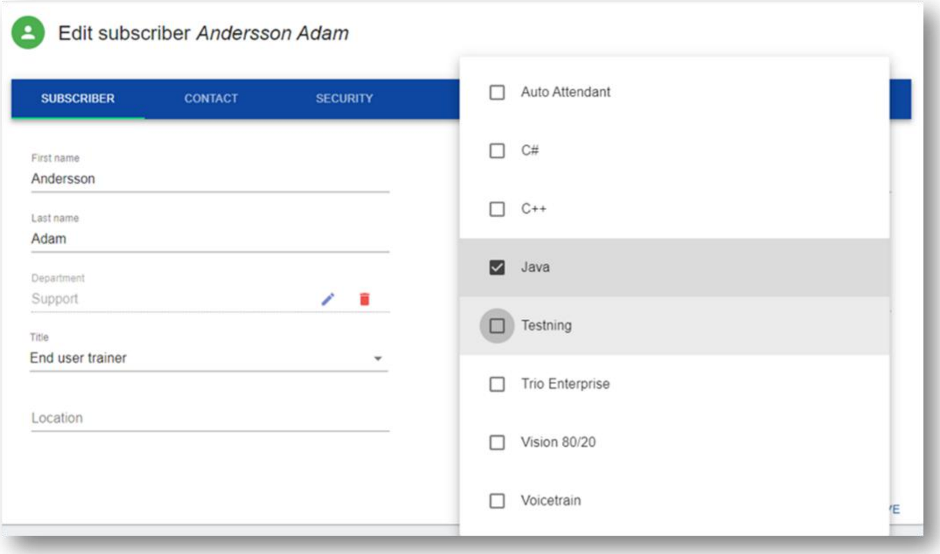


As first step in Enghouse Trio 8.1 the most common tasks needed to maintain the company directory will become available through the Trio Administrator Web.



The administrator can manage most common fields such as first name, last name, extensions, mobile, e-mail, SMS, department, title, location and customer group.

It is also possible to manage skills and information in the extrafields.



As listed above most of the subscriber data is available for management over the web, without the need for an installed client

3.1.5.2 New way of managing changes

In Enghouse Trio Web focus is to streamline the daily tasks, making it easier to manage and maintain the directory.

The new user experience opens up for new possibilities that were not available in the Trio Administartor and way of working has been reorganized by combining settings into the same dialogues creating a better flow.

3.1.5.3 Security and access

Access to the Trio Administrator Web is separated from the access to Trio Administrator Client CD or CC Administration; this means that a Trio Administrator Web can be limited to:

- Only be able to logon to the Trio Administrator Web and not to the Trio Administrator Client
- The Trio Administrator Web can be limited to view, change or delete subscribers
- The Trio Administrator Web can be locked to a specific customer group without the ability to access other parts of the Company Directory

3.1.5.4 How does it work?

The Trio Administrator Web is installed on the Enghouse Trio server as a web application.

The applications is accessible though a URL in a supported web briowser and is available for all authenticated users with Trio Administrator Web or CD Administration permissions.

The applications supports Single Sign on meaning that the user authenticated and already logged on will be able to use the Trio Administrator Web.

The application can also be made available through DMZ to allow external access to the Trio Administrator Web from external computers.

3.1.5.5 Limitations

The Trio Administrator Web in Enghouse Trio does not handle the company directory wide settings, such as

The fields not available in the Enghouse Trio are:

- Greeting
- Information
- Department chart management
- Skills list management
- Title list management
- Creation of Customer groups
- Schedule management
- Extra field names
- Licences
- Accepting User changes
- Handling Future updates
- Management of Permission profiles
- Management of Permission groups
- Management of Voice guide profiles

Contact Center and IVR Administration is also in Enghouse Trio handled usind Trio Administrator or Interaction Studio.

3.1.5.6 How is it licensed?

The Trio Administrator Web is included in the Trio Core server license.

3.1.6 Enterprise Directory API

The modern Contact Center API that has been further enhanced with a Company Directory API.

3.1.6.1 Customer benefits

Many customers wish to integrate all systems with a central BI and other central systems.

Enghouse Trio makes it possible to benefit from integrations with HR/CRM systems and other support systems. The goal of Company Directory API is for example to open up the platform for streamlined integration with Human Resources systems to easier onboard new employees.

3.1.6.2 How does it work?

This API is a tool for partners or service providers building a service with Enghouse Trio as the base. Now they can easier manage the subscribers using the API. The central HR system can create users in Trio once they have started they work.

Enghouse Trio also opens the company directory for systems that need to gather information available in Trio. These systems could be local intranet where the data from the company directory in Trio shall be presented for easier access, for example, present if the person is available or not and when they will return.

3.1.6.3 Data available

External system will be able to update and gather the following data:

- subscriberId
- firstName
- lastName
- extensions list
- mobile number
- signature
- external id
- e-mail
- Department
- Title
- Location
- current referral if such is present.
- Extrafield
- Skills
- Department chart
- Customer Group

Similar data is also available for a more automated provisioning of Enghouse Trio. It is possible to add, update and delete subscribers in Trio using this API.

3.1.6.4 How is it licensed?

The Directory API is included in the Trio Core server license.

3.1.7 Enterprise Contact Center API

Enghouse Trio Contact Center API are based on web services enabling integration with many commonly used developing languages, offering a good security and scalability without decreasing the performance of the core system.

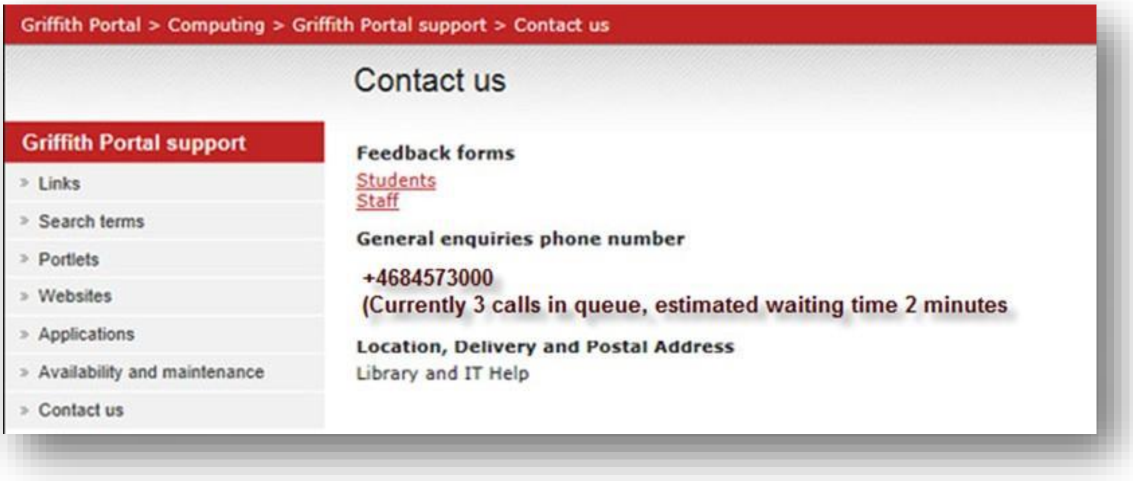
3.1.7.1 Customer benefits

The CC API opens up the status of the Contact Center and Attendant service. It gives the user possibility to enable integrations of external Wallboards and monitoring different platforms. The CC API is suitable for any external presentation of Contact Center status. In addition, the CC API can be used to log on agents and to initiate outbound calls.

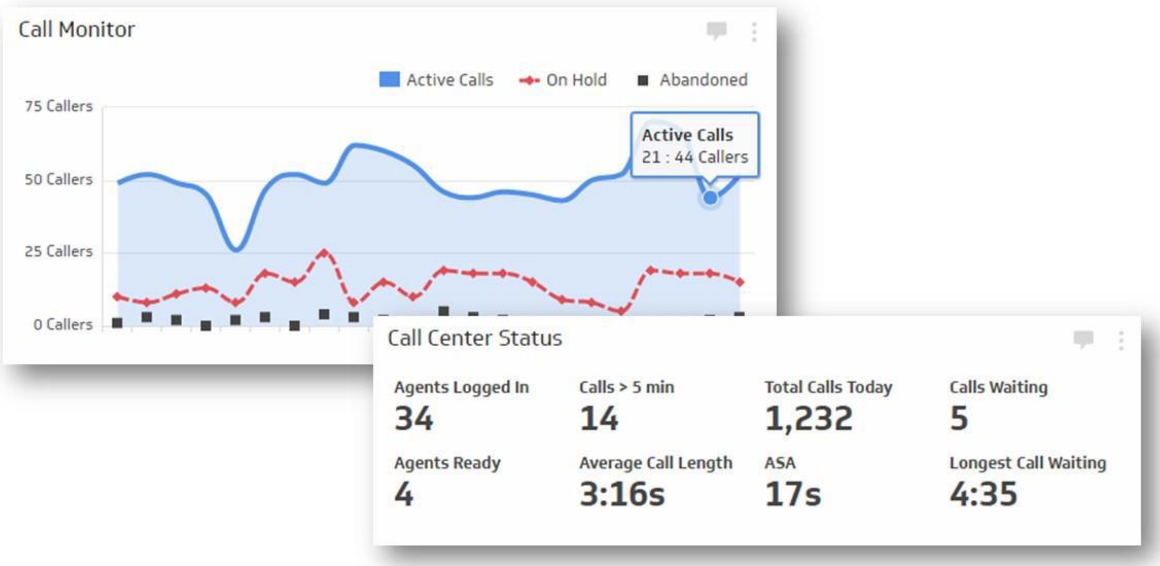
The purpose of the API is to make it available for Contact Center integrations such as:

- In real time, show the current agent/queue situation.
- Follow the status of different cases or tasks
- Telemarketing products for outbound calling

Since the API gives you access to information about the cases that are already in queue you can easily on your website see if a person has already sent an E-mail to the contact center and inform them about their current queue place.



The API gives the option to build wall boards on commonly used platforms such as Klipfolio. Klipfolio is a productwhere the same board can be published on web, desktop, smartphone or a tablet.



Using this API you can also try to externally steer the customer to use the most suitable way of contact based on the information in the Contact Center. On the websiteyou can display handling times for different media.

By displaying the status of different channels you can try to make your customers and external contacts to use the channel where the agents are most effective.

Using the API you can obtain the information in real-time all the time.

3.1.7.2 How does it work?

Specific API users are created in Enghouse Trio by the CD Administrator for authentication. These accounts are used to gather the data from the Contact Center.

These accounts can be controlled by access profiles meaning that the customer can control which services and agents the different instances of the API can display.

The program/application that uses the API has to verify itself with the account created by the CD Administrator. The API is based on webservices using REST, status messages are sent in a JSON-format.

For external internet access a separate DMZ proxyserver is recommended together with encrypted access.

3.1.7.3 Considerations

There is a limitation when an API user requests to list all cases in a certain service, the system will return a maximum of 20 cases. If a certain case is known it is possible to request information about this specific case based on its ID.

3.1.7.4 Data available to gather

3.1.7.4.1 Agent

Both agent's configuration data and status is possible to retrieve.

- Status data contains;
  - Name, status, current role, private queue status, logged on number, agents number, client type, current case ID worked on,
  - Number of cases handled, not answered, assigned today
  - Last Activity Change Time, total ready time,

3.1.7.4.2 Case

Cases are listed per service to obtain the case ids. Once the case ID is known, the specific case can be tracked. If a specific case is known, for example if created as a task using the CC API, it can be searched for to get details about if it has been worked on by an agent..

- Status case data contains;
    - Cust (customer set), ID, service id, case class (chat, call etc), case type (msg or feed)
    - Wait time, Arrive time,
    - Calltag, subject, body, custom call and data parameters.

3.1.7.4.3 Service (queue)

Both service configuration data and status is possible to retrieve, examples of most important information is:

- Name, Id, open/closed/, arrived cases today, answered cases today, refused cases today, abandoned quickly today, abandoned late today,
- Current service level, acceptable service level,
- Number of agents logged on, number of agents ready, number of agents ready and free,
- Maximum wait time, lowest wait time and average wait time.

3.1.7.5 How is it licensed?

The Enterprise Contact Center API is included in the Trio Core server license.

3.1.8 Enterprise Line Server License Art.No. TRIO-P001115

3.1.8.1 Customer benefits

If the system shall handle phone calls the Enterprise Line Server License is mandatory. The Enterprise Line Interface server is also used for setting up additional servers, for a couple of different reasons:

- It increases line capacity
- It allows different levels of redundancy
- Can be used for a geographically spread solution, where calls mostly should be handled locally, but offers support for another location, answering their calls when the load is high.

The Enterprise Line Interface server is controlled by the centralised server and communicates over the network connection, using IP network.

3.1.8.2 How is it licensed?

- One license per server is needed if the system shall handle phone traffic.

Requirements:

- Enterprise Line license (Art.No. TRIO-P004110)

3.2 Enterprise Server Interaction licenses

3.2.1 Enterprise Mail Server License Art.No. P002110

3.2.1.1 Customer benefits

The Enterprise Agent Contact Center license expands the service options, allowing customers to communicate with the customer service, through a number of different ways. These are intimately connected to the company's message system (Exchange/Office365)

- E-mail messages
- Voice mail messages

The Mail addition gives control over most of the company's incoming mail contacts, including distribution rules, priorities and complete statistics. This module may route e-mail messages based on keywords, saving a lot of time in distributing enquiries to the correct person. It also prevents messages that have been forwarded to a specific person, from remaining, unopened, in that person's mailbox. Instead it automatically returns the message to the customer service after a set time, and saves the company from getting an unsatisfied customer. If a customer calls to check what has been done about his enquiry, the system can try to route that call to the specific agent that handled the e-mail. This can save a lot of time, for both the customer and the agents. Bottom line: It is up to your customer to decide how he wants to communicate with your company, and it's up to your company to respond appropriately, through your contact center.

3.2.1.2 How is it licensed?

One license is required for up to 10 Contact Centers in one Enghouse Trio server.

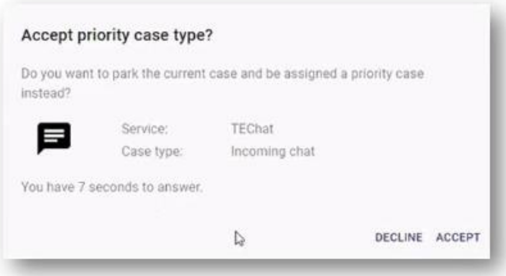
3.2.1.3 Requirements

- The message system must be Office365/Exchange
- It requires an Enterprise Agent/Attendant (Art.No. P011210) and an Enterprise Agent Contact Center license (Art.No. P012210) for each agent that simultaneously handles these additional case types.
- The agents must have local Outlook or OutlookWeb Access

General for all messages
All the case types mentioned above are stored in different message boxes in the company's message system (Exchange or Office365). Enghpouse Trio is configured to monitor the selected message boxes and insert the cases into proper services, and then distribute them according to the skills and priorities set up for each service.
The message itself does not move. It is only the case "to handle the message" that is inserted into the service. So these messages do not require any extra backup, since they never leave the message system.
When an agent is selected to handle the message, it is opened in the agent's normal message handler (Outlook or Outlook Web Access). The agent gets a familiar interface to handle the message and to access all the features he/she is used to (like spell checking, signature picker, standard replies, etc).
If that message needs to be forwarded to a specific agent suited to handle it, this can be done from within the Enterprise Agent Client. The Enterprise Server then monitors the case, and if the message has not been opened after a set time, then the server will automatically return the case back to the queue and select another agent to handle it.

3.2.1.3.1 Park offering

Since it is often much more important to respond quickly to interactive cases, like incoming phone calls and chat conversations, than to handle a message case, message services may be set to allow a function called a *park offering*.
Let us say that there are no available agents for a call. There are agents that have the right skills, but they are currently busy with a message case. In this case, the system can offer one of these agents to park his/her message and handle the call instead.

Web Agent	Windows Agent
	

When the phone call is finished and there are no more phone calls, the system may automatically offer the agent to continue with the message case.

Web Agent	Windows Agent
In Web Agent the parked case is automatoically picked up once the high priority case is finished	

This handling keeps waiting times for phone calls and chat conversations to a minimum, and at the same time makes sure there is an even flow of cases to handle for the agents.
Below is a description of each message case type:

Email

The server monitors select e-mail message boxes. Each time a new e-mail arrives it opens the e-mail and scans the subject and body for keywords, keyword combinations and customer identities. The information found can be used for a number of things:

- Route the e-mail to the most suitable service, based on key words found.
  This shortens the handling time and generates quicker responses to the customer
  - The keywords can be found in the subject or in the first 1000 characters in the body of the e-mail.

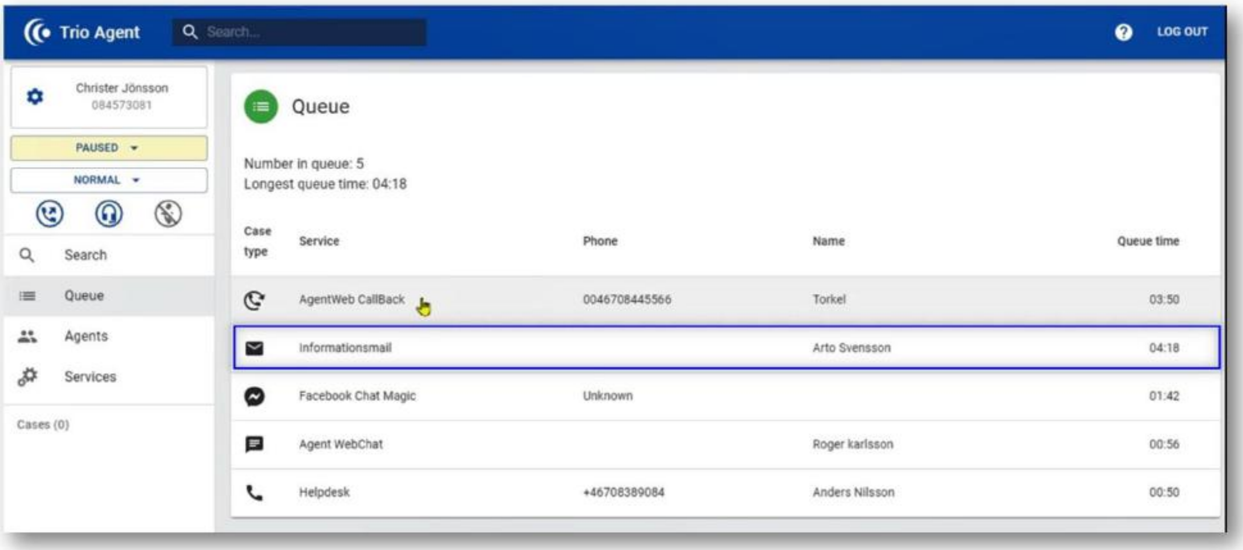
- If a customer identification exists (found in the subject, body or by using the sender's address), one can:
    - Route the e-mail based on contact history
      Preferably to the agent that last handled this customer, if that contact happened recently.

    - Pick up contact history and present to the agent
      So that the agent immediately can see the latest contact for this customer

    - Fetch customer information from an external database
      (Requires P033910 Enterprise Connection per external system (CRM) or Enterprise Connection to Microsoft Dynamics (TRIO-P005190).
      This can also be used for routing and prioritizing.
    - Automatic handling
      If a certain text is found in an e-mail, for example "Would you please *send* me a *registration form*...." the system is able to act and perform an automatic task.
    - Screen pop
      (Requires other modules like P033910 Enterprise Connection per external system (CRM) or Enterprise Connection to Microsoft Dynamics (P005190). Automatically opens the customer's view in the company's CRM system.
    - Statistics and search

      Easily locates <u>all</u> contacts from a specific customer. You can immediately find a specific e-mail case, see which agent first opened it, and to whom it was forwarded. You can even right-click to view the message itself, or the reply from the agent (need configuration in the Exchange system).

When the e-mail case is inserted into a service, it is possible for the system to send an automatic confirmation that the message has been received and supply a case ID for the customer to use in further contacts.



E-mail in queue in Trio Agent Web

SMS (requires account from the mobile operator)

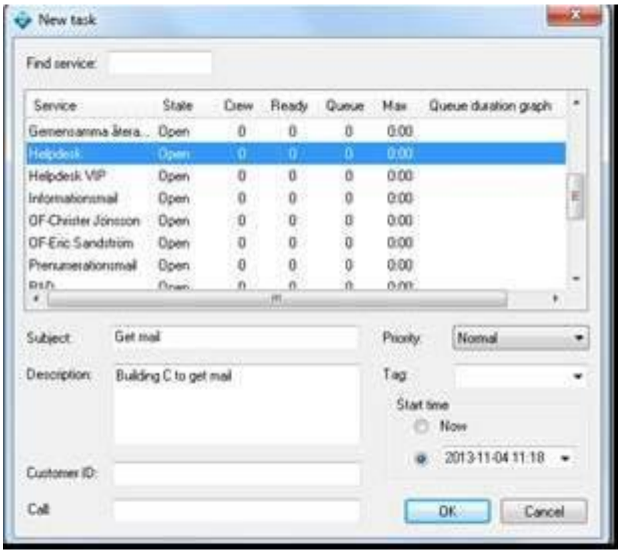
Inbound SMS receives SMS messages from the operator (see Trio Technical Requirements which operators are supported) and converts them into ane-mail messages, which are then sent to a configurable email address. This address can be supervised by Enghouse Trio. The same features available for e-mail are also available for SMS (because these are converted to e-mail).
Trios SMS solution enables you to reply to the SMS directly by responding to the e-mail. See the section on SMS Gateway for more information.

Voice mail

This function let's the caller leave a voice mail message instead of waiting, a message that is distributed as an MP3 attachment to an e-mail, and inserted into a service as a message case. It's played for the agent using the windows application associated with MP3 files. The message can later be retrieved using Enterprise Statistics.

Advanced tasks and call back tasks
A task is, simply put, a piece of work that needs to be done. There are three types of tasks:

Simple tasks:
These are included in Enterprise Server and do not require the Contact Center license.
Simple tasks can be inserted directly into a service or a personal queue. They have a subject and a message body. They can be inserted using the Enghouse Trio Agent/Attendant client or the Enterprise Contact Center API.



When distributed to an agent, the task is shown as a simple message box with the message body inside.

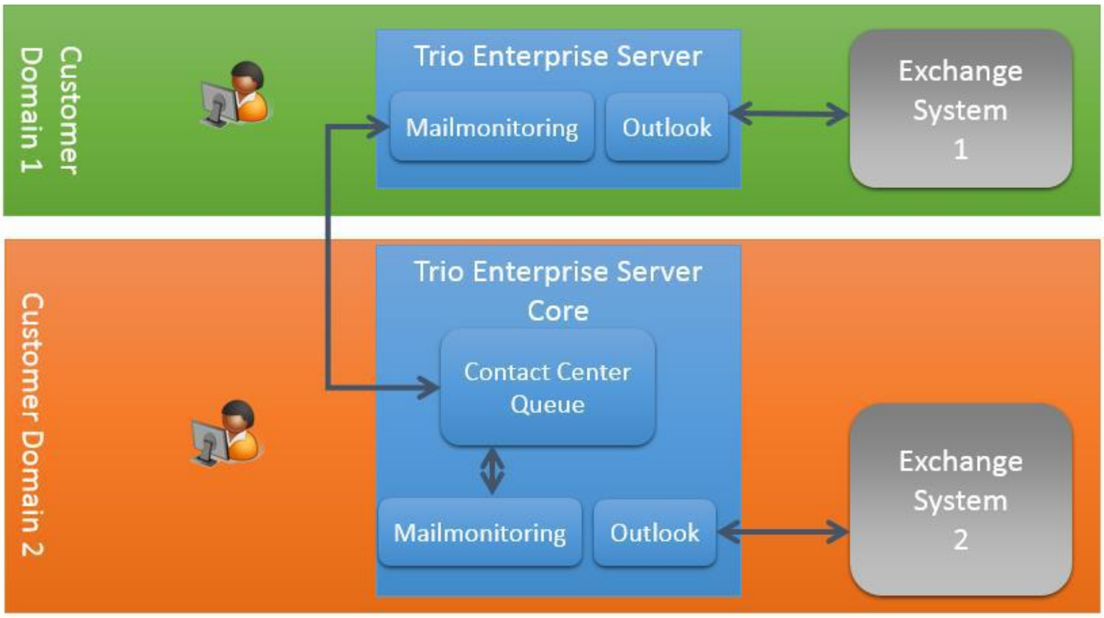
3.2.1.4 Different Domains and Multi Exchange mail system support

The Enghouse Trio server supports having one connection to an Exchange environment/system on the core server. The Exchange environment/system does not have to be in the same domain as the Enghouse Trio core server.

It is possible for One Contact Center instance to work with several separate Exchange environments/systems.

Observe that multiple Exchange environments/systems will require separate Enghouse Trio server for mail monitoring since one Outlook client cannot be used to access different Exchange systems on the same time.

Every mail monitoring server will be setup to monitor certain SMTP domains, this way the administrator specifies whet mail addresses shall be handled in which queue and the right mail monitoring server handle the right mailbox.



In the example above Exchange system 1 is handled by a separate Enghouse Trio server while Exchange system 2 is handled by the Enghouse Trio server core.

The agents are located in different domains as well as the two Trio servers. This way the agents in Customer domain 1 can handle e-mail in exchange system 1 and agents in Customer domain 2 can handle the e-mails from Exchange system 2.

Note that it will seldom be possible for agents from one domain to handle e-mail from other domains, the agents Outlook klient will limit what domains/exchange systems can be logged on to.

3.2.2 Enterprise Social Media Server License TRIO-P002115

3.2.2.1 Customer benefits

In Enghouse Trio it is possible to get Twitter and Facebook posts into the contact center. The use of Social Media is increasing and today people are expecting to be able to contact the Company using the channels they find easiest and most convenient.

3.2.2.2 How is it licensed?

One license per Enghouse Trio Core server

3.2.2.3 Considerations

The integration does not support hashtags, for example #<company> or #<keyword> since these create a lot of traffic and should normally be handled in trend scanning tools. If the tweet, posts contains of a hashtag+text, Enghouse Trio can look for it the same way as words without hashtags, and route depending on keywords.

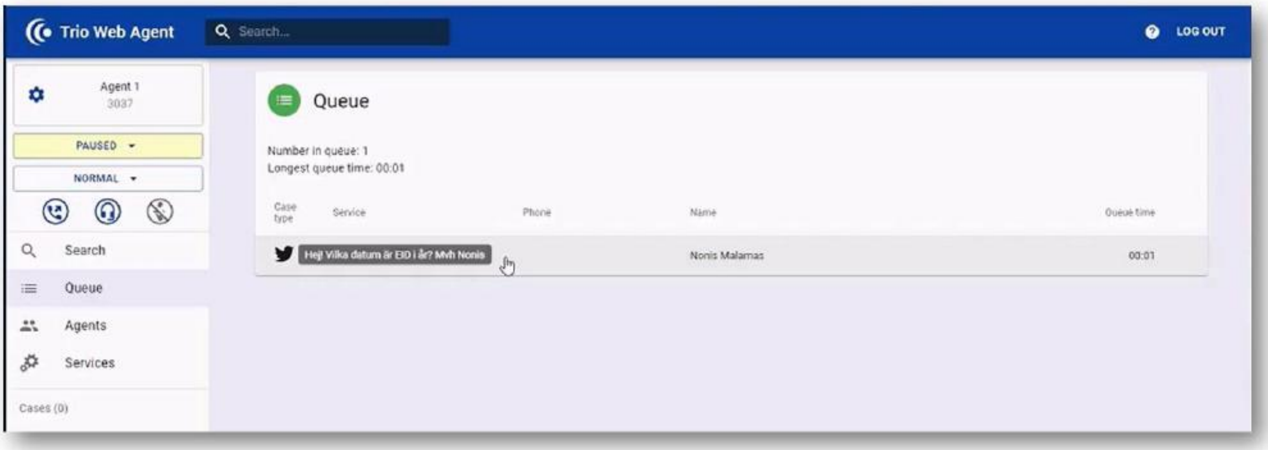
Twitter and Facebook as channels for the Contact Center can lead to a high load on the contact center, the queue might contain many cases from time to time.Therefore, we recommend usage of so-called buffer queues for the Trio services handling Twitter or Facebook.

3.2.2.4 Requirements

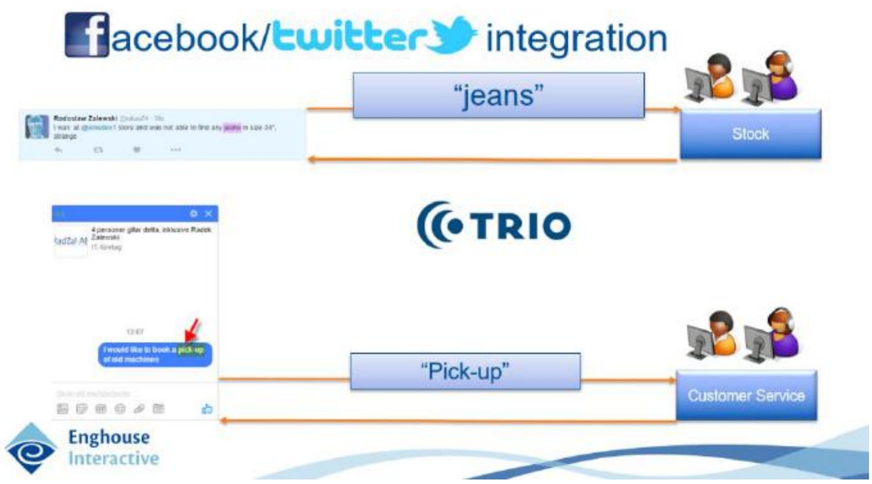
- Enterprise AgentClient (Art.No. P011210)
- The agent needs to be able to log in into the company Facebook and/or Twitter account

3.2.2.5 How does it work?

The integrations use the external API's from Facebook and Twitter. Enghouse Trio scan the Facebook and Twitter sites for new posts and create cases for agents to handle.



When a customer posts to the company Facebook page, tweets or writes a direct message, a case is generated in Enghouse Trio. The routing rules of a Twitter and Facebook case can be based on which type of posting the customer did and a keyword matching in the text message. Different queues can be used for Tweets and Direct messages or for posts, comments and chat messages so that the Direct message and chat messages that requires more immediate attention can be prioritized over Tweets and mentions or posts and comments. Depending on post or keyword the case will then be routed to the proper Service in the Contact Center.

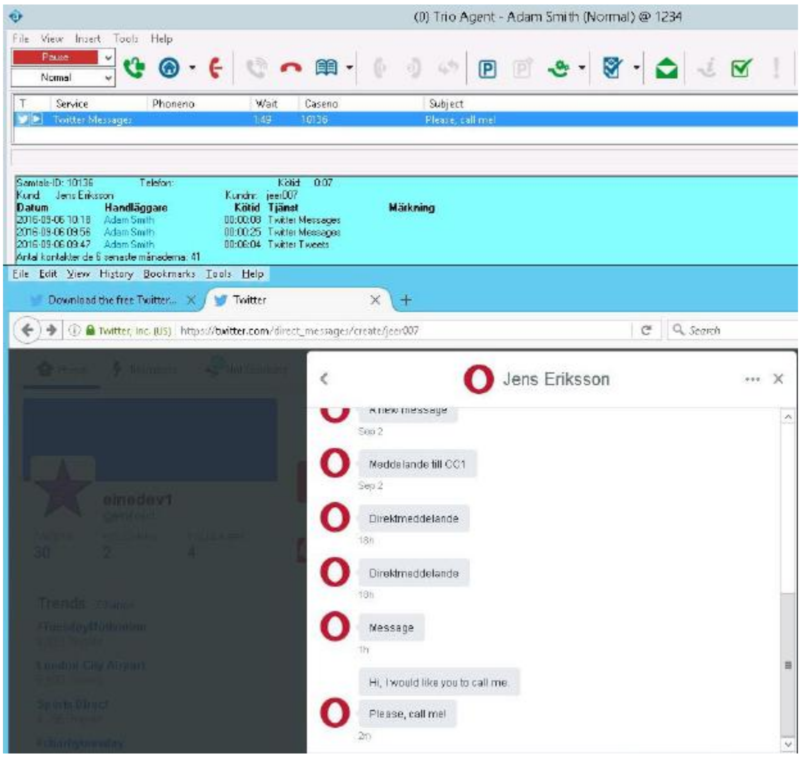


3.2.2.6 Twitter

Enghouse Trio integrates with Twitter in order to scan the customers Twitter page for new Tweets and Direct Messages.

- Tweets: Mentions and Replies supported (@Company username is written in tweet)
- Direct Messages to the @Company

When the agent answers the Twitter case, the Twitter page with the related post will pop for the agent.



3.2.2.6.1 Handling the case

The Agent can have the case open regardless of if it is a Tweet or Direct message, this way new posts from the external Twitter user will automatically be handled in the same Trio case. Once the Agent hangs up the Trio case, new comments and messages will be handled as a new Trio case. If the case comes from the same Twitter user the same Agent feature (green shirt man) in Enghouse Trio is used to assign the best suitable agent to handle the case. This so that the agent can benefit from the context and respond in a more personalized and consistent manner

3.2.2.6.2 Enterprise Statistics

Twitter as media is available as a separate message type in Enghouse Trio Statistics. However the contents of the conversation are not available in the reports.

3.2.2.6.3 Content scanning

The 140 characters in a Tweet or direct message are scanned for keywords by Enghouse Trio and can be routed upon.

3.2.2.6.4 Multiple Twitter Accounts

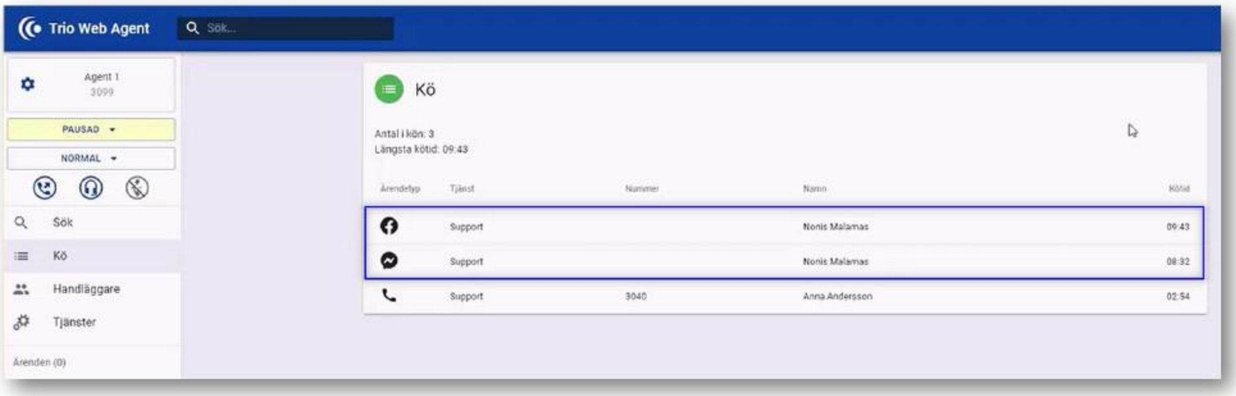
One instance of the Enghouse Trio Contact Center can support multiple Twitter Accounts.

3.2.2.7 Facebook

Enghouse Trio uses Facebook API's in order to scan three different types of postings at the customers Facebook page:

- Wallposts
- Comments
- Instant Messages.
- Reactions (see below)

When the agent answers the Facebook case, the Facebook page with the related post will pop for the agent.



3.2.2.7.1 Handling the case

The Agent can have the case open regardless of it is a post, comment or chat message, this way new messages from the external Facebook user will automatically be handled in the same Trio case. Once the Agent hangs up the new Facebooks posts will be handled as a new Trio case. If the case comes from the same Facebook user the "same Agent" feature in Enghouse Trio (green shirt man) is used to assign the best suitable agent to handle the external Facebook user. This so that the agent can benefit from the context and respond in a more personalized and consistent manner.

3.2.2.7.2 Reactions

Enghouse Trio can handle the different reaction types in Facebook. The customer may setup their Facebook integration so that for example Sad and Angry reactions are queued while other are discarded,

To route reactions like sad and angry into different queues in Enghouse Trio and that way get statistical date for these type of reactions can be interesting to follow up.

The agent will see information about what the case is about, since reaction types do not contain any text. The agent will see the name of the Facebook sender and the type of reaction in text (see below). The text is saved as subject and message body, it is also available in case preview and can be used for routing.

	Text in subject/body	Routable and available in cas preview	Other
Like	Like	Yes	Discarded as default
Love	Love	Yes	Discarded as default
Haha	Haha	Yes	Discarded as default
Wow	Wow	Yes	Discarded as default
Sad	Sad	Yes	Discarded as default
Angry	Angry	Yes	Discarded as default

3.2.2.7.3 Enterprise Statistics

Facebook as media is available as a separate message type in Enghouse Trio Statistics. However the contents of the conversation are not available in the reports.

3.2.2.7.4 Content scanning

The 140 characters in a comment, post or chat message are scanned for keywords by Enghouse Trio and can be routed upon. Facebook instant messages (Messenger) can not be scanned since Enghouse Trio will not get the text to be scanned.

3.2.2.7.5 Multiple Facebook Pages

One instance of the Enghouse Trio Contact Center can support multiple Facebook pages.

3.2.3 Enterprise Outbound call Server License Art.No. P002120

3.2.3.1 Customer benefits

The Outbound call module enables the company to insert lists of customers to call in outbound call campaigns, into the Enterprise Server. The outbound calls can be distributed to the normal agents when there are no incoming cases for them to handle. They can also be distributed to a specific group of agents, currently only working with Outbound call campaigns. The number that will be displayed when the agent is calling out, will be the number of the service the outbound call case was generated for.
The server calls the customer automatically. It is also possible to activate external CRM applications to show a customer view, to make the conversation with the customer more effective.
In addition, it opens a window where the agent can easily enter the result of the conversation, for later processing, statistics, etc. Each result alternative may also result in a transaction to an external system, for automatic registration of an order, etc.
With the Outbound call module, a company can speed up handling the outbound calls so that more customers can be called, using fewer agents.
Multiple campaigns can be run simultaneously.

3.2.3.2 How is it licensed?

It is licensed per Enghouse Trio Core server.

3.2.3.3 Considerations

Consult the latest Technical requirements for a list of supported browsers

3.2.3.4 Requirements

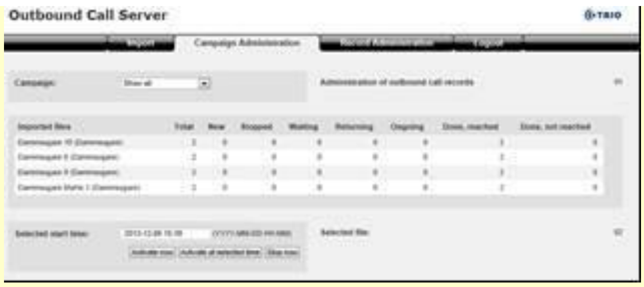
- The agents must use the Enterprise Agent/Attendant Client (Art.No. P011210)
- If the outbound call server should be integrated with a CRM or order system, you also require one Connection to external system (CRM) (Art.No. P005910) per external system or Enterprise Connection to Microsoft Dynamics (Art.No. P005190).
- To retrieve the results of the campaign, you also needs Enterprise Statistics
  - The Enterprise Outbound Call Server License is required for the Automatic Agent Server License (TRIO-P002180) and Auto Agent (TRIO-P002190) (see below)

3.2.3.5 How does it work?

The Outbound Call module contains a web based administration tool. It consists of three pages:

Import
On this page one specifies the format and the information in the files containing the customers' names and their phone numbers. These configurations can be saved with a new name to be used for more files with the same format.
When the configuration is completed, the file is read by the application and checked for errors (duplicate phone numbers, missing phone numbers, etc).
After that, the list is imported into the system where it is waiting to be activated

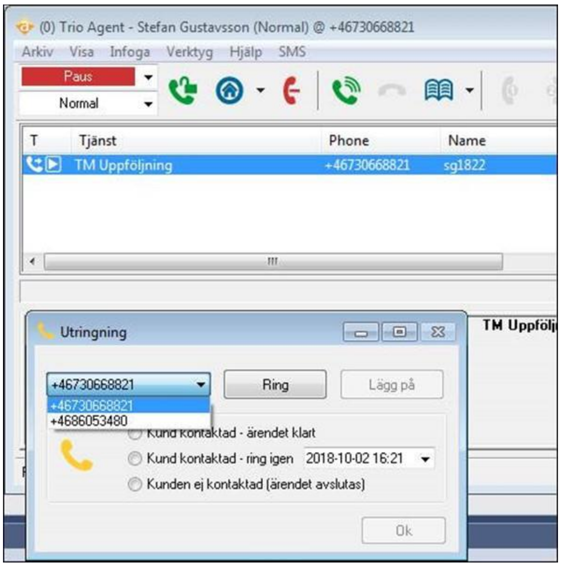
Campaign Administration
On this page one can see the status of all imported lists, how many customers have been reached, not reached, etc.
This is also where one activates a list. This can be done immediately, or set to be activated at a specified time.
There is also a possibility to stop an active list if the campaign has ended.



Record Administration
On this page one can search for individual call records, based on a number of different parameters. Each call can be stopped or reactivated.

When a list has been activated, the calls are inserted into the configured service and then distributed according to the normal distribution rules. When an agent is selected for an Outbound call and accepts it, the server automatically calls the customer. If CRM integration has been made, it is also possible to activate the CRM-system.

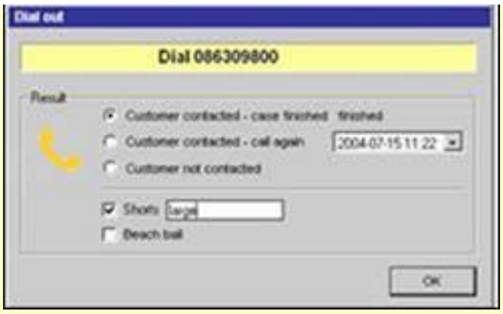
The agent can be presented with up to 6 different numbers to call for each outbound call case.



At the same time, a result window is opened for the agent, where he/she can report the result of the call. Each result alternative can generate a transaction to an external system, to register an order, etc.

If the customer is not reached, the system reschedules the call attempt in the same manner as for call back cases (see the Call Back section).

The results from the campaign can be viewed using Enterprise Statistics



3.2.4 Enterprise Web Communication Server License TRIO-P002125

3.2.4.1 Customer Benefits

The Web Communication Server is used to connect Trio Web Communication to Enghouse Trio. The benefit of a joint Enghouse Trio and Trio Web Communication is that the customer can use Trio Web Communication as one of the channels in the Enghouse Trio Contact Center, this allows a contact center to mix Enterprise Voice requests, Social Media requests and other channels available in Enghouse Trio with the advanced chat channel from Trio Web Communication into a single queue. The benefits are many, for instance a single agent skills definition inside Enghouse Trio reduces configuration complexity, joint queuing of incoming service request ensures that the customers are handled efficiently and that the contact center statistics can be followed up in one place.

3.2.4.2 How is it licensed?

It is licensed per Enghouse Trio Core server.

3.2.4.3 Requirements

- The agents must use the Enterprise Agent/Attendant Client (Art.No. P011210)
  For the agent to be able to receive cases and answer in the Web Communication clients:
    - Web Communication License (TRIO-P040110)
    - Advanced Chat Client (TRIO-P041115)

3.2.4.4 Considerations

A Enghouse Trio system running with integrated Trio Web Communication cannot use the eDialog24 chat client (TRIO-P005180). An agent and/or service can not mix Trio Web Communication and Enghouse Trio chat (TRIO-P002130). See Enghouse Trio product description for further explanation of those articles.

The Enghouse Trio contains of four different chat programs. Below is a chart if how these chat programs can be run in the same Enghouse Trio server.

	Trio Chat	SFB	Web Comm.	eDialog24
Web Comm.	Not same service/agent	OK	-	NO

3.2.4.5 How does it work?

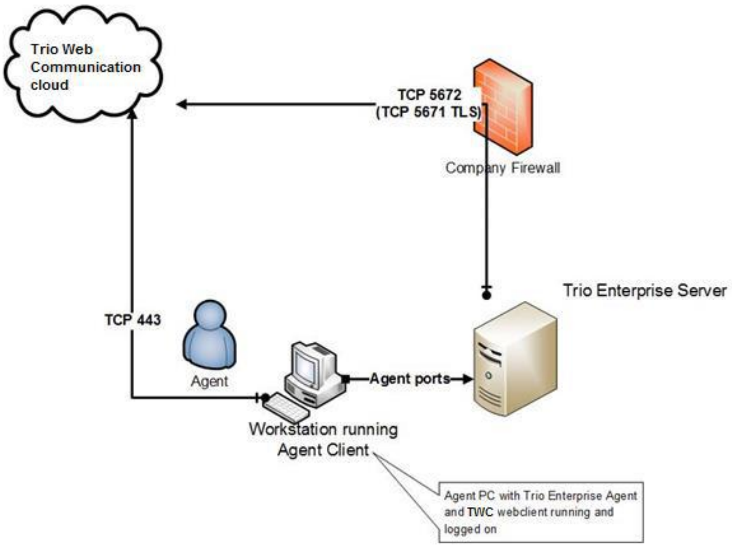
3.2.4.5.1 Connection

The integration is configured to join a Trio Web Communication Competence Group with a Enghouse Trio Service. In Trio Web Communication you can choose which Competence Groups that are integrated with Enghouse Trio.

The connection between Trio Web Communication and Enghouse Trio enables Trio Web Communication signal incoming chats to Enghouse Trio, the chats are queued in Enghouse Trio and the agent is hunted. When an agent accepts the chat, the Connector signals back the Trio Web Communication which Agent the chat shall be sent to, and the agent handles the chat in the Trio Web Communication client.

Integration between Trio Web Communication and Enghouse Trio relies on Enghouse Trio initiating a session with Trio Web Communication cloud. All interactions are based on this session and therefore a DMZ based proxy server in not required. The Agents have the Trio Web Communication client open and logged on is used to handle the messages in Trio Web Communication.

The API / Connector between Enghouse Trio and Trio Web Communication cloud is used for control of the conversations, it is encrypted but no sensitive information is exchanged over that link.

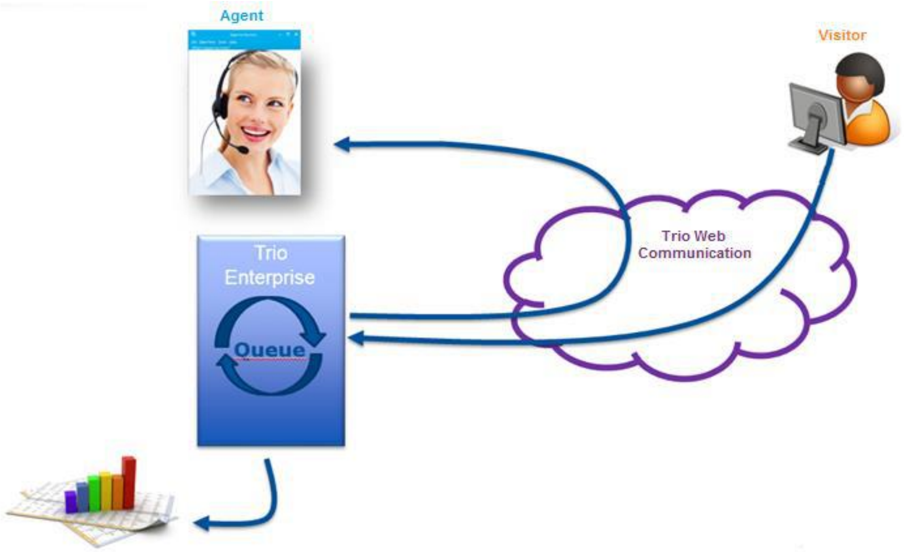


The connector supports the following usecases:

- New Trio Web Communication chat that will be put in a queue to a service in Enghouse Trio
- Trio Web Communication visitor originated leave queue before chat is assigned to an agent
- Ending the chat in Trio Web Communication ends post processing timer in Enghouse Trio
- Transfer chat in Trio Web Communication can be put in a queue to a service in Enghouse Trio.
- A web call back case arrives from Trio Web Communication to Enghouse Trio and will be put in a queue to a service in Enghouse Trio.
- Gather visitor identity and report it to Enghouse Trio when the information is available.
    - This information can be used for routing of cases to correct services or for CRM pop
- Gather the chatlog and store it in Enghouse Trio statistics
    - This way the chatlog could be removed in Trio Web Communication and only stored in Enghouse Trio statistics.

3.2.4.5.2 Web communication and Enghouse Trio Agent

The agent will login to the Trio Agent/Attendant client and the web based Trio Communcation client (Advanced Chat client). When a visitor initiates a chat request on the customer website the case will be routed into a Enghouse Trio queue and distributed to an available agent depending based on skill and roles. The agent answers the chat case in the Trio Agent/Attendant client and starts chatting in the Advanced Chat client.



The way to work in Trio Agent/Attendant will depend on if the agent will work mainly with chat cases or switch frequently between different media cases. An agent working mainly with chat cases can use the tool to see the queue and answer the cases but have the Advanced chat client as the main window. If working with mixed media cases the Trio Agent/Attendant main window and the Advanced chat window will share the screen.

3.2.4.5.3 Considerations

In case of Enghouse Trio ending up in failover mode the Trio Web Communication connection is not active.

3.2.5 Enterprise Trio Web Chat Server License Art.No. P002130

3.2.5.1 Customer benefits

The Web Chat feature enables the end-user to contact an Agent in the Enghouse Trio system, using simple live chat. Chat offers personal assistance for your company's Internet business and helps customers to quick an easy customer service.
One of the most important success factors is offering personal assistance to first time users of the web page, to ensure that the customers will return.

Web Chat:

- Provides a positive first impression
- Improves the usage of the services available on your web page
- Promotes customer loyalty
- Gets the most out of your resources

3.2.5.2 Considerations

Trio provides a default web chat style, and the customer is required to involve his/her IT or Web department if it must be changed to fit the customer's external profile.
There is no picture of the agent in the customers Chat window. This feature was present in older Trio Chat application.

In a Enghouse Trio system running Enghouse Trio Web chat, an agent and/or service cannot mix Enghouse Trio Trio Web Chat chat and eDialog24 chat (TRIO-P005180) or Trio Web Communication Advanced chat client (TRIO-P041115).

The Enghouse Trio contains of four different chat programs. Below is a chart if how these chat programs can be run in the same Enghouse Trio server.

	Trio Chat	SFB	Web Comm.	eDialog24
Trio Chat	-	OK	Not same service/agent	Not same service/agent

3.2.5.3 Requirements

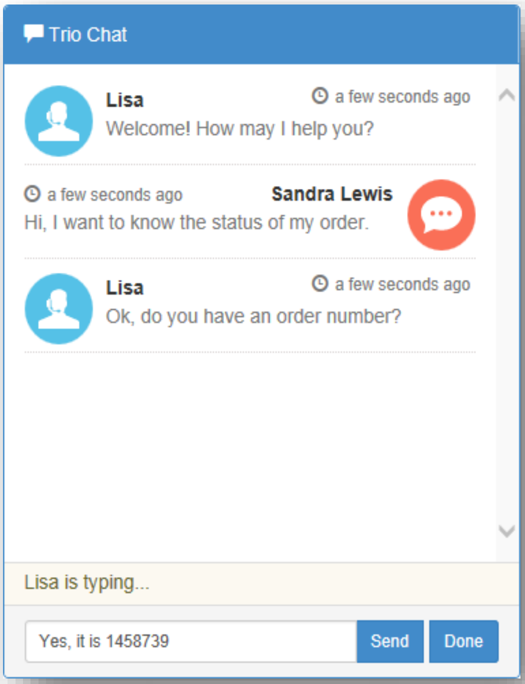
- Enterprise Statistics is required for searching and retrieving chat conversations
- A reverse proxy and port proxy should be installed and configured on the customer's web server if communicating externally.
- An SLL certificate is required to run on the Trio Server and the Webserver if secure communication is enabled.
- RabbitMQ and Erlang is required on the Trio Core Server (distributed by Enghouse Interactive).
- Only web browers that support WebSocket RFC 6455 are supported.
- Enterprise Agent/Attendant TRIO-P011210
- Enterprise Agent Contact Center TRIO-P012210

3.2.5.4 How is it licensed?

One license per Enghouse Trio server is required

3.2.5.5 How does it work?

- The end-user pushes a link on the organizations web page and is forwarded to a fill-out-form, located on the Enghouse Trio web server.
    - The purpose of the fill-out form is to gather information about the end-user required by the agent, e.g. name and customer number etc.
- The end-user is placed in queue, and the web chat application displays the current queue position in real time, until an Agent responds to the chat request.
- When the case is accepted by an agent the chat will be notified and the Web chat user interface will allow the user to start chatting. 500 characters is the limit to send at once both for the customer and the agent.



The Trio Partner and the Trio customer have the possibility to design the chat window for the customer. Trio will deliver a "shell" which is adjustable i.e. to change the colours so it will fit more into the website. Since the chat in most cases will be integrated into the public web site it is important it has the same look and feel as the rest of the site. It is possible to modify most of the appearance of the chat.

For example, the chat has different colors depending on the current state. These colors can be change. The default colors are:

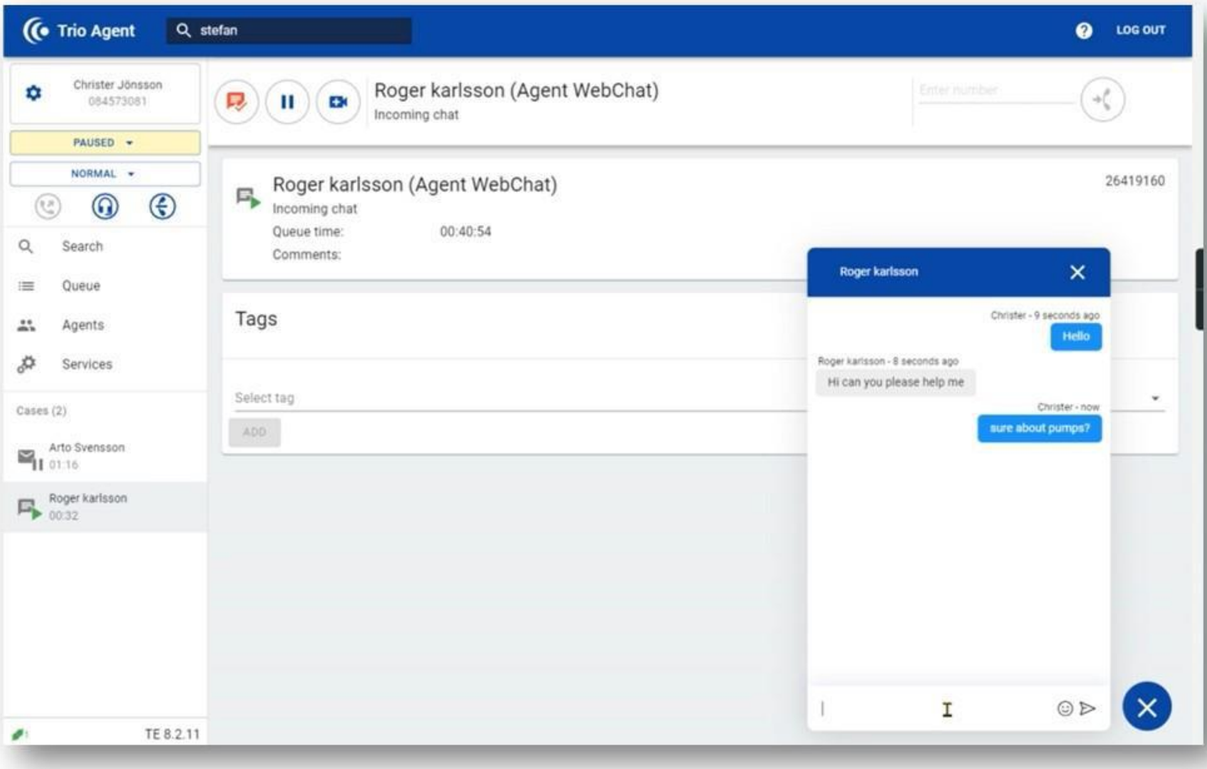
- Red: The customer has no contact to the server.
- Yellow: The customer has a connection to the queue server.
- Blue: The chat is ongoing.
- Gray: The chat is completed.

During the chat conversation the agent is able to:

- send predefined links, that the end-user can click on
- select among a set of predefined sentences, to be sent to the end-user
- send the entire chat conversation to the end-user, or any arbitrary address, by e-mail
- Have up to ten simultaneously chat sessions going on
- The agent can park a chat session to take another task, such as a phone call.
- The agent can transfer the chat session to another agent, the chat history will be included.

Agents view with three simultaneously chat sessions:

View in Trio Agent Web

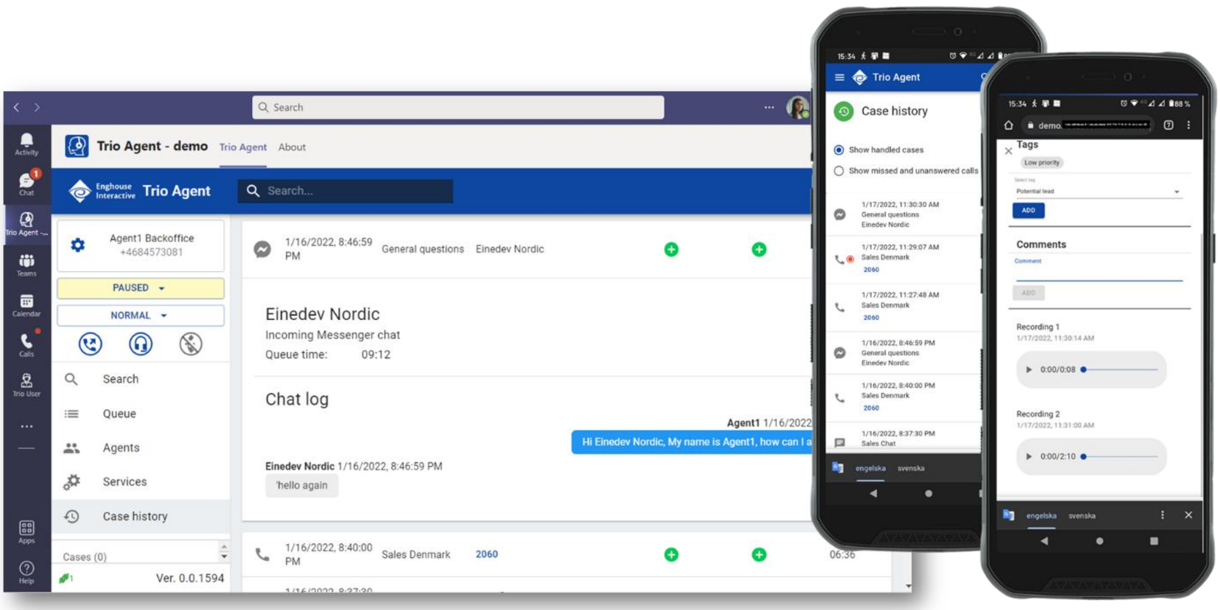


The entire chat conversation is logged to the database, and may be reviewed through the Agents Casehistory and the Enterprise Statistics.

Search and retrieve Chat history

From the Casehistory

The agent can see the chat conversation by using the Casehistory.

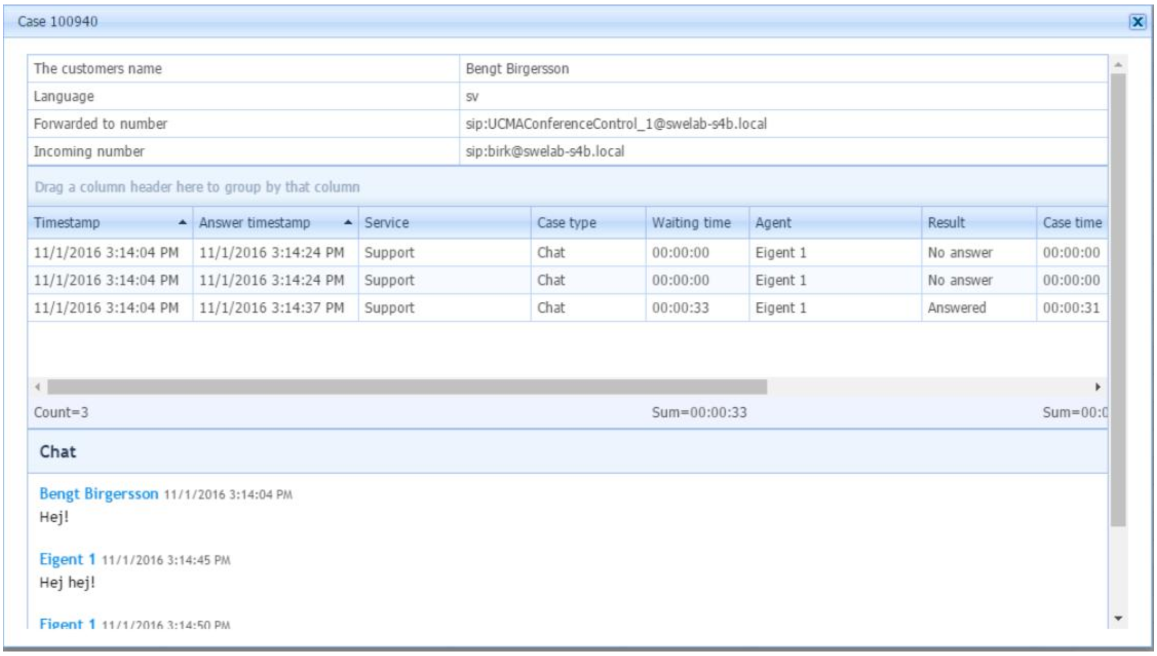


From the statistics

In Enterprise Statistics the Case search is used to search for chat conversations.
Output for service type Chat:

Tuesday	11/1/2016 3:14:04 PM	100940	Support	Chat	00:00:33	Eigent 1	Answered	00:00:31	Tag 4, Tag 3
Tuesday	11/1/2016 3:15:58 PM	100980	Sales	Chat	00:00:06	Eigent 1	Answered	00:00:48	Tag C, Tag A, Tag D

The job number can then be used to extract the entire chat conversation.



The chat history shows the conversation between the agent and the end-user. If a web site url is sent to the end-user, it is displayed as a hyperlink and if clicked it will be opened in a browser.

3.2.5.6 How is the solution implemented?

The Enterprise Web Chat Server is constructed of a web application and a number of services that are deployed on the Enghouse Trio core server. The web application is accessed by the end users through the customer's web site where reverse proxy and port proxy are used.

If the web chat will be used on the intranet a reverse proxy is most likely not required since the Trio core server is likely to be directly available to the users.

The Agent chat module is "integrated" with the Enterprise Agent Client.

3.2.6 Enterprise Skype For Business Chat Server license TRIO-P002135

For customers that are using Skype for Business as platform for their communication the ability to chat with internal or external parties using the same platform as used for speech (voice) is a natural way to communicate.

Enghouse Trio can handle Skype for Business chat cases as tools for the Agent to handle external or internal communication.

3.2.6.1 Customer benefit

To be able to receive Skype for Business chats as a case type into the contact center has several advantages. The Skype for Business chat cases will be handled with all other type of cases meaning that the chat cases will be priorities and distributed according to skill based rules. The agents will get a more structured working environment with all cases collected in the same application. The agents can after accepting the case work from the Skype for Business client which they are used to.

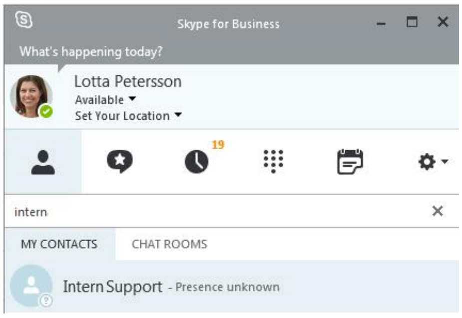
The agents, Skype users and external federated Skype for Business users can add voice to a chat session. This means that one can queue as chat and then once an agent has answered the chat can be escalated to a voice call. This is a great way to initiate communication with the contact center or helpdesk, especially for internal IT services when voice can be added when needed.

3.2.6.2 How does it work?

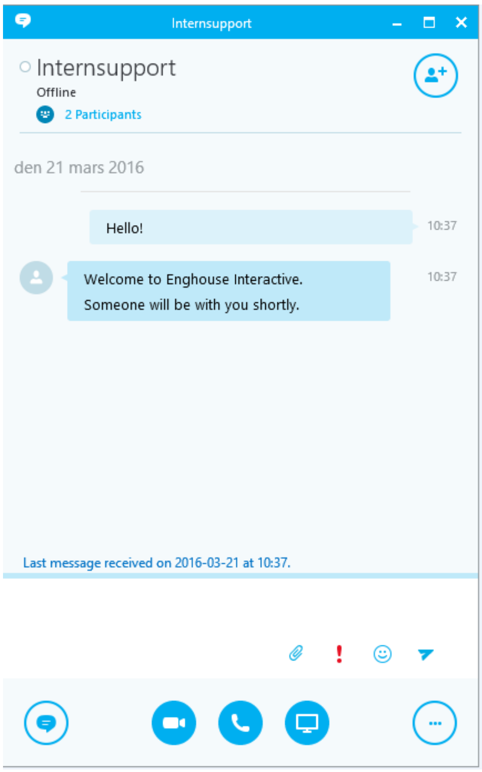
If the customer using Skype for Business has enabled federation with external parties these parties can use Skype or their own Skype for Business clients to initiate chat with the queues driven by the Enghouse Trio. Internal users can use the same functionality to communicate with agents by initiating conversations with the Contact Center queue using their Skype for Business client.

If there is no federation with external parties it will be possible for “anonymous” sources to chat in using a web form.

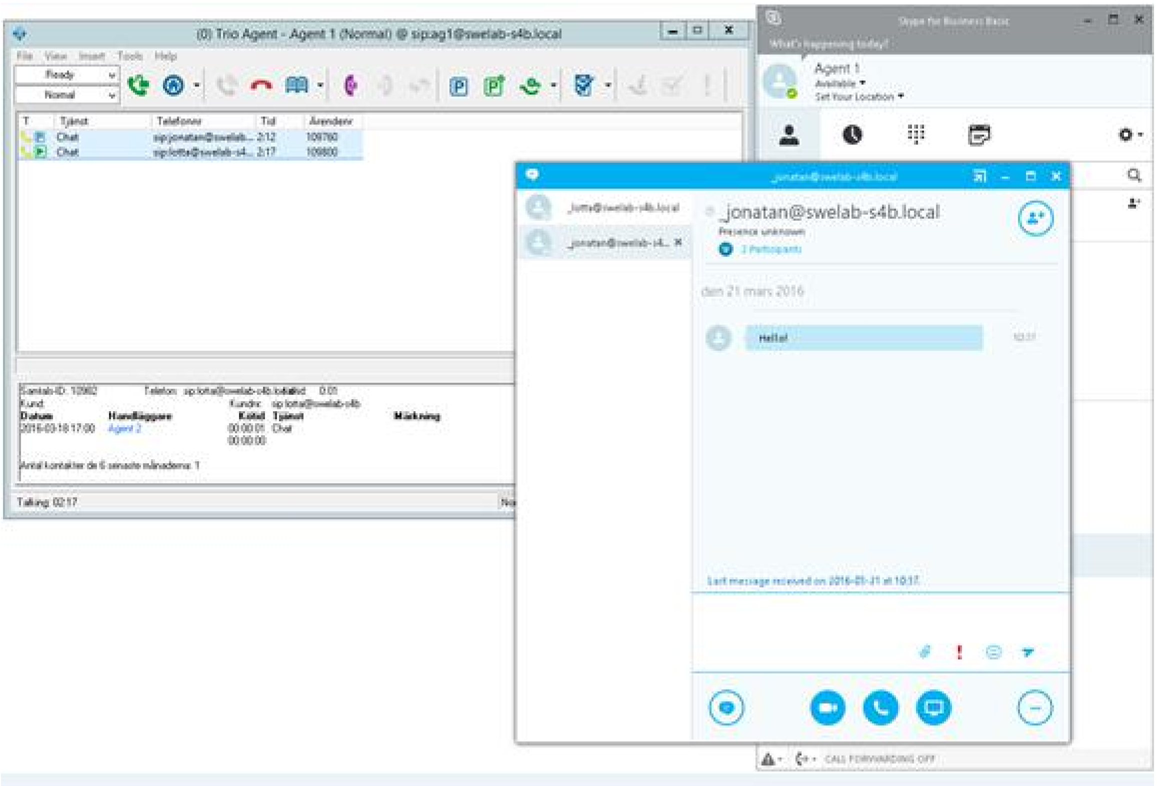
For example a customer or an internal user can start a chat with “Internsupport”.



When the customer initiate a chat in a “welcome massage” will displayed.



The agent with the right skill and competence will be able to see the incoming Skype for Business chat in the Agent/Attendant client. The agent can answer the case and the agents Skype for Business client will pop. If another chat arrives into the queue the agent can pick up that case too and have simultaneously chat cases going on at the same time. 10 chat cases are supported at the same time.



Transferring chat

The agent can transfer the case to another agent or service by searching for agents and services in the Trio Database and use the same transfer functionality as for calls.

The chat history is kept, so that chat messages exchanged by agents and customer are clearly visible for the new agent handling the case.

Formatting

The text will be formatted as plain text meaning that personal font and color settings will not be displayed.

3.2.6.3 Web form for non Skype for business users

By default Enghouse Trio comes with an initial web form that can be used to enable chat with external non skype users. The form relies on the Unified Communications Web API (UCWA) and enables anonymous chat.

Features available are the same as for Skype for Business clients:

The external user will see the preconfigured welcome messages when initiating the chat.

Both the external user and agent can see when the other party is typing.

Voice can not however be added to the chat using web form

3.2.6.4 Requirements

- Enterprise Skype for Business Chat Server License (TRIO-P002135)
- Enterprise Agent/Attendant (Art.No. P011210)
- Skype for Business 2019

3.2.6.5 Considerations

An incoming Skype for Business chat will consume one line license the same way as for calls meaning that two licenses will be required once an Agent has answered the chat.

Note that it is not possible to add voice to a chat initated over the web form, meaning that if you start the chat by not using the Skype for business client only chat is possible.

The Enghouse Trio contains of four different chat programs. Below is a chart if how these chat programs can be run in the same Enghouse Trio server.

	Trio Chat	SFB	Web Comm.	eDialog24
SFB	OK	-	OK	OK

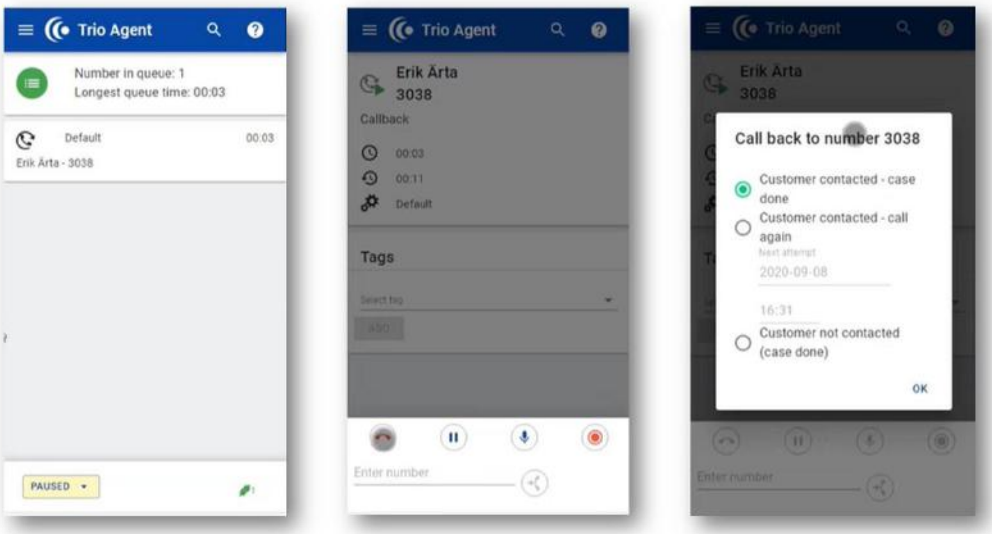
3.2.7 Enterprise Call Back server License Art.No. P002140

3.2.7.1 Customer benefits

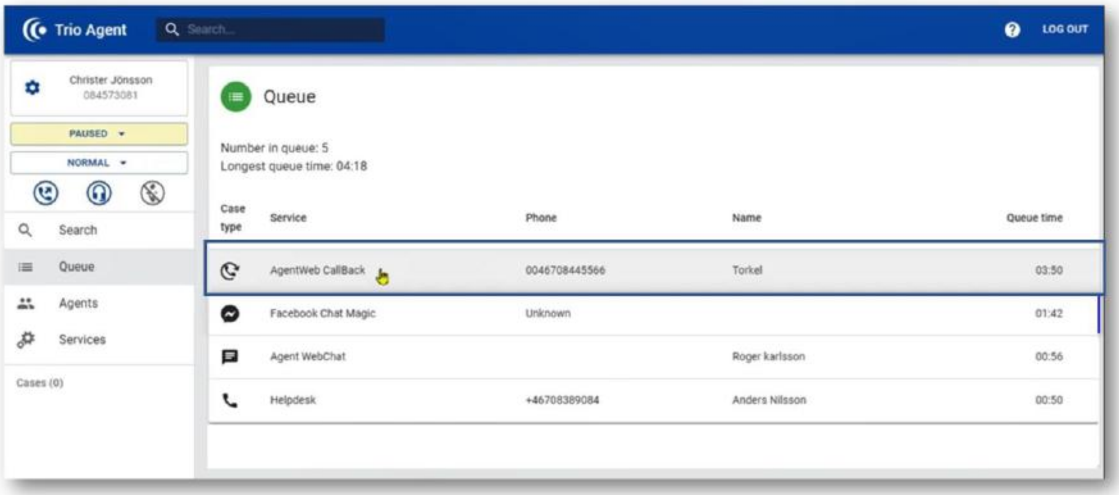
Sometimes it can be too expensive to ensure sufficient human resources for handling all peaks of the incoming call load. Instead of having to let customers wait longer periods in queue, the system can offer customers to enter a number, to be used for the company to call back. This way the company’s customer service will get a more even flow of calls to handle, while still keeping their customers happy.

3.2.7.2 How does it work?

When the waiting time becomes too long the customer may hear a phrase with the call back option. If the customer accepts the system will read back the A-number if there is any. The caller can accept the number or enter his/her phone number and the call back is registered. Normally, the call back case will take over the callers’ position in the queue, but there is also an option to put the case in another service with lower priority, to be called at a later time when the load is much lower.
The call back case is distributed and prioritized in the same manner as all other cases in the Enterprise Server (see the Enterprise Server for details).
The agents with the correct skills can see the waiting call back cases in the queue list of the Enterprise Agent Client.

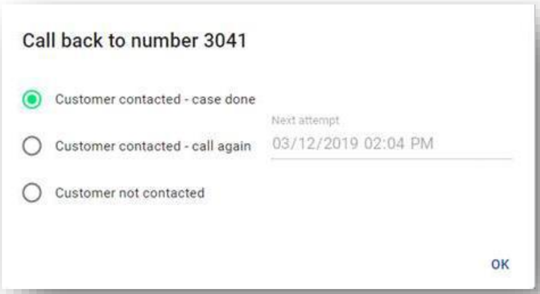


Callback handling in the mobile version of Trio Agent Web
The customer has the possibility to specify the service that shall receive the call back tasks, this way the caller that actually wait for the assistance can get better service than the ones that just order a callback.
The callback service can be given lower priority than the service where the call back was ordered.



One call back case is shown in the list

When an agent has been selected for the call back case, and he/she accepts it, the system will call the number that the customer entered. The number that will be displayed when the agent is calling out, will be the number of the service the call back case was generated for.
When the call is finished, a window is automatically opened, so the agent can enter the result of the call back.



Above the result of a call where the agent has not been able to reach the customer and chooses to reschedule the case.
The following alternatives are available:

- Customer contacted – case is finished
- Customer contacted – call again at a specified time
  Gives the possibility to choose when the case should be re-entered into the queue.
- Customer not contacted
  automatically re-enters the case into the queue after a preconfigured time.

The call back scheduler handles all re-attempts to reach the customer, so the agents will not have to bother handling this.
For each service one can set parameters deciding if call back should be used, the maximum number of attempts to contact the customer, and the period between attempts.

3.2.7.2.1 Call back in international environment

For distributed systems where the same agents are servicing callers from different countries, Enghouse Trio has the possibility to handle callback tasks from different countries. To achieve this special country specific queues are used.

3.2.7.3 How is it licensed?

One license is required for each Call Center in the Enghouse Trio servers.

3.2.7.4 Requirement

Call back requires that the agent uses Enterprise Agent/Attendant (Art.No. P011210).

3.2.8 Web Call Back

3.2.8.1 Customer benefits

Web Call Back, on your website, offers customers the possibility to be automatically called by an agent that has skills for a certain service, for example, your customer service or sales department.
This is an excellent lead generator for your company. Most customers appreciate the call back since it saves them both time and money.

3.2.8.2 Considerations

Trio provides examples of how the web chat forms should look, and the customer needs to involve his/her IT or Web department to adapt these to fit the customer's external profile.
Consult the latest Technical requirements for a list of supported browsers

3.2.8.3 How is it licensed?

One license is required for all Contact Centers Enghouse Trio server

3.2.8.4 Requirements

Microsoft.Net Framework is required on the agent side.
Web Call back requires that the agent uses Enterprise Agent/Attendant (Art.No. P011210).

3.2.8.5 How does it work?

The web components needed are located on the Enghouse Trio web server. A fill-out-form is accessed from the customer's web page. The fill-out-form contains fields the end-user has to fill out to send the call back request.

When the fill-out-form is completed the call back request is sent, together with the user input, to the Enterprise System.
Closed Service

If the customer requests a call back to a service that is closed, the customer will be informed that the call back was not accepted and will get information about the next time the service is open.

Open Service

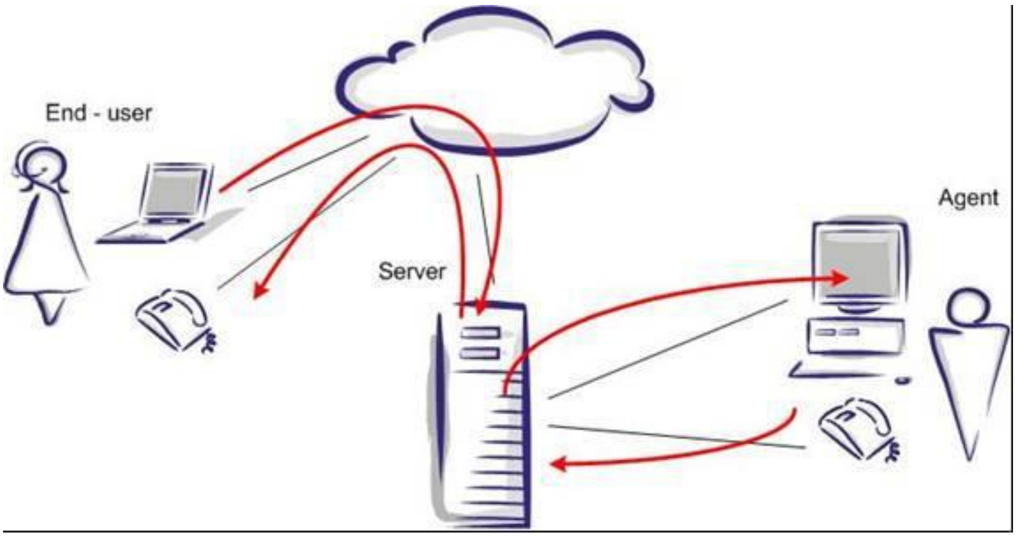
If the registration is accepted, the customer is notified about the position in queue. Update of the position is sent automatically, and is displayed to the customer.

The call back request is put in queue, like any other call in the system.

The customer is able to leave the queue by pressing the “Leave queue” button.

An agent picks up the call back request, and is presented a set of results to pick from before the session can be closed, similar to a Callback case.

3.2.8.6 How is the solution implemented?



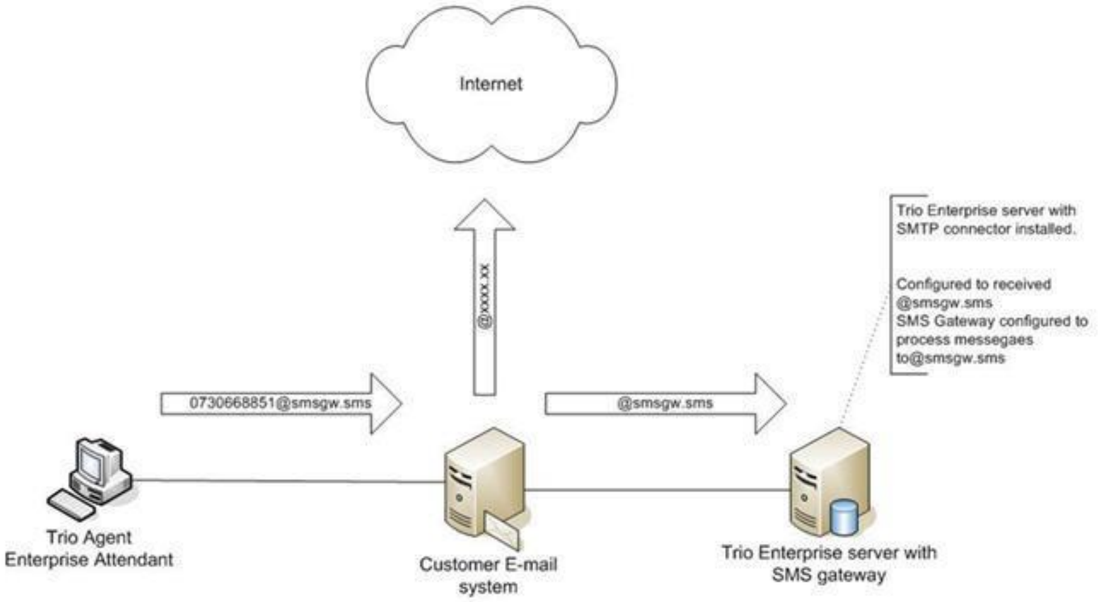
- The link from the customer web page goes to a configurable html fill-out-form.
    - The fill-out-form contains a set of input text fields with labels.
    - The fields are configured to be optional or mandatory.
- Once submitted, the input data is forwarded to an html pop-up window containing the current queue position
- The customer might, if needed, leave the queue by use of the same web page.

All configurations in the Web Call back are made in configuration files.

3.2.9 Enterprise Inbound SMS Server License Art.No. P002170

3.2.9.1 Customer benefits

Enterprise Inbound SMS Module is a two-way SMS to E-mail converter. It takes inbound SMS messages and converts them into an e-mail, which is sent to a configurable e-mail address. The content of the SMS message is sent in the body of the e-mail.
To reply to the SMS, simply reply to the e-mail, and enter the message in the body of the e-mail.
To send a spontaneous SMS, simply send an e-mail to an address with a format like:
<mobile phone number>@smsgw.sms. In most e-mail systems you can also create distribution lists, which gives the possibility to send SMS: s to groups of people. Features like spell checking, that might exist in your e-mail reader, will of course also work when sending SMS messages.
Observe that this feature can be used by all company employees and not only the Agents or Attendants, the Trio SMS gateway as it is called when used only for outbound messages will provide external SMS functionality for every one that has an account in the company mail system.



The Enterprise Inbound SMS Module can also be used together with the Mail Server License (Art.No. 7002110). The mailbox to where the SMS messages are routed can be monitored, and the messages routed to different services in the Enterprise Server. This enables the same features for SMS as for e-mail, e.g. to route SMS messages to different services, based on keywords in the message. See the e-mail section of the Contact Center chapter for details
Also note that the SMS gateway matches any sent SMS with an inbound SMS, for example when an SMS has been sent the text in the message to a certain mobile is also included in the last answer from the mobile.
This way the agent that receives an answer can easily see what has been sent to this person.
Please consult the Technical Requirements for a list of the SMS providers that Trio supports.

3.2.9.2 How is it licensed?

It is licensed per Enterprise Inbound SMS Module used for inbound SMS traffic.
SMS used only for outbound SMS is included in the Enterprise Core Server (Art.No. P001115) license

3.2.9.3 Requirements

The customer e-mail system must be configured so that e-mail to the domain smsgw.sms is forwarded to the Enghouse Trio server that has the Inbound SMS installed.
When using Enterprise Inbound SMS Server to receive SMS with Enghouse Trio you also need:

- Enterprise Mail Server License (Art.No. P002110)
- Enterprise Agent/Attendant (Art.No. P011210).
- Enterprise Agent Contact Center (Art.No. P012210).
- An account to send and receive SMS is needed; see technical requirements for additional information about supported operators.

3.2.10 Enterprise Automatic Agent Server License Art.No. P002180

3.2.10.1 Customer benefits

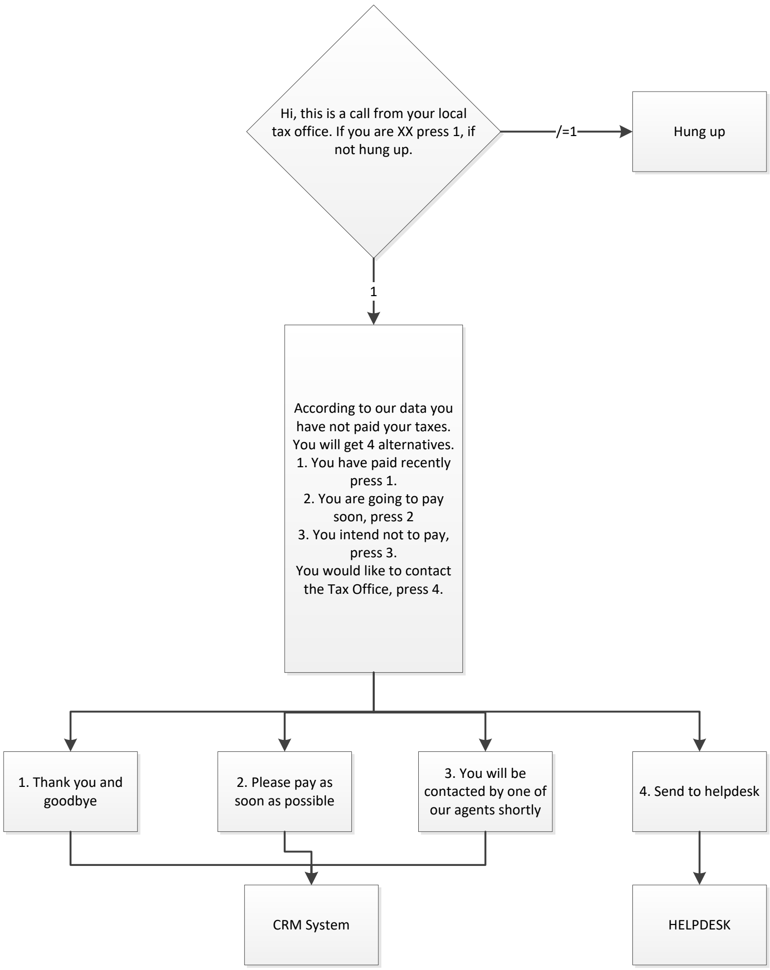
Enterprise Automatic Agent server is a new type of automatic agent that calls a customer and plays an IVR-dialog. It can be used for two things:

1. handle outbound calls inserted with the Outbound Call Server (TRIO-P002120).
2. handle the new feature *Customer Survey*.

Enterprise Automatic agent can be used when customers wants to call their customers to give information, ask for information etc. It is the system that will initiate and make the call, no human resources are needed. Recording is not supported for these services.

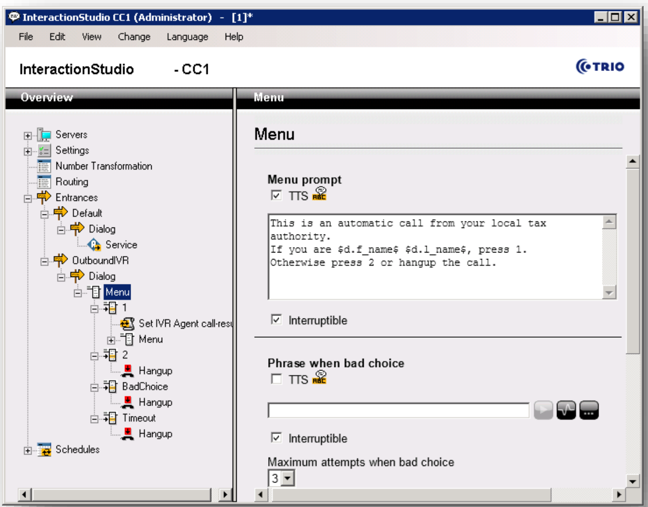
3.2.10.2 Enterprise Automatic Agent server license – Outbound Call

The IVR-dialogs that will be read for the customers are created in the Interaction Studio application in a similar way as for inbound calls. The calls will be handled by Auto Agents (Art.No. TRIO-P011140). Following is an example of a flowchart:



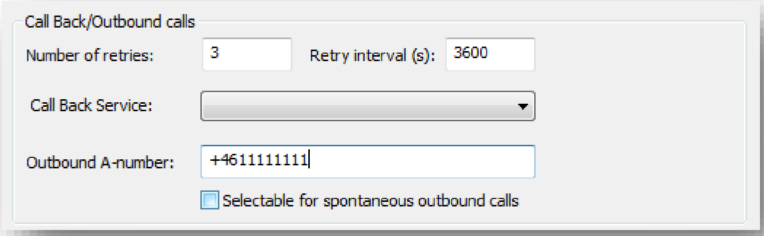
When an Auto Agent has made an outbound call that has been answered the IVR dialog will be run from an entrance that has been specified when the import of the call list file has been done.

Data from the call list file (like the customer's name) may be used in the dialog.



The Auto Agents are created in the same way as normal agents but with a separate type (Auto Agent). The Auto Agent has skills and roles as a normal agent and works according to the services open hours etc.

The customer may decide in what part of the dialog the call should be regarded as successful using the new verb "Set IVR Agent call result" in Interactions Studio. Unsuccessful calls will follow the normal retry settings for the service in the CC-Admin application.



3.2.10.2.1 How does it work?

- Create the dialog you need in Interaction Studio.
- Upload a list of calls to be made, using the OutBound Call Server
- See to it that the Auto Agents have skills for the Outbound Call service.
- Different customer selections will probably often lead to that we send some information to a 3'td party CRM-system. Let's say the customer presses 1 in the example above with the Tax Office. The Tax Office will probably have an own system and Trio will send the the information to that system for further treatment. The CRM-Connection will be done as a customization from the Enghouse Trio Professional Service department. It is optional to make a validation to the customers database, if the call that is to be made still is valid.
- It is possible to see the choice the customer made in Enterprise Statistics , Tags and the Case Search. It will look like calls coming from a normal Outbound Calls (Telemarketing)

3.2.10.3 Enterprise Automatic Agent server license – SURVEY

A Customer Survey is the tool for the company to get its customers opinion on the customer service that the company delivers. A Survey is usually held right after the customer has been talking to an agent and is asked to give the opinion on how the agent preformed. A survey is only possible to have if there is a call from a customer that the survey can be connected to. This means the outbound call functionality with Auto Agents explained under part 1 cannot be used as calling out to a list of customer to ask them to be part of a survey.

In this new Survey module it is possible to configure that the system will back after a while. This can be useful for companies that wants the get their customers opinion maybe after the service/goods has been delivered.

The Survey can be configured to work in three different ways:

a) The customer has to stay after the call to answer the Survey

b) The customer will hung up and an Auto Agent will call back to the customer to ask the Survey questions (Follow up Survey)

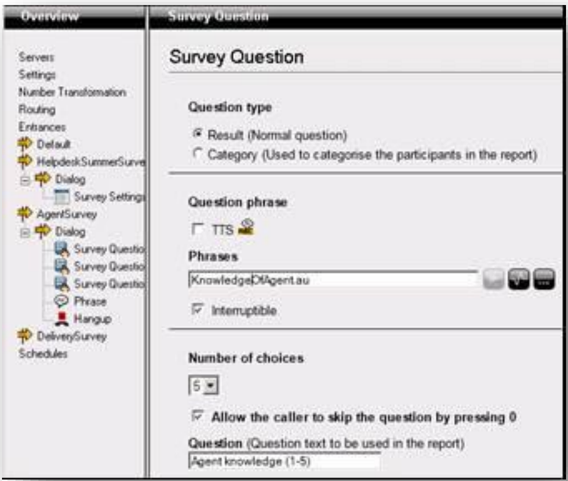
c) The customer should stay after the call but if the customer hangs up the Auto Agent will call back

Using a) means that no Auto Agents are necessary.

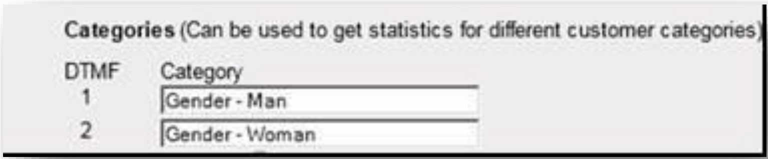
The Survey Configuration is made in Interaction Studio. TE-services are used for distributing a survey call to an Auto Agent and several common service settings are used like:

- Opening schedule
  Ensures that the customer is called at reasonable times
- Outbound A-number
  What number to display
- Retry parameters
  How many attempts should be made to reach the customer
- Skills
  How many Auto Agents should be used

The result questions are the ones that generate the statistic results. For example:
"How would you rate the agent's knowledge concerning your case on a scale from 1-5 where 5 is the highest."



Category questions may be used to check if the result of the survey differs between different customer categories. Three category questions can be configured. For example:
"What does female customers in the age 25-35 think about our service"



The result of the Survey can be viewed in Enterprise Statistics. It is possible to view statistics per agent, service or category.

3.2.10.4 How is it licensed?

1. Outbound Call

One Enterprise Automatic Agent Server License (Art.No. TRIO-P002180) for each Enterprise Core Server.

Enterprise Auto Agent (Art.No. TRIO-P011140)

Enterprise Outbound Call Server License (Art.No. TRIO-P002120)

Interaction Studio Manager License (Art.No. TRIO-P023120)

Enterprise Statistics (Included in Enterprise Core Server License)

2. Survey

One Enterprise Automatic Agent Server License (Art.No. TRIO-P002180) for each Enterprise Core Server.

Enterprise Auto Agent (Art.No. TRIO-P011140) is needed if Outbound Calls is to be made

Interaction Studio Manager License (Art.No. TRIO-P023120)

Enterprise Statistics (Included in the Core Server License)

3.2.11 Enterprise Flex Connection Server License Art.No. TRIO-P002200

3.2.11.1 Customer benefits

The Enterprise Flex Server License will connect the Enghouse Trio Server to a Time card system. Enghouse Trio supports for Esmikko and Timecon protocols. Support for CTR is still available.

Basically the system will create and remove referrals in the Enghouse Trio system when the user leaves and comes in to the office using their key or card. The different systems have different ways for entrance and exit.

The user can with certain systems, sign out using reason codes and enter returning time. This information can be added to the users booking. If no returning time is entered, a default booking will be used.

If the booking should be for information only, or if the user's phone should be diverted, is configured per Flex system.

3.2.11.2 How is it licensed?

One Enterprise Flex Connection Server License per Flex system.

3.2.12 Enterprise Task API Server license Art.No. TRIO-P002210

In an organization, the Contact Center queues are used for prioritization of inbound customer interactions. Many of these customer interactions need automation for better efficiency. Devices out in the field are automatically initiating reports that are handled in backend system. For example a car can report an engine problem or an alarm can be reported by a sensor. These reports are mostly handled in systems that are separate from the contact center. This leads to the fact that the agents need to work in separate systems, the reporting is spread between different system and time reports can be misleading.

The Customer Service will benefit from a centralized prioritization routine that is available in the contact center. The manager or team leader can get an overview of how time is spent by the agents and get status over the cases as well as history of these.

The Enghouse Trio Contact Center API Server license is a way for the external system to integrate with the Contact Center. The external system can create or delete tasks when so needed. Reporting will be available in one central place in Enterprise Statistics. The agents will get a central overview of interactions from customers as well as these automated tasks.

APIs are needed to open for the possibility to obtain necessary information from different systems and on the same way to assign work to the Contact Center agents. It is crucial that a good API is based upon a well-known and accepted technology give easy access to a large number of developers.

Enghouse Trio API are based on web services enabling integration with many commonly used developing languages, offering a good security and scalability without decreasing the performance of the core system.

3.2.12.1 Customer benefits

The CC API opens up the status of the Contact Center and Attendant service. It gives the user possibility to enable integrations of external Wallboards and monitoring different platforms. The CC API is suitable for any external presentation of Contact Center status.

The purpose of the API is to make it available for Contact Center integrations such as:

- In real time, show the current agent/queue situation.

- Follow the status of different cases or tasks

Since the API gives you access to information about the cases that are already in queue you can easily on your website see if a person has already sent an E-mail to the contact center and inform them about their current queue place.

3.2.12.2 How does it work?

Enghouse Interactive will provide a secret customer unique key. This key will be used by the applications using the API.

Specific API users are created in Enghouse Trio by the CD Administrator for authentication. These accounts are used to gather the data from the Contact Center.

These accounts can be controlled by access profiles meaning that the customer can control which services and agents the different instances of the API can display.

The program/application that uses the API has to verify itself with the account created by the CD Administrator. The API is based on webservices using REST, status messages are sent in a JSON-format.

For external internet access a separate DMZ proxyserver is recommended together with encrypted access.

3.2.12.2.1 Tasks

Task is a type of case that can be added to a service. A Task can be:

- Created
- Read status
- Change priority
- Deleted

Upon creation, the task will contain information that is used by the Enghouse Trio routing mechanism to route the task to the best suitable service/queue and agent.

The information given in the task details is visible for the agent both in queue, in the case preview and after accepting the case.

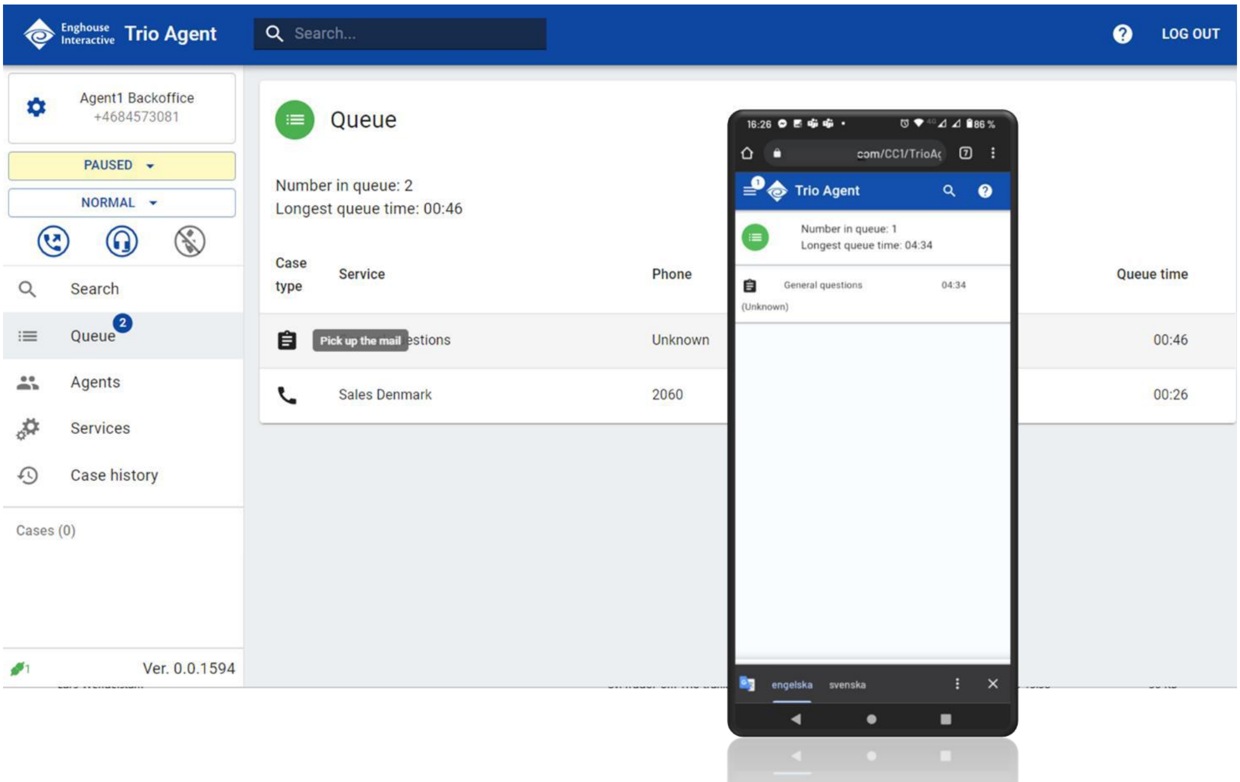
Enghouse Trio supports a large number of standard fields and custom fields can easily be created to handle different types of tasks.

For example on how to use tasks, see below.

3.2.12.3 Sensor example

As an example, we can use sensors that are located around an area and from time to time need service. When these sensors fail or by any other reason require a check-up, they will automatically report issues.

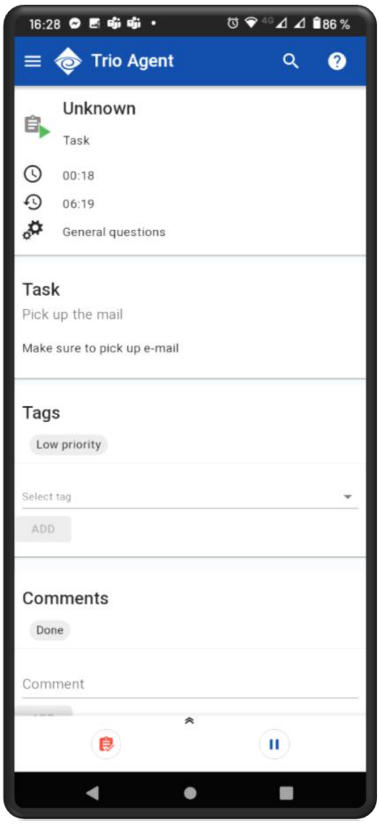
The issues reported are added as tasks to the Enghouse Trio queue using the CC API. Based on the content of or severity in these reports, they can be automatically routed to suitable services/queues and agents.



The agent can accept, comment, add tags and transfer the case to other colleagues; details about these cases are stored for review in Enterprise statistics.

3.2.12.4The view in the Mobile agent/Trio CC application

The same way as the desktop agents can receive tasks it is also available for the Mobile agents using the Trio CC app.



The Tasks are blended with calls; the agent can review the tasks in queue, read the additional information and get some additional help from the coordinates that has been added to the task.

Time spent is logged on the handled task and is available in Enterprise Statistics.

3.2.12.5 Details that can be added

When creating a task parameters can be updated with information. The parameters are for example customer name, automatic tags, and customer parameters that are dynamically created when deploying the Enghouse Trio system.

Description (subject) and body can be filled with text that is be used for analysis and routing based on its contents and will be visible for agents and the dispatcher in the case preview.

A routing category can be set for Enghouse Trio to use as part of the routing mechanism.

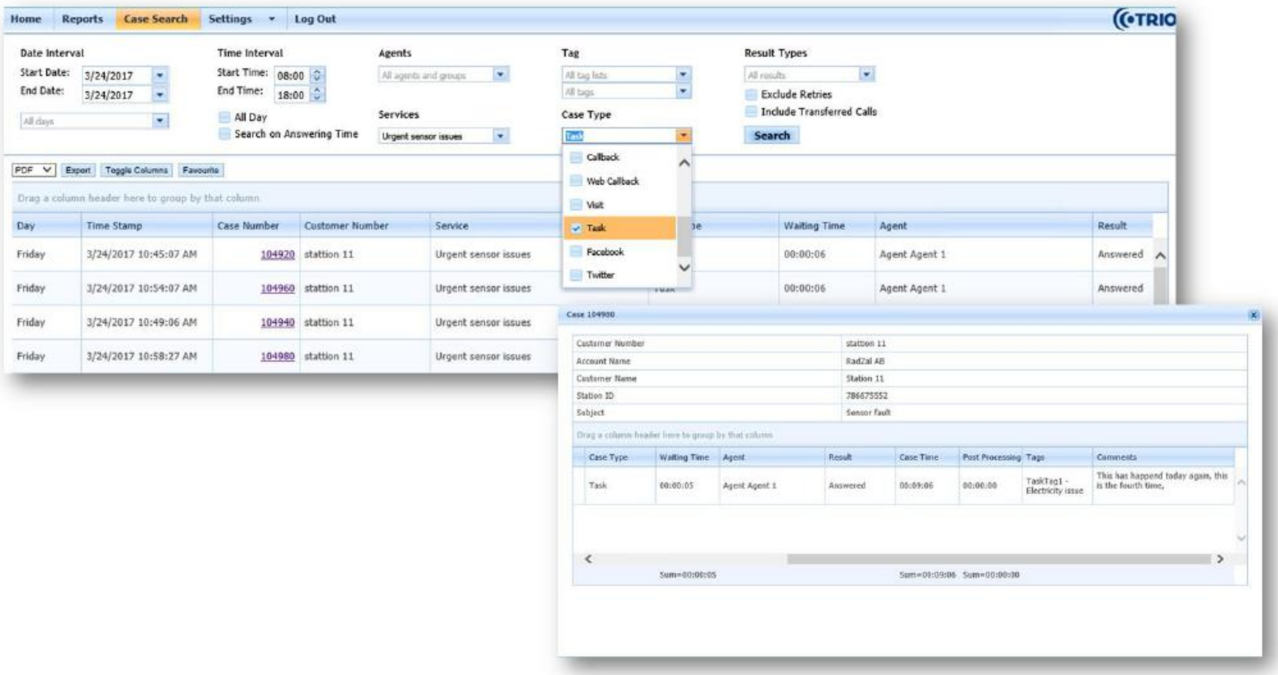
3.2.12.6 Screen popping

When creating the task the external system can add information that is specific for the task. This can be a certain ID or a unique URL. For example can the URL be automatically popped by the Trio Agent client when the agent answers the case.

3.2.12.7 Reporting

The tasks are fully supported by the Enterprise Statistics and have two outcomes, Answered or Hung up (when deleted by the external system).

Custom task reports can be created, tags can be used for filtering and comments added by agents can be reviewed. Similar possibilities as for external interactions also do apply on the tasks.



Example of a case search report for the sensor scenario.

3.2.12.8 Summary

- Tasks are queued based on priority given upon creation or decided by case routing
- Tasks can be previewed by a dispatcher and assigned to best suitable agent
- Handled tasks are visible in the Agent Casehistory
- In Enterprise statistics the tasks are presented with content of the task, queue time and handling time
- Tasks have two outcomes in the statistics, either answered or hung up (deleted).
- Enghouse Trio call data export can also export the information about the tasks so the data can be reviewed for example in a Business Intelligence system.

3.2.12.9 How is it licensed?

One Enterprise Task API Server license, Art.No. TRIO-P002210, Customer gains access to creations of tasks

3.2.13 Enterprise Data Manager Server Art.No. TRIO-P002220

3.2.13.1 Customer benefits

The EU's new General Data Protection Regulation (GDPR) have effect on datahandling The GDPR was designed to protect and empower all EU citizens data privacy. The purpose of the regulation is also to harmonize data privacy laws across Europe and to adapt to todays new technology.

In Enghouse Trio you will have the tools to help you to fulfill the articles in the new regulation. Documents from Enghouse Interactive are not intended to provide professional legal advice. Actions or decisions should not be based solely on the documents, the purpose of the documents is to provide information that should be considered by the user of the system as a personal data controller.

3.2.13.2 How does it work?

3.2.13.2.1 Right to access

Part of the expanded rights of data subjects outlined by the GDPR is the right for data subjects to obtain from the data controller confirmation as to whether or not personal data concerning them is being processed, where and for what purpose.

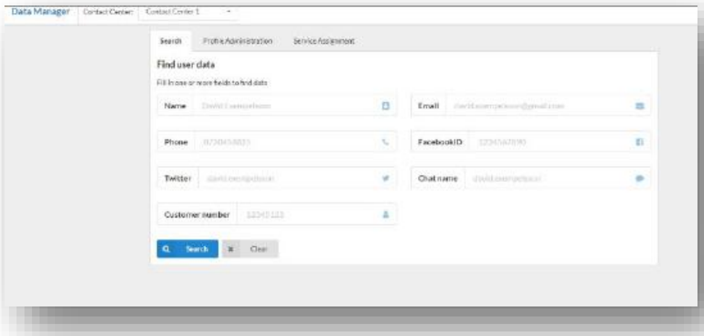
A document will be available with information about what data are stored in the Enghouse Trio system, why (the purpose) it is stored and for how long. The document can be used in order to fulfill the requirement that information about stored personal data has to be given if asked for.

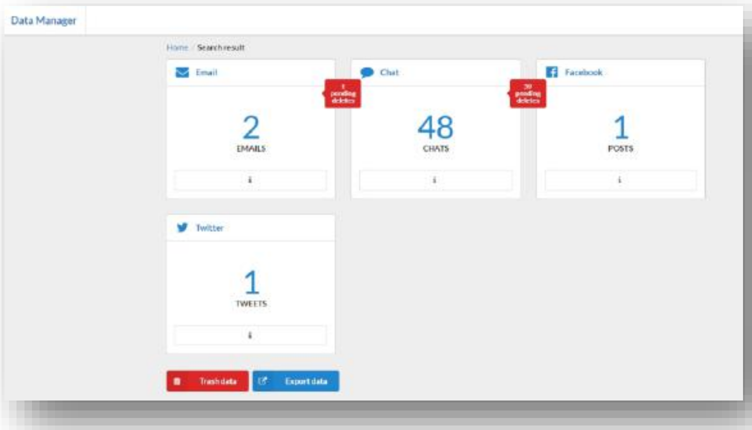
3.2.13.2.2 Dataportability

In Enghouse Trio a web based application for searching after customer data is available. If any customer data is found it is possible to export the data and send it to the person asking for it. GDPR also introduces data portability – the right for a data subject to receive the personal data concerning them, which they have previously provided in a 'commonly use and machine readable format' and have the right to transmit that data to another controller. The export made by the web based application can be used to fulfill this requirement.

3.2.13.2.3 Right to Erasure – Right to be forgotten

The data subject also has the “Right to be forgotten”. This means that if the personal data no longer is necessary in relation to the purposes for which they were collected or otherwise processed or if the person withdraws consents the data has to be deleted. The new application can, after the customer data has been searched for, erase the data. Some data will be totally deleted, for example chat logs, and others will be anonymized in order to still be able to have statistics.



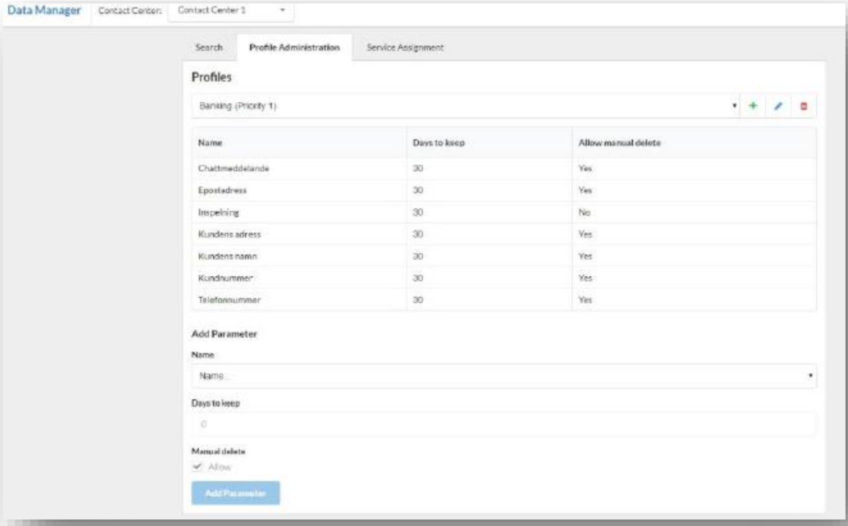


3.2.13.2.4 Profiles

According to GDPR, personal data should be erased when no longer needed. Some personal data have to be stored for legal purposes and others will need a consideration about the balance of interest to store the data or not. Do we have a consent to store the data or does the interest of storing the personal data outweigh the violation of the personal integrity.

In a contact center different services (queues) has different needs when it comes to storing the data. Therefor it is possible to set “profiles” on every service. The profiles are configured based on how long the data will be stored. For example the “Helpdesk” profile will store customer data such as phone number, E-mail address and recordings for 3 months while the “Bank” profile will store the customer data for 5 years. When the profiles are made, every services will be assigned a profile and the personal data will be deleted according to the set up.

The administrator can create, change and delete profiles.



3.2.13.2.5 Recordings from services

Recordings will be deleted according to the profile set on the service. Some customers need to move recordings from the Enghouse Trio server to an archive. In order to delete those recordings they will be “tagged” with the service and the profile. It is also possible to get an export (Call data export) from the database with the recordings and what services they are connected to.

3.2.13.2.6 Voicemail recordings

Voicemail will be deleted after a configurable time. A system mailbox is configured with the time to delete new, saved, read and sent voicemails. The webbased application, Enghouse Trio Data Manager, will be able to search for voicemails but not delete them manually or automatically.

3.2.13.3 How is it licensed?

One license for the Enghouse Trio system. A Enghouse Trio Data Manager needs to have CC + CD + Profile admin rights.

3.2.14 Enterprise Video Server   Art.No. TRIO-P002230

3.2.14.1 Customer benefits

Video in the contact center simplifies everyday life for both customers and contact center agents. In many businesses, video conversation facilitates communication, since you can prove your case faster and easier.

Enghouse Trio gives customers using the product ability to further extend their contact center with Video as a new channel for more personalized customer service.

Video communication is more expressive than voice or text alone, as it allows people to see body language and facial expressions that in most cases will lead to faster and more correct communication.

The visitor can easier explain their matter avoiding misunderstandings.

Enghouse Trio relies on the trusted and widely used Vidyo platform that is operated by Enghouse and offers services to a wide number of customers in a wide number of verticals.

Vidyo is used within financial, heathcare, educational and public sectors to produce a more personal service and communication.

In most caseds the Vidyo platform is embedded to offer the adaptive video solution for best possible quality for the device or situation.

The Enterprise Video server license is the base that enables the system queueing of video cases.

It contains the Vidyo platform integration with necessary licenses to purchase concurrent agents, see *Enterprise Agent Video add-on   (Art.No. TRIO-P012220*)

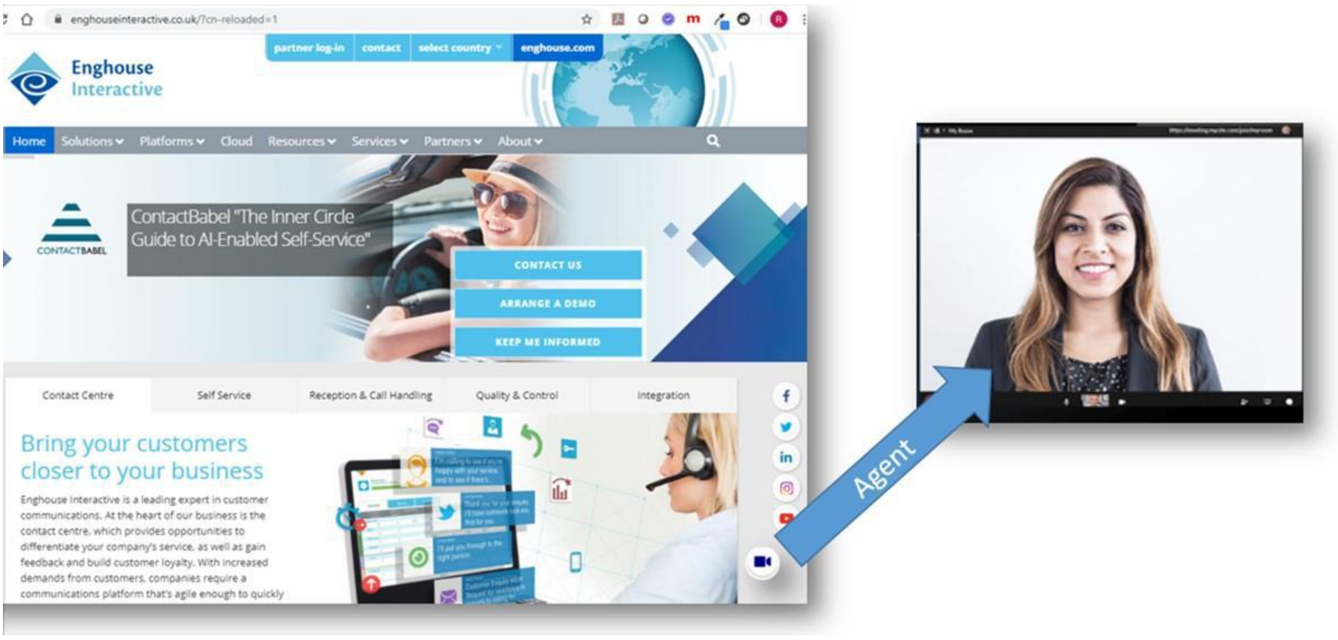
3.2.14.2 How does it work for inbound cases?

As a start certain modules are added to the customer's website, these modules require Enghouse Professional Services or a certified Trio Partner to do the work.

Enghouse Professional Services or a certified Trio Partner adds an adaptable launcher button that will be placed on the customer's website to make it possible to queue video calls in Enghouse Trio, and assign them to agents who are able to handle video cases.

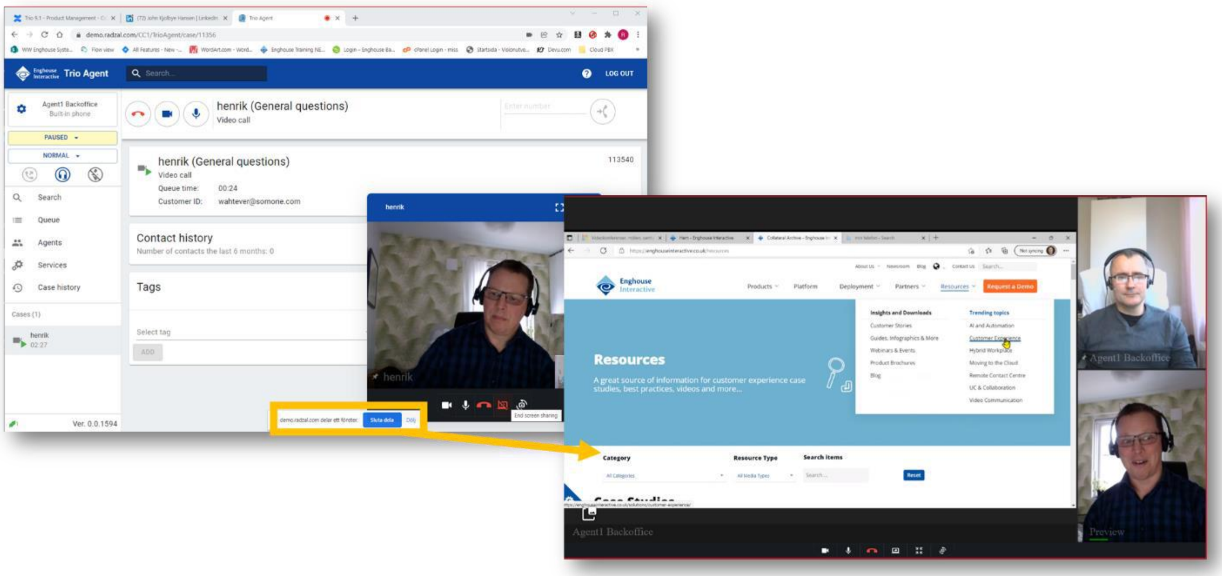
The launcher button can be adapted according to customer wishes in size, colors and text. Trio will provide one default banner that can be used directly or be adapted by PS or a certified Trio Partner.

Both the agent and the visitor will need a device with a camera and a microphone that will be used by their browser.



3.2.14.3Screen and application sharing

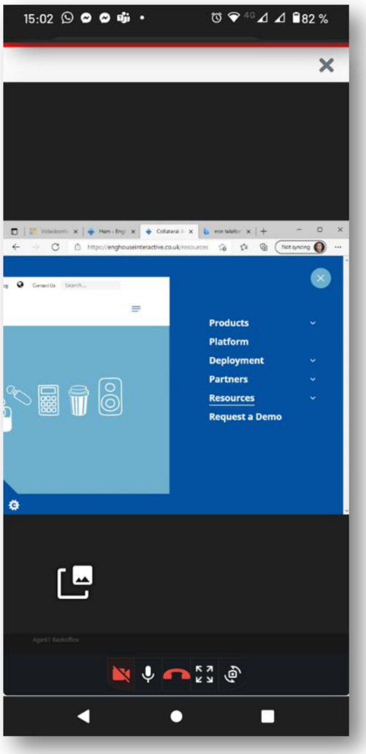
Live collaboration and guidance are important for customers seeking assistance from an agent, the common way is to switch from chat to voice. But that does not always solve the communication problems. With video there is an option to add screen sharing option to any medias, you can escalate a call or chat to video with voice.



Screen and applications can be shared from agent to customer and the other way around, now agent can clearly explain and show documents, videos etc.

This way you will greatly enhance collaboration possibilities for customers and agents using the Vidyo module.

Neither the visitor or agent are limited to special websites or applications meaning that live guidance is available for anything that can be shared from the desktop.



Mobile visitors can not share their smartphone screen, however they can view material that the agents shares with them.

If needed the visitor on mobile will be able to zoom when default view is too small.

3.2.14.4 How does it work for outbound cases?

In many situations both the agent and the visitor wishes to escalate to video from a call or a chat. With Enghouse Trio, Vidyo, and a web connection it is possible. The agent can easily send connection details to the visitor that uses this to open a video session that both will switch to.

Both the agent and the visitor will need a device with a camera and a microphone that will be used by their browser,

3.2.14.4.1 Statistics

Video case is a new case type in the Enghouse Trio system and statistical data about video cases is saved in a similar way as for other case types.

3.2.14.5 How is it deoployed?

- Enghouse Trio is configured to connect to the Enghouse Vidyo cloud service
- Licenses for Trio Agents are added and Agents can after that choose to handle Video cases.
- The video launcher button is added to the customers website and adapted according to the customers web standard by Enghouse Professional Services or a certified Trio Partner
- On the Enghouse Trio server the banner is configured with colours to fit the customers webpage,
    - For visitors a banner provided by Enghouse will be used for initiating video queueing.

- The banner is also configured to either load the video window as part of the customer's webpage or to be popped as a separate browser window.
- A "java script" is added to the code of the customers web site to load the video banner where it has been configured to be displayed.
- Note that manhours are needed to do the work by Enghouse Professional Services or a certified Trio Partner.

3.2.14.6 Technical requirements

- Enghouse Trio server must be able to be contacted over HTTPS directly or through a DMZ server.
- Enghouse Trio Agents must be able to contact the cloud based Vidyo service using https.
- Visitors shall use recommended browsers supporting WebRTC, for example Google Chrome, new Microsoft Edge.

3.2.14.6.1 Limitations

Video in queue is not available

Recording of video calls is not available

3.2.14.7 How is it licensed?

- One license per Enghouse Trio system
    - Agents require:
        - Separate subscriptions for Vidyo services are required per agent
            - Different license is used for different terms, 1 year and 3 year contract
        - One Enterprise Agent Video add-on Art.No. TRIO-P012220 per concurrent Agent that shall be able to handle Vidyo cases

3.3 Enterprise Server Option licenses

3.3.1 Enterprise Line license Art.No. P004110

3.3.1.1 Customer benefits

Enterprise Line License (Call Queuing) is the license required for handling each line from an a SIP Channel Licenses. SIP Channel Licenses are also used with Microsoft Teams GRAPH API and UCMA integrated Microsoft Skype for Business Server. It provides functionality for call handling within the Enghouse Trio system like:

- Playing phrases
- Receiving DTMF
- Recording calls (Skype and SIP)
- Connecting calls

The Line License is used for all the different call applications, like:

- Queuing and connecting calls for Enterprise Server
- IVR-scripting
- Interaction Studio Events
- Enterprise Voice
- Auto Attendant (SIP)
- Self-service IVR applications

3.3.1.2 How is it licensed?

Any Enghouse Trio system should be set up with the maximum number of simultaneous line resources needed at peak hours. The Line License is based on the maximum number of calls the system can handle. To calculate Line Licenses for any Trio system:

- Enterprise Agent Clients uses two lines.
    1. Call trombones through Enghouse Trio system to agent phone set.
- Enghouse Trio Agent Attendant uses six lines.
    1. One ongoing call uses two lines.
    2. Two connected but not answered calls use four lines. These values are estimated, we recommend using this value to calculate the amount of lines required.
- Queuing calls and calls in IVR use one line.
- Enterprise Voice uses Enterprise Line license/ Call Queuing License, one license per handled call.
- Trio Auto Attendant (SIP) uses two lines per active call.
    1. One for inbound call
    2. One for the outbound call.

3.3.1.3 Requirements

- The maximum number of Enterprise SIP/UCMA Channel per Enterprise server is 100 if the Enterprise Server hardware also consists of a Enterprise Line Server License. The capacity is expandable by using additional Enterprise Line Server Licenses. The maximum number of Enterprise SIP/UCMA Channel license per Enterprise Line Server License is 200 or 400 depending on hardware, for more information see the technical requirements.
- With Teams and Graph API based solution the single server can handle a more than 400 lines, please contact presale for review of design

The number of Enterprise Line licenses/ Call Queuing Services should correspond to the sum of channels used.

3.3.2 SIP/UCMA Channels

The SIP/UCMA Channel is used to connect the Enghouse Trio system to a PBX, using a network connection, The Session Initiation Protocol (SIP) is a signalling protocol used for establishing sessions in an IP network. A session enables a two-way telephone call over the IP network. SIP Channel Licenses are also used with UCMA integrated Microsoft Skype for Business server
Note! Speech integrated Microsoft Skype for Business based on UCMA API is considered equal to a SIP Connected PBX, the same is for Microsoft Teams GRAPH API based solution

3.3.3 Enterprise Voice Recorder (included in Enterprise Line License)

3.3.3.1 Customer benefits

Enterprise Voice Recorder enables you to record calls that pass through the Enghouse Trio server, and are serviced by either an agent or an attendant. Recorded calls can be used for:

- legally binding agreements
- as an account of the conversation
- training purposes for new agents
- quality control in the service center
- security measures – tracing recordings to the company or a person to handle threats and unpleasant calls, etc

The trainer or supervisor can evaluate the quality of the call, or review the call together with the agent.
Enghouse Trio uses market standards, such as MP3, for the recordings and Microsoft Office for recording retrieval.
Enterprise Voice Recorder Line License can be used for calls to a service, or direct calls to an extension, when using personal queue. Enghouse Trio free seating enables you to take advantage of Voice Recording no matter what phone you are using, as long as you are taking calls through the Enghouse Trio system.
With Enterprise Voice Recorder's unique buffering system you can record the entire conversation, even if you activate recording manually halfway through the conversation. This could also be done automatically by the Enterprise system
The buold in recording can be replaced with Enghouse Quiality Management Suite giving increased compliance with regulations set for finance and other sectors

3.3.3.2 Special consideration

When using the recording function you are responsible for setting up the system according to the laws and regulations in your country.
If using recording as a proof of an agreement, then you should check the legal validity of phone recordings in your country and profession.

Pease Note! **Enterprise Voice Recorder is not supported with Microsoft Teams and Graph API based solution, for recordning Enghouse Quality Management shall be used.**

3.3.3.3 Concent for redording

In order to protect personal data and privacy, there has been an increasing demand of handling consent for recording of calls.
Recording systems has, up till now, been configured to meet the need of the recipient service, not the caller.

It is possible to set a consent/no consent of recording for the specific call, which will supersede any other recoding setting, regardless of how the call is forwarded between agents and services in the contact center. The customer can add a new option when creating an IVR in Interaction Studio to ask for consent for call recording.

This way if a caller decides that the call shall never be recorded this setting will override any settings in queues or on agents.
As shown the option can also be used to force recording of a call.
This feature works both with Trio Recording and if Agent recording is managed by Quaility Management Suite.

3.3.3.4 How is it licensed?

One license is issued per Enterprise Line License

3.3.3.5 Requirements

- Enterprise Recording Browser is required for searching and retrieving recordings.
- Separate disk for recorder files is needed, by default Trio recommends that disk shall be named E:

3.3.3.6 How does it work?

The voice channel is routed through the Enghouse Trio system. When a call is recorded this will be indicated by a recording icon.

- The recordings is stored in MP3 format
- Recording is done in stereo (two channels), where one channel is the agent and the other the caller
- Recording is initially stored on the local HD, but can then be moved to a network disk or common server.
- Recording requires 10Mb per hour of recording
- Recording is stored up to a configurable threshold size. The oldest recordings are then removed. A setting can be made to not remove the files, unless the “archive” attribute is set (by a backup application). In this case it can send warnings to selected users.
- If one wishes to store the recorded files for several years, a long time backup is needed. This is the responsibility of the company or organisation.
- Recordings can be searched and retrieved using the Recorder Browser.
- An agent can also listen to his/her own calls from the Casehistory. These recordings are available directly after the call is finished.

Recording can be configured per service in the following ways:

- Do not allow recording al all,
- Record every call
- Record every X call (where X is configurable)
- Buffered recording – records every call, but stores the recording only if the agent selects the record button or key The whole conversation will be recorded – also the beginning of the call.
- If the agents are allowed to stop and start recording
- If the agents are allowed to save and/or delete recordings

These parameters apply both to incoming and outgoing calls.
Recording can also be configured per agent

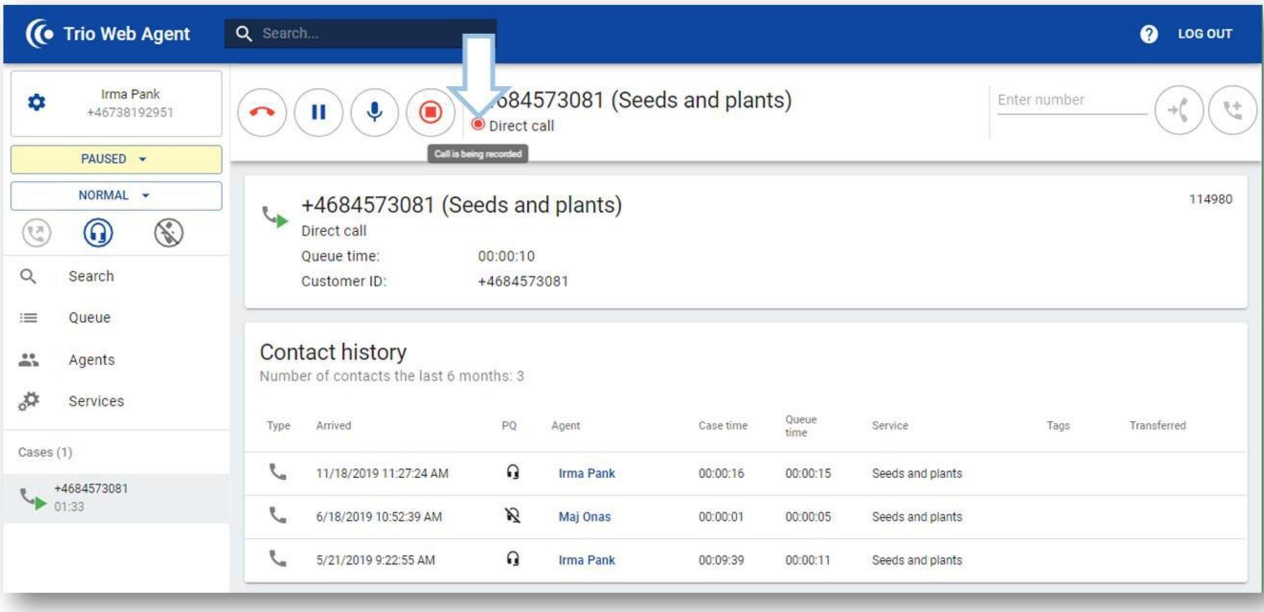
- Do not allow recording al all, a
- Records every call
    - This requires that the Agent has a Personal Queue and recording is active, this overrides the service settings.
- The recording parameter is configured in the personal queue settings for the agent/attendant.
- The recording parameter applies to:
  - Incoming calls to the agent's personal queue
  - Outgoing spontaneous calls using the client. (Enterprise Agent Client only)
  - Calls transferred from other agents to this agent.

Note that spontaneous outgoing calls directly from the phone set will not be handled by Enghouse Trio, and will not be recorded.

Recording can also be manually initiated by the Agent

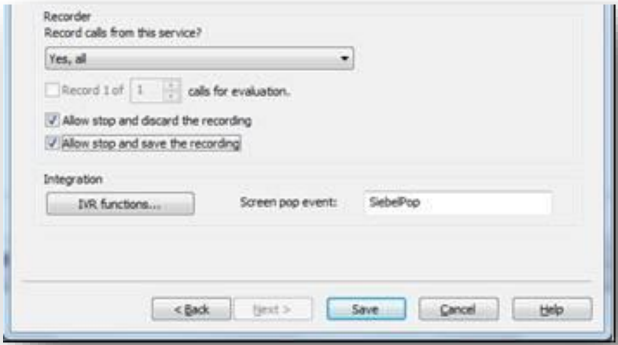
- Manually start recording – when the agents selects the record button or key.

3.3.3.7 How does it work for the Enterprise Agent /Attendant client?

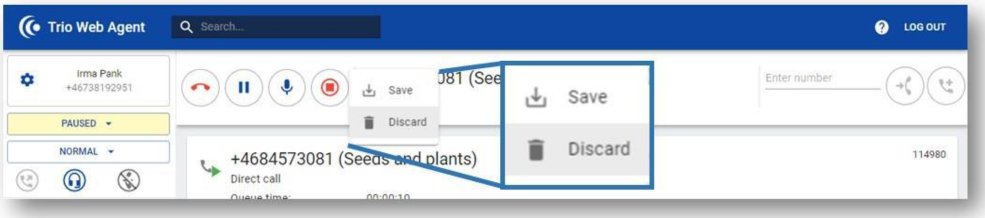


View in Trio Agent Web

If the Agent has a recording option, an icon will indicate that recording is in progress. The Agent can choose to start the recording manually by clicking on the recording button on the toolbar. An administrator can configure if the agents are allowed to start, stop and delete a recording.

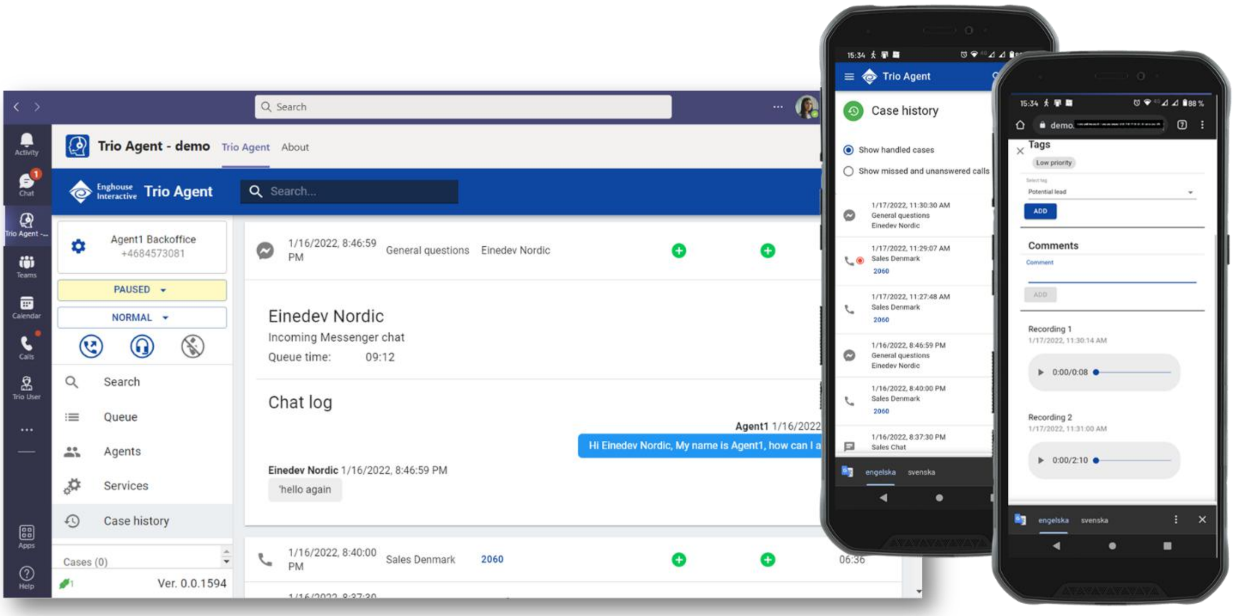


The choices to stop a recording in Trio Agent Web (if available)



The ability for the agents to start and stop a recording is useful in many cases. Sometimes a customer do not agree that the call will be recorded, sometimes an agent only wants to record a part of the conversation or the opposite, that an agent wants to skip to record a part of the conversation.

When using the Enterprise Agent Attendant Client you have access to the Casehistory. From this log you can easily access your latest recordings. A recording icon identifies the calls that are recorded by the call in the case list. From this list you can select the call and select Play, by right-clicking on the call.



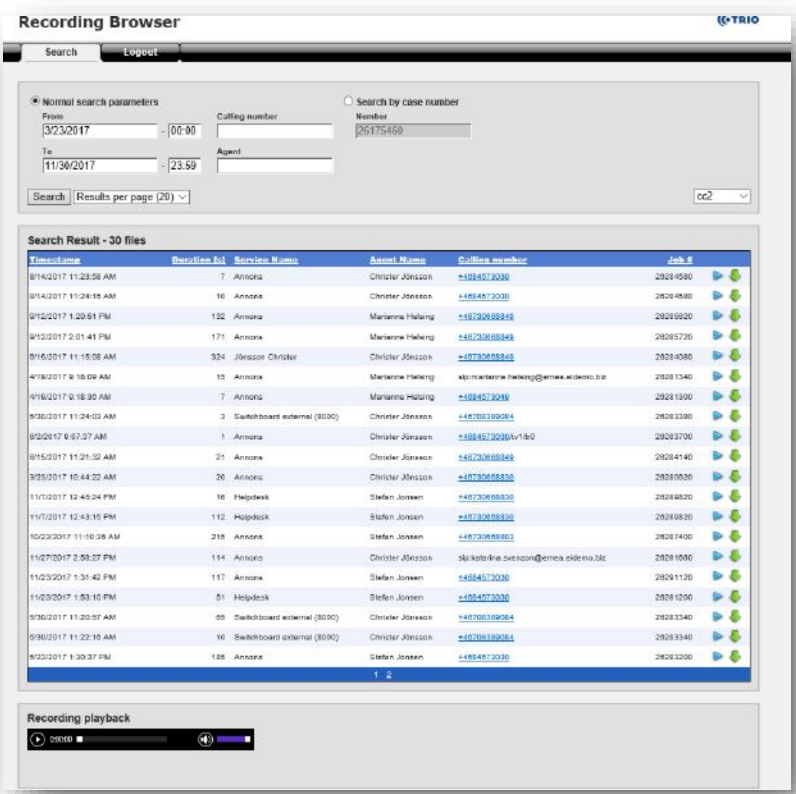
Recording menu – IVR function

There is also the possibility to use a recording menu to get recording from any phone at any time. Call the menu and you will be asked to enter the phone number you want to dial; Enghouse Trio dials the number for you and records the call. This can be useful, for example when a real-estate broker collects bids from different customers for a house or an apartment.

Search and retrieve recordings

Enterprise Recording Browser

The Enterprise Recording Browser gives the users the possibility to access the recordings using a web based interface.



Here the administrator can decide whose recorded calls the user can listen to, the options are:

- None (no access),
- Own (only calls handled by the agent),
- Group (allowed to search calls handled by all the same agent group) and
- All (maximum authority).

The rights are set in the Trio Administrator program in the Agent tab.

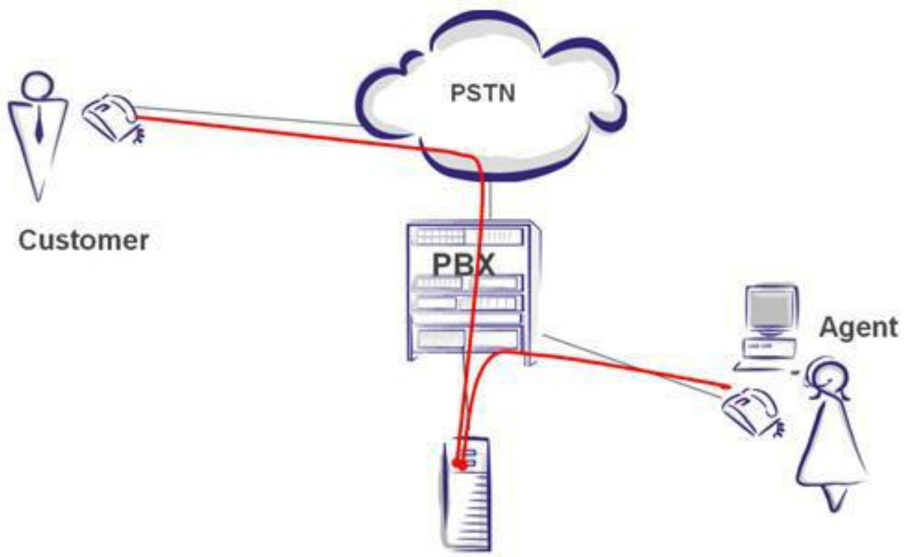
This greatly enhances security in the system giving the users the possibility to access files and download these from any PC attached to the system.
The user can search for recorded calls based on following:

- A time period specified as date and time
- The number of the caller
- Agent name or ID

To playback a recorded call the PC speakers are used, the user may also download the call as a MP3 file.

Logging on Agent Recording Browser
The Enteprise Recording Browser uses Single-sign-on when logging in.
Storing and backup of the recordings
The recorded calls are initially stored on the local HD but can then be copied to a network disk or common server (this is advisable when having several line interface servers). How long the recordings should be saved locally is indicated in the configuration by setting a maximum size of the recording directory. The customer's central backup system should be configured to back up the folder where the recordings are stored.

3.3.3.8 How is the solution implemented?



Each call, inbound or outbound, must be bridged through the Enghouse Trio server. Enghouse Trio server is connected to the using SIP. For more information, investigate the line license chapter. Trio can connect one or several trunks, and connect to one or several PBX's / locations.
The agent can use any phone, even a mobile phone or a home phone.

- The Agent and Enterprise Attendant Client supports recording of both inbound and outbound calls
- The Enterprise Agent Phone Client supports recording of inbound calls based on the settings for the service where the call originated. Outbound calls are supported by the recording menu that is available as a destination defined in Enghouse Trio. Agent dials the destination and specifies the number that shall be called; the call is 91ialled91 through the Enghouse Trio and is recorded.
- Enterprise Mobile Agent – Web agent has the same functionality as Enterprise Agent Phone Client
- Enterprise Mobile Agent – Trio CC APP supports recording of inbound calls based on the settings for the service where the call originated.

3.3.4 Additional Presence Connection to a PBX Art.No. P004140

3.3.4.1 Customer benefits

The presence connection is used to connect to the phone switch (PBX). This connection is used to control phones and set presence. When a user has entered a new presence event, in any of the Enghouse Trio modules, Trio will forward the phone to the voice service or to the attendant during the period the user is unavailable or absent.

- Presence Event
  - Information about where you are, and when you will be back
  - The presence event status is usually: lunch, meeting, vacation, sick, business travel, gone home for the day
- Administrates presence events
  - Automatically from your calendar, using Assistant for Calendar
  - Attendant
  - Automated voice services
    - Call in to Auto Attendant and say "meeting until 15:00"
- Schedules presence events
  - for example, you are working 90% and are away every Friday
- Forwarding
  - It is possible to create or schedule forwarding, the extension will be closed and the calls are forwarded to Enghouse Trio where the system will call the destination specified by the user.
  - Forwarding can be made with DTMF tones or through the Trio User or the Enterprise Agent Attendant Client.

When the presence event is active, the calls are automatically forwarded to

- Enterprise Voice
- Attendant.
- Voice Mail
- Other destination configured by user

3.3.4.2 How is it licensed?

One license per phone switch (PBX) that the system is connected to. One license is included in the Enghouse Trio server license. You only need additional licenses when you connect two or more PBXs to the Enghouse Trio server.

3.3.5 Additional Call Center Server License Art.No. P004150

3.3.5.1 Customer benefits

It is possible to install several Call Centers onto one single server. These work completely separated from the other, sharing only the common line resources and connection to the PBX
Every Contact Center has:

- Server applications, statistics
- One Trio Administrator Clients
  - Basic functionality: Administrates queue messages, scheduling for work hours, competence, agent (create, edit and delete), skill settings, role definition, prioritising of queues, and setting up of groups.

3.3.5.2 How is it licensed?

- One license per additional Call Center is needed.
- Enterprise Agent Phone Client, Enterprise Mobile Agent client and Enterprise Agent with its options needs to be purchased per Call Center.

Modules that are licensed per Call Center needs also be purchased separately. The installation program handles up to 10 Call Centers on the same server.
(More Call Centers can be added as a customization)

3.4 Enterprise system Optional licenses

3.4.1 Enterprise Call Data Export Art.No. P005110

The Enterprise Call Data export module is used to export the Agent/Attendant statistics daily. This data can be picked up, for example, by a billing system.
For example, the data contains call start time, when the call was answered, information about the case of redirection, e.g. to switchboard, and many other details.
The export will each day create a number of text files. All text file name ends with the date for the statistics in the file using the format YYYY-MM-DD.txt (Ex. Taexp_srv_2020-10-02.txt). The files contain the data in the corresponding database tables in the Enghouse Trio Contact Center database.

3.4.1.1 How is it licensed?

It is licensed per Enterprise Core Server.

3.4.1.2 Special consideration Call data Export

From the beginning the export was adapted for PRO and not Calabrio TeleoptiCCC (Work Force Management). For integration with Teleopti CCC see Enterprise Connection to Teleopti WorkForce Management (P005140). There is detailed documentation available about the format of the statistics that easily could be adapted by other billing system manufacturers.
Export of customer data such as names and numbers in the Enterprise Directory database are not included in this license.

3.4.2 Enterprise Real Time Statistics Monitor Art.No. P005130

3.4.2.1 Customer benefits

The Queue status monitor is a program that provides real-time service status, displayed on a big screen monitor. This is used in Contact Center or switchboard environments were all agents and attendants can see the monitor, and follow the service status for the different services. Similar information can be shown in the Enterprise Agent Client, but sometimes the space on the agent's desktop is limited.

3.4.2.2 How is it licensed?

The Enterprise Queue Status Monitor is licensed per monitor. If customer wants more than 10 monitors, please contact Enghouse Trio Presale

3.4.2.3 Requirements

- Customer shall provide PC and Display Device

3.4.2.4 How does it work?

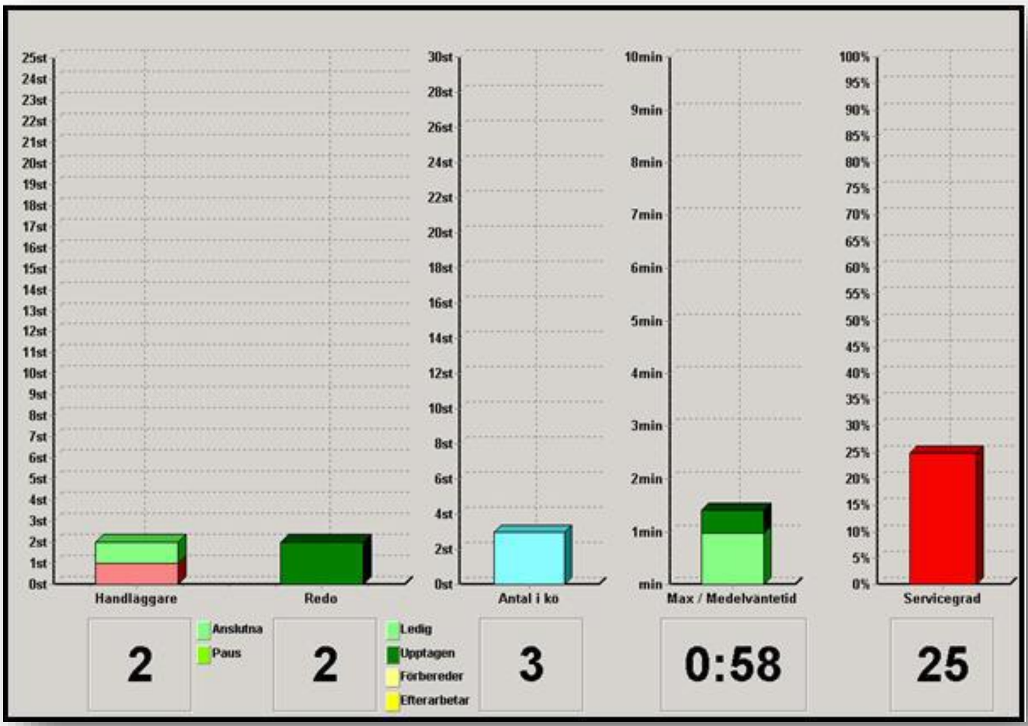
It fetches real time information directly from the queue engine. The information displayed on the monitor is configurable and can be shown from different views. One can also select to show different services, either as a total, or separately for individual services or groups of services.
It can show current status such as:

- Number of cases in queue
- Number of agents logged in, paused, ready, etc
- Average and maximum waiting time.

- Service level

It can also show statistics accumulated for the current day as values or graphs.
For example:

- Answered, lost and refused cases
- Service level
- Waiting times



3.4.3 Enterprise Connection to Calabrio - Teleopti Workforce Managemen Art.No. P005140

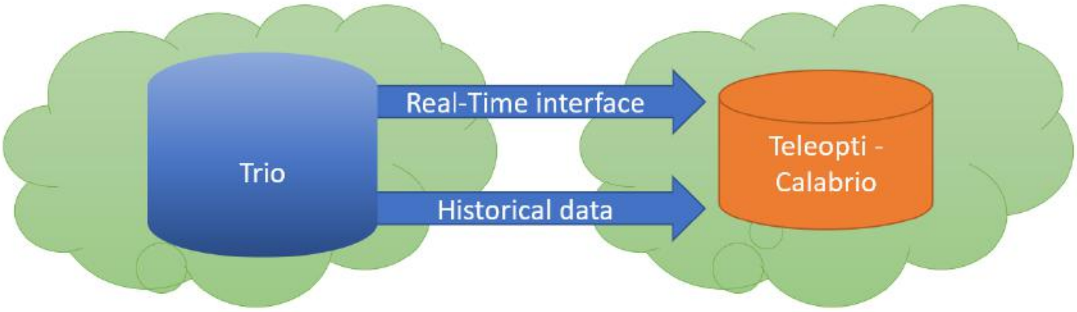
3.4.3.1 Customer benefits

Customers that use Calabrio Teleopti Workforce Management to plan and schedule the staffing of their contact center can with this module integrate Enghouse Trio with their current solution.
Enghouse Trio is able to almost in realtime updateCalabrio/Teleopti with data that can be used to simulate and plan for the load on the contact center. This is done by integrating with Calabio – Teleopti RTA interface (for more information please contact Calabrio)

3.4.3.2 How is the solution implemented?

This module will provide Teleopti CCC with statistical data from Enghouse Trio in intervals. Default the export will deliver data once a day but can be set to a 15 minute interval.

The information will be stored in a Microsoft SQL database that is monitored by the Calabrio Teleopti system that is used to present the data.



The solution in Trio reports on time spent on calls.

3.4.3.3 Calabrio Teleopti real time reporting

In Enghouse Trio 9.0 the integration has been expanded with a more real-time reporting ability, this way the coach or supervisor can react on unplanned changes, for example agents logging off or pausing when these are scheduled to service certain queues.

3.4.3.3.1 Limit the data Trio sends over to Calabrio RTA interface

Too many events can make it tricker for Calabrio to calculate the prognosis and the forecast, therefore the realtime data can be set to update Calabrio once every 20 seconds or more.

3.4.3.4 How is it licensed?

It is licensed per Enterprise Server
This real-time reporting is part of the Teleopti WFM integration license.

3.4.4 Enterprise Connection to Kalix Tele 24 Art.No. P005150

3.4.4.1 How does it work?

The integration between a Enghouse Trio system, located at the customer premise, and the service bureau KalixTele24 consists of two parts.

One part is that KalixTele24 uses an API provided by the TE system to get information about the users in the TE system and update information about referrals in the TE system.

The other part is the call handling part, i.e. calls that for some reason are not handled in the TE system at the customer premise should be transferred to KalixTele24. Calls that should be transferred to KalixTele24 are transferred using a technique with a prefix. This requires that when the TE system starts a call towards the PBX at the customer premise and the called number begins with the specified prefix, the call should be routed to KalixTele24.

3.4.4.2 How is it licensed?

It is licensed per Enterprise Server.

3.4.4.3 Special Considerations

If a customer wants a Kalix Tele 24 integration the Trio Partner has to buy Enterprise Connection to Kalix Tele 24 and have a contract with Kalix Tele 24. The latter contract has to be handled by Trio partner.

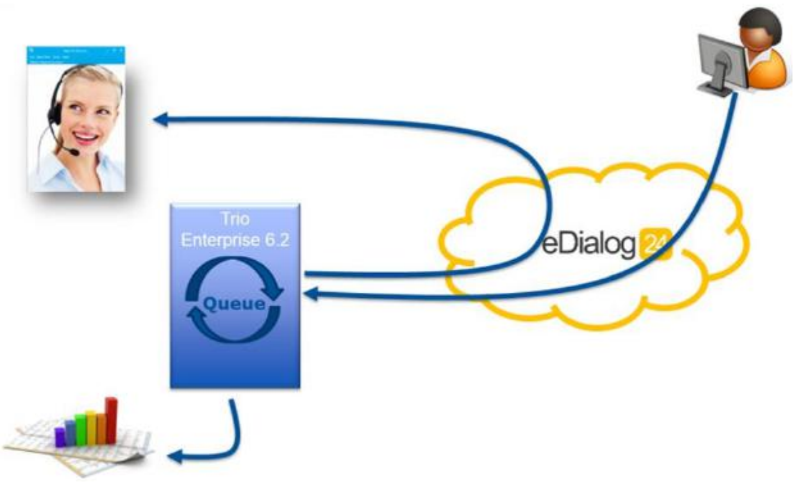
3.4.5 Enterprise Connection to eDialog24 Art.No. TRIO-P005180

3.4.5.1 Customer benefits

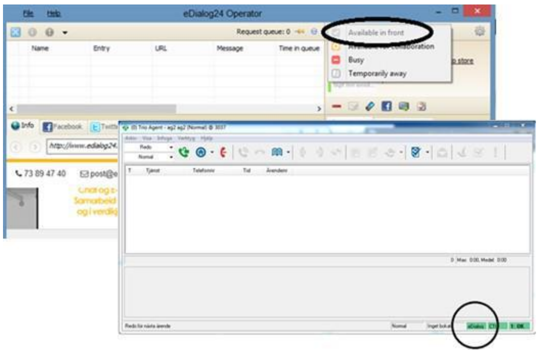
eDialog 24 is a supplier for advanced chat with features such as chat and FAQ's. In Enghouse Trio the eDialog24 chat conversations can be queued in Enghouse Trio and distributed among Enghouse Trio agents. This will give the agents an advanced chat and the possibility to get the chat in the same application such as calls, e-mails etc, giving them the possibility to blend different kind of cases.

3.4.5.2 How does it work?

The agent has to login both to the eDialog24 agent client and the Enghouse Trio client. The eDialog24 client has to be installed on the agents PC. The chats will be sent from eDialog24 to Enghouse Trio where they will be queued and distributed to agents with the right competence. The agent can answer and hung up the chat in Enghouse Trio and in eDialog24. It is possible to transfer chat to another service or agent using the eDialog24 client. The case time on each chat will be logged in the Enterprise Statistics.



Enghouse Trio will have information about number of chat sessions, details about lost chats, queue times and time spent on these in the statistics.
In a case when the customer needs to retrieve information about the conversation they will find it in eDialog24.
When Trio Agent and the eDialog24 agent are started the connection is indicated at the bottom right line of the Trio Agent.



The Trio Agent state effects the state of the eDialog state, meaning that a Trio Agent in pause and ready mode will lead to online in eDialog24. The eDialog24 status will be offline when the Trio Agent logs off or switches to a role where the chat queue will be unstaffed.
The customer that are on the Enghouse Trio customer's website will be notified if there is available agents or not in eDialog24.

3.4.5.2.1 Features

The integration offers the following possibilities:

- Integration of Agent states between eDialog24 and Enghouse Trio.
- Queueing of eDialog24 chat cases in the Enghouse Trio queue.
- Distribution between agents based on skill and role following the Trio queue.
- The case can be ended in either the eDialog24 or Trio Agent client.
- The Agent can handle multiple eDialog24 chat sessions on the same time.
- The Agent can switch between call and chat by automatic parking.
- Using the eDialog24 client the Agent can transfer chat to other agents and services.

3.4.5.3 How is it licensed?

It is licensed per Enterprise Server and CC. Every CC needs its own account at eDialog24.

- Enterprise Agent/Attendant Client (Art.No. P011210)

3.4.5.4 Special Considerations

A Enghouse Trio system running an eDialog24 Connection cannot use the Trio Web Communication Advanced chat client (Art.No. TRIO-P041115). An agent and/or service can not mix eDialog24 chat and Enghouse Trio chat (Art.No. TRIO-P002130).

The Enghouse Trio contains of four different chat programs. Below is a chart if how these chat programs can be run in the same Enghouse Trio server.

	Trio Chat	SFB	Web Comm.	eDialog24
eDialog	Not same service/agent	OK	NO	-

3.4.6 Enterprise Connection to Microsoft Dynamics Art.No. TRIO-P005190

3.4.6.1 Customer benefits

A standardized way to connect to Microsoft Dynamics and to retrieve data and add data to Microsoft Dynamics is included in Enghouse Trio. The Enterprise Connection to Microsoft Dynamics supports Microsoft Dynamics CRM 2016 (on prem) and Microsoft Dynamics 365 (Cloud)

3.4.6.2 How is it licensed?

Licenced per Connection to a Microsoft Dynamics system.

3.4.6.3 Considerations

It is possible to use several different CRM systems with Enghouse Trior, however only one CRM system can be used per number if no IVR menu is used. IVR menus open up for routing to different queues and lookup in different CRM systems.

3.4.6.4 Requirements

- Enterprise Agent/ Attendant Client (Art.No. TRIO-P011210)

3.4.6.5 How does it work?

The integration provides a mechanism for fetching and storing information in the CRM system. Enghouse Trio gathers information from the CRM system and there is also a possibility for Enghouse Trio to add Contact Center information to The CRM system.

- Possibilities to assign cases to the agents that have a “relation” to the identified contact
- Use customer data for routing. Route calls to correct departments based on identified customer e-mail address, phone number etc.
- Automatically bring up details of the customer based on e-mail address, phone number etc to agents upon answer or in preparation time
- Easily make new calls based on CRM system details, (click 2 call)
- Automatically update of contact notes based on activity in the contact center with name of agent, tags, comments, call length, wait time etc

3.4.6.5.1 Identify customers

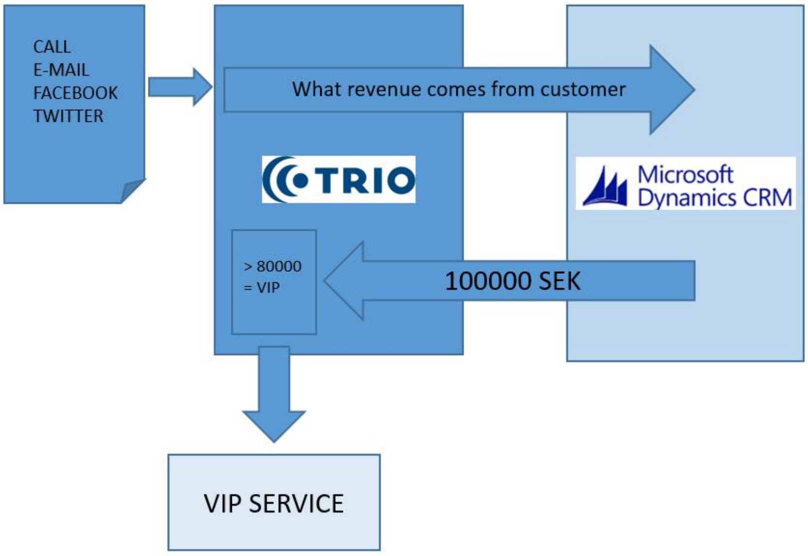
The incoming customer cases can be identified by matching customer information (for instance Caller ID, e-mail address, Facebook ID, Twitter ID, IVR prompted information such as Customer ID) with Customer data found in the CRM system. The integration supports fetching Customer attributes from the CRM system into the Routing engine of Enghouse Trio.

In Microsoft Dynamics separate entrances can be used for Customer Support and Sales and marketing where the first match is made on case id for Customer Support and caller data for Sales and marketing entrances.

All management is using standardized Interaction Studio functionality.

3.4.6.5.2 Route the customer

Customer attributes found in the CRM system can then be used by the routing services in the Contact Center so that the Customer is automatically routed to the appropriate competence team. Customer CRM attributes could be information on VIP status, customer location etc.

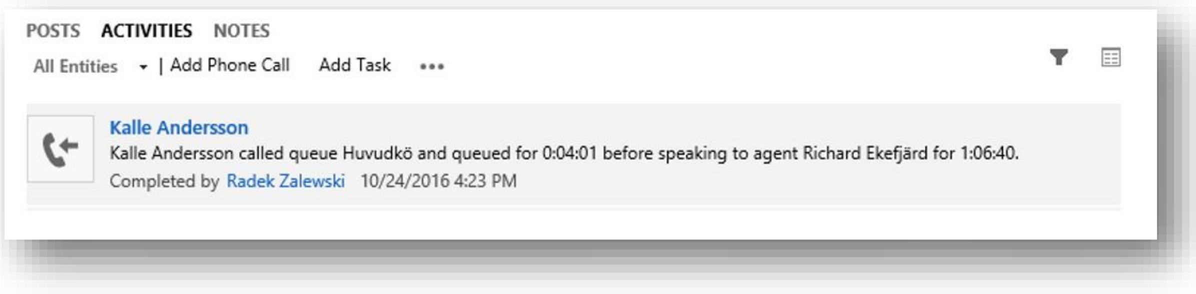


3.4.6.5.3 Update Dynamics CRM Activity log

The integration provides mechanism for fetching and storing information in the Dynamics CRM system activity log.

For example, Enghouse Trio can add activity notes to contacts and to accounts handled by the Contact Center including call/case details such as name of queue, customer wait time in queue, serving Agents name and how long they interacted. Additionally, Trio can add information about calls/cases that were not answered, meaning when the call was hang up before any agent responded. This information can be especially important for a CRM Account Manager who plan to contact the customer, knowing the Contact Center performance for that specific customer might change how the account manager approaches the call.

This also means that the Dynamics CRM will be updated regardless of if the agent is using Dynamics or not.



Flexible templates can be created for Answered calls, not answered calls and text based cases such as Twitter, Mail and Facebook.

3.4.6.5.4 Reduce call handling times

The Agent is served with customer information through automatic screen pops of the CRM system. It will automatically bring up details of the customer.

Some of the information gathered from the CRM system can be made available in queue preview so that the agents can manually define the importance of cases.

3.4.6.5.5 Multiple CRM systems

It is possible to use several different CRM systems with Enghouse Trior, however only one CRM system can be used per number if no IVR menu is used. IVR menus open up for routing to different queues and lookup in different CRM systems.

3.4.6.5.6 Attendant queues

In some cases CRM pop is not needed, for example the attendant will not use the CRM system when working. The solution matches all inbound cases with the CRM and the Customer will then define per queue if CRM pop shall or shall not be active. This way the Attendant queues can match the inbound cases and quickly transfer the cases to the Contact Center queues that will have CRM popup active.

3.4.7 Enterprise Chatbot Connection Art.No. TRIO-P005200

3.4.7.1 Customer benefits

The demand for chatbots in the contact center increases, enabling self-service and faster resolutions. Human agents need to be relieved today, when increasing number of visitors are turning to chat for quicker assistance with any type of question. Visitors do no longer spend time to browse websites or FAQs, they turn to chat to get the information faster, more precisely and they accept automation if it is correct and available at any time.

We shall not forget that it is important, when adding automation we shall be prepared for seamless transfer to humans when needed, and catch the visitor as soon as there is a risk for confusion or misunderstanding. This creates a superior customer experience.

Enghouse Trio 9 allows you to create your own chatbot to relieve human workforce with digital. When needed the process can escalate and transfer seamlessly to human workforce.

3.4.7.2 How does it work?

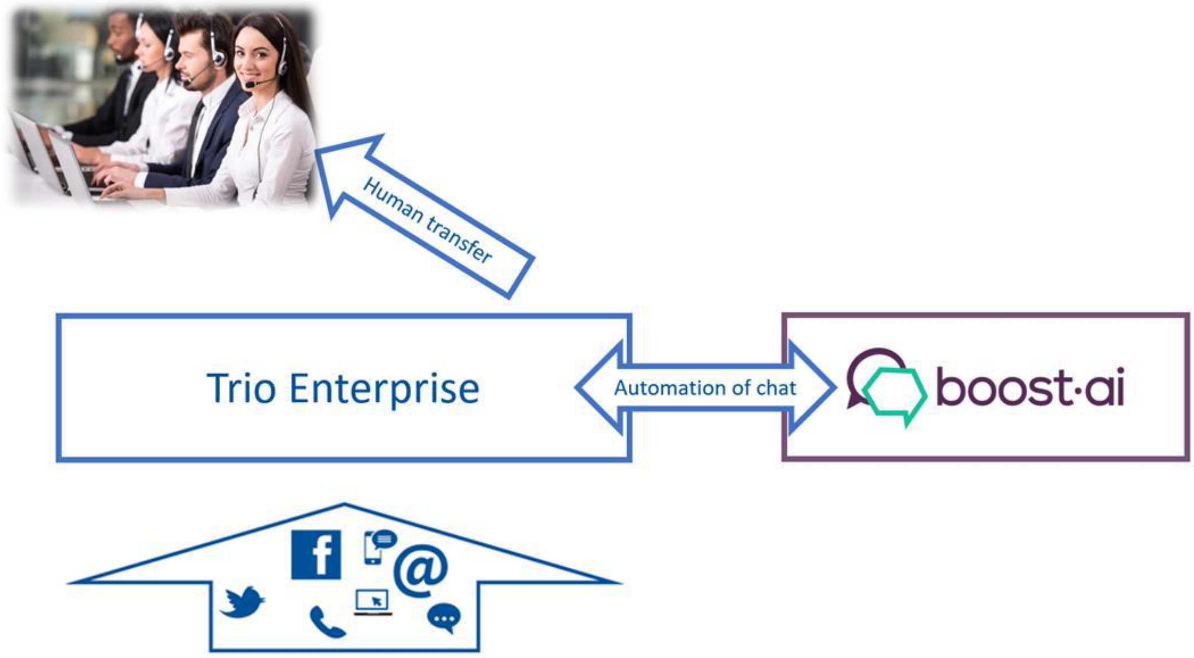
With Enghouse Trio 9 customers can integrate automatic chat. As a start we collaborate with boost.ai for the possibility to run a chatbot integrated in the Trio Chat, and using Enghouse Trio for seamless human transfer.

There is a number of benefits to integrate Trio Chat with boost.ai

Conversation history from the visitor's chat with the chatbot is available to the agent that the chat is escalated to.

Since the whole conversation is going through Enghouse Trio the conversation is available in Enghouse Trio Statistics next to any other medias that were used to communicate with a certain visitor or customer.

Using the Enghouse Trio Data manager rules for data retention can be set so they match the rules defined for the queues, normally the type of conversation.



The reason Enghouse Trio is integrated with boost.ai, is for customers to use their current contact center experts to be able to train and maintain the boost.ai bot, using the easy interface. The best persons to make sure the chatbot is handling the cases correctly are the agents.

Note that the maximum number of characters in a boost chat is limited to 110 characters.

3.4.7.3 How is it licensed?

It is licensed per Enterprise Core server and CC. Every CC needs its own account for boost.ai.

3.4.8 Enterprise Connection to Vergic Art.No. TRIO-P005210

3.4.8.1 Customer benefits

Vergic is a supplier for advanced chat with features such as chat and analytics. In Enghouse Trio the Vergic chat conversations can be queued in Enghouse Trio and distributed among Enghouse Trio agents. This will give the agents an advanced chat and the possibility to get the chat in the same application such as calls, e-mails etc, giving them the possibility to blend different kind of cases.
Note that this article is not for the bundled Trio Web Communication offering but for customers that obtain the Vergic licenses separately.

3.4.8.2 How does it work?

The agent logs in both to the Vergic agent client and the Enghouse Trio client. The chats will be sent from Vergic to Enghouse Trio where they will be queued and distributed to agents with the right competence. The agent can answer the chat in Enghouse Trio. It is possible to transfer chat to another queue using the Vergic client. The case time on chat will be logged in the Enterprise Statistics.

Enghouse Trio will have information about number of chat sessions, details about lost chats, queue times and time spent on these in the statistics.
In a case when the customer needs to retrieve information about the conversation they will find it in Enghouse Trio

3.4.8.2.1 Features

The integration offers the following possibilities:

- Queueing of Vergic chat cases in the Enghouse Trio queue.
- Distribution between agents based on skill and role following the Trio queue.
- The Agent can handle multiple Vergic chat sessions on the same time.
- The Agent can switch between call and chat by automatic parking.
- Using the Vergic client the Agent can transfer chat to other agents and services.

3.4.8.3 How is it licensed?

It is licensed per Enterprise Server and CC. Every CC needs its own account at to Vergic.

- Enterprise Agent/Attendant Client (Art.No. P011210)

3.4.8.4 Special Considerations

A Enghouse Trio system running an Vergic Connection cannot use the Trio Web Communication An agent and/or service can not mix Vergic chat and Enghouse Trio chat

The Enghouse Trio contains of four different chat programs. Below is a chart if how these chat programs can be run in the same Enghouse Trio server.

	Trio Chat	SFB	Web Comm.	eDialog24
Vergic	Not same service/agent	OK	NO	NO

3.5 Enterprise Server Failover Licenses

3.5.1 Enterprise automatic Core Server failover Option Art.No. P006110

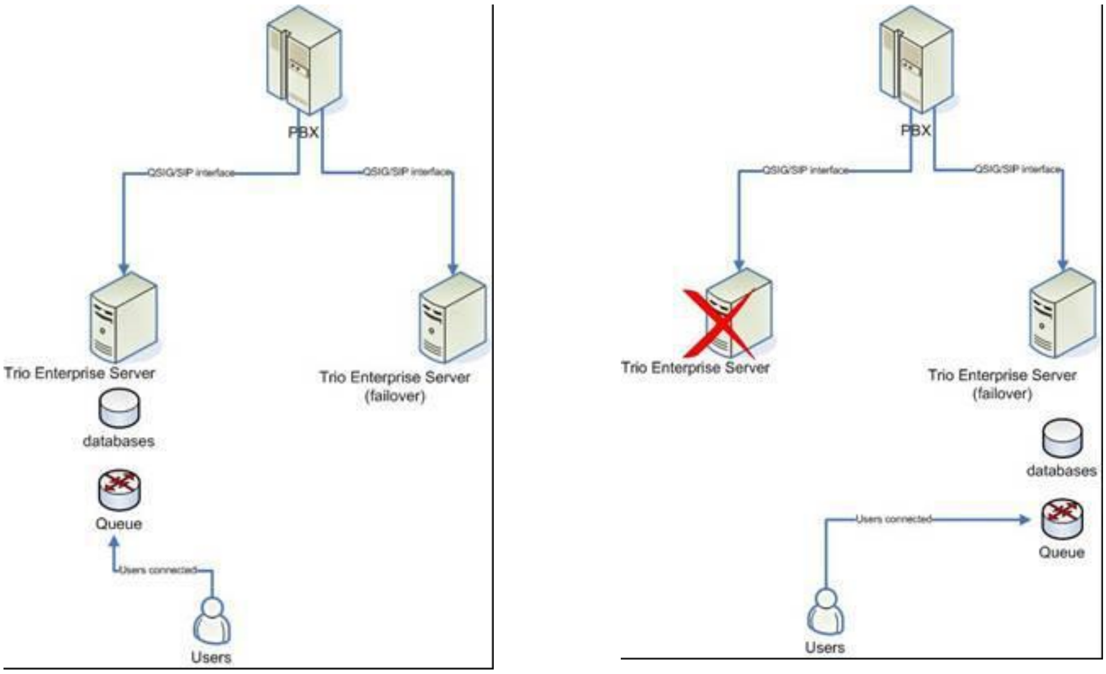
3.5.1.1 Customer benefits

Enterprise Automatic Core Server Failover enables duplicate Enghouse Trio system that can be used in case of hardware or database failure. Today even if the Enghouse Trio server is running in a virtual environment the hardware redundancy offered by the system does not cover database failures that require a restore of the Enghouse Trio system. In such case the customer can easily failover core functionality to another server and restore that main system and at the same time be able to handle calls.

3.5.1.2 How is it licensed?

The license will create a copy of the agent licenses on the Failover core server.. The design must cover the need of Enterprise Line Licences so that in case of failure there are enough of recourses to handle the calls. These licenses has to be bought using the regular Enterprise Line Licenses (Art.No. P004110). If a Skype for Business is used as PBX and the extra lineinterface is not used in normal operation, use the Enterprise Failover Line Server license for SfB (Art.No. p006230) and Enterprise Failover Line License for SfB (Art.No. p006240). Only applicable in Sweden.
Examples:

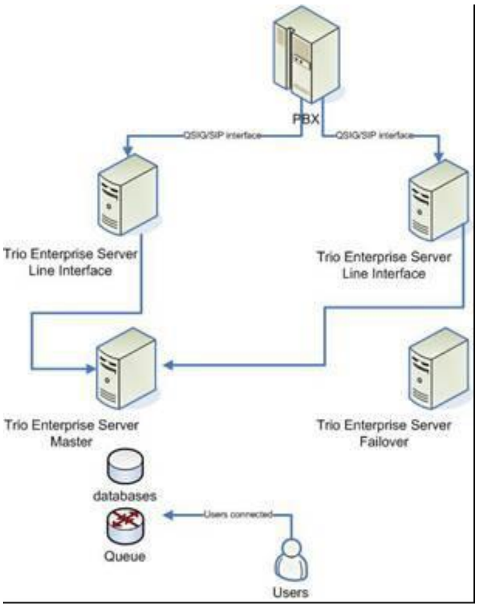
3.5.1.3 Simple failover solution based on two Enghouse Trio Servers



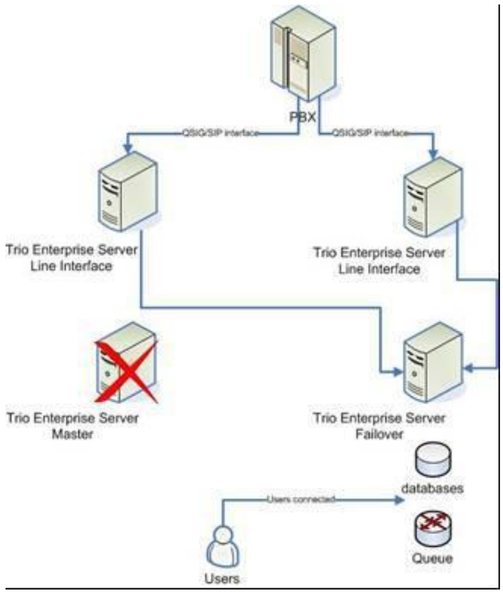
In the example above the system is based on two Enghouse Trio servers and can be deployed the following way:
As standard these two servers shall share the call load, the pbx shall distribute the calls equally between the machines,.
However a possible configuration might be to primarily send all calls to the main server and if that server fails all calls are sent to the failover server. In this scenario the customer wont loose capacity since the failover server shall have the same capacity as the main server regarding line licenses

3.5.1.4 Advanced redundancy based on separate Enghouse Trio Servers for callhandling

Normal operation



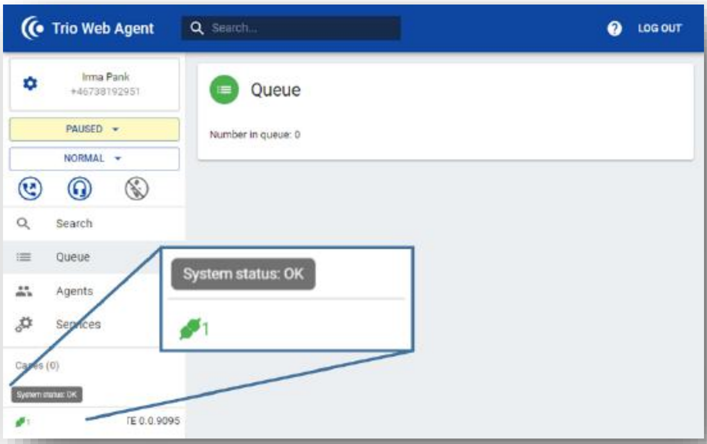
Failover mode



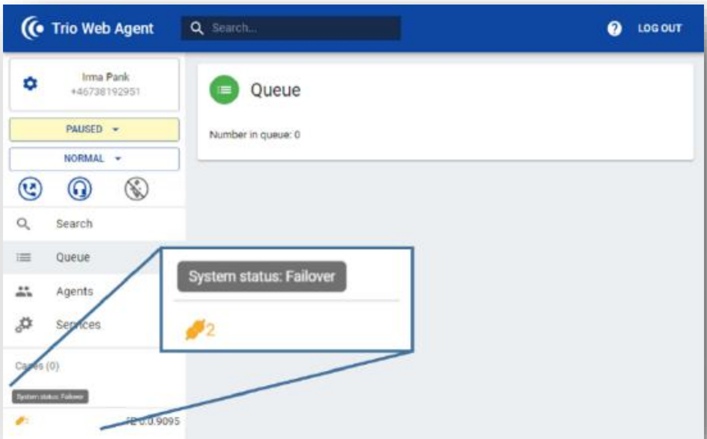
In the example above the servers that are terminating the calls are not the same server that is running
the queue and databases. As standard these two servers shall share the call load, the pbx shall distribute the calls equally between the machines, In case of failure of the Master server the servers that are terminating the calls are redirected to the failover server which shall take over the responsibility for running the queue.

3.5.1.5 How does it work?

The deployment is based on a replica of the Company Directory and queue engine being active on the Enghouse Trio Failover server.
All agents and Attendants have contact with both servers and the status is visible in the Agent window:



In case of failure the client reconnects to the failover server and the status is updated.



The redundant mode is automatically initiated but the normal mode needs assistance from the customer or partner's technician using the Enterprise Management Center tool.
The failover mode does not support referral, inbound outbound e-mail or sms or neither support changes to the configuration, in this mode the customer is able to handle the most important call traffic.

3.5.1.6 Requirements

- A duplica of the main system is required.

3.5.1.7 Special Considerations regarding Failover

Certain features such as recording, statistics, certain contact center features are not fully operational in failovermode. The failovermode is mainly to keep the core call functionality available in case of hardware failure.
It is the Line Interfaces that are keeping track of if the Primary core server and secondary core server is "alive". If a Line interface has a very bad network connection to the Core servers the Line Interface will after repeated tries to reach the core servers ask to go to failover. This means that the whole system will switch to failover even if the primary core server actually is working fine. If the customers suspect bad network connection to one Line Interface it is better to configure manual failover instead of automatic.
If a Line Interface breaks down it is up to the configuration in the PBX to redirect the calls.
Using "message when no agents" and max values on agent for the services is not recommended.

3.5.2 Functionality in case of failure

The following will describe what happens in case of failure with different functions:

Normal Mode	Failover Mode	Product name	Note
Enterprise Server Licenses			
X	X	Enterprise Core Server	The main databases are replicated, this is for CD and CC
X	X	Enterprise Line Server License	
X	X	Support for Quality Management suite	Enghouse Trio support integration with Quality Management suite in failover mode Note that redundant QMS deployment is needed
Enterprise Server Interaction Licenses			
X	NOT ACTIVE	Enterprise Mail Server License(voicemail, e-mail (advanced tasks))	
X	NOT ACTIVE	Enterprise Social Media Server License (includes Facebook and Twitter)	
X	NOT ACTIVE	Enterprise Outbound Call Server License	
X	X	Enterprise Web Communication Server License	
X	NOT ACTIVE	Enterprise Trio Web Chat Server License	Port needs too be changed manually
X	X	Enterprise Call Back Server License (automatic service offered to caller in queue on web)	
X	NOT ACTIVE	Enterprise Inbound SMS Server License	Not active on failover server, the sms messages will be stored on mailserver while the normal server is down and will be sent when normal server is operational again. To solve this the e-mail server need to forward messages to failover server when the normal server is down and the sms gateway needs to be installed on the failover server. However the statistics needs synchronization
X	X	Enterprise Contact Center API Server License	Observe that the CC API statistics will not be available when in failover. For example the service level will be counted from when the failover starts and not from older data.
X	(X)	Enterprise Directory API Server	Possible to read, not change
X	NOT ACTIVE	Enterprise Automatic Agent Server License	
X	NOT ACTIVE	Enterprise Automatic Attendant Server License	
X	NOT ACTIVE	Enterprise Data Manager Server Licence	The Data Manager does not support delete of records when in failover mode.
Enterprise Server option Licenses			

X	NOT STORED IN STATISTICS DURING FAILOVER, possible to find manually	Enterprise Line license (incl Queuing, line protocol and recording)	The files are stored on the normal server after failover goes back to normal mode, however these cannot be played back using the Recording browser in normal mode, If storage of recorded files is a SAN that is always available the users can logon to the Agent recorder browser in the failover system and listen to these recordings
X	X	Enterprise Line license (incl Queuing and SIP line protocol)	
X	NOT STORED IN STATISTICS DURING FAILOVER, possible to find manually	Enterprise Voice Recorder line license	The files are stored on the normal server after failover goes back to normal mode, however these cannot be played back using the Recording browser in normal mode, If storage of recorded files is a SAN that is always available the users can logon to the Agent recorder browser in the failover system and listen to these recordings
X	X	Additional Call Center Server License	
X	NOT ACTIVE	Enterprise Presence Connection to a PBX	Deactivated in failover mode, many PBX do not accept failover
Enterprise System optional Licenses			
X	NOT ACTIVE	Enterprise Call Data Export	
X	NOT ACTIVE	Enterprise Statistics	Statistics are saved in the failover system, only available when choosing the failover server, they are not replicated back to normal server after failover
X	X	Enterprise Real Time Statistics Monitor	Separate monitor should be installed to monitor the failover queue
X	NOT ACTIVE	Enterprise Connection to Teleopti Workforce Management	
X	NOT ACTIVE	Enterprise Connection to Kalix Tele 24	
X	Depending on type of integration	Enterprise Connection to an external system (CRM)	
X	NOT ACTIVE	Enterprise Connection to eDialog24	Port needs to be changed manually
X	X	Enterprise Connection to Microsoft Dynamics	
Enterprise Clients			
Enterprise Agent Clients			
X	X	Enterprise Phone Agent	
X	NOT ACTIVE	Enterprise Mobile Agent (IOS and Android)	In failover scenarios phone agents shall be used logging on using IVR menus
X	(X)	Enterprise Agent Client* (inbound / outbound)	Limitations to outbound in failover mode
X	(X)	Trio Agent Web	Built-in phone is supported in failover mode as long as the line interface is functioning
X	NOT ACTIVE	Enterprise Auto Agent	
X	NOT ACTIVE	Enterprise Auto Attendant Agent	Not active if installed on failing server

X	NOT ACTIVE	Enterprise Phone agent- Trio Agent APP	
Enterprise Agent Client Options – (Requires Enterprise Full Agent Client)			
X	NOT ACTIVE	Enterprise Agent Contact Center (voicemail, e-mail, SMS)	e-mail sent to the contact center are stored on an exchange server, in this case the customers users might use their outlook clients to handle e-mail during failover.
X	NOT ACTIVE	Enterprise Agent Video	Vidyo cases are not queued in failover
X	NOT ACTIVE	Enterprise Agent Visit	
X	NOT ACTIVE	Enterprise Agent Outbound Call	Not recommended to add cases in failover mode, however could be made possible.
X	NOT ACTIVE	Enterprise Agent Web Chat	
X	X – Referrals not available	Enterprise Attendant Trio Web Client	OK, with limitation of handling referrals
X	NOT STORED IN STATISTICS DURING FAILOVER, possible to find manually	Enterprise Agent Recording Client	The files are stored on the normal server after failover goes back to normal mode, however these cannot be played back using the Recording browser in normal mode, If storage of recorded files is a SAN that is always available the users can logon to the Agent recorder browser in the failover system and listen to these recordings
Enterprise Visit Clients			
X	NOT ACTIVE	Visit Web	Normally based on the core server therefore it will not work since the all the visit clients goes against the core server
X	NOT ACTIVE	Visit Security Manager	Normally based on the core server therefore it will not work since the all the visit clients goes against the core server Normally based on the normal server therefore it will not work since the all the visit clients against the normal server
X	NOT ACTIVE	Visit Registration	Normally based on the core server therefore it will not work since the all the visit clients goes against the core server normally based on the normal server therefore it will not work since the all the visit clients against the normal server
X	NOT ACTIVE	Visit Reception	Normally based on the core server therefore it will not work since the all the visit clients goes against the core server normally based on the normal server therefore it will not work since the all the visit clients against the normal server
X	NOT ACTIVE	Visit Web	Normally based on the core server therefore it will not work since the all the visit clients goes against the core server Normally based on the normal server therefore it will not work since the all the visit clients against the 108ialle server
Enterprise User Directory entries			
X	X	Enterprise Directory license	Active

X	(X)	Enterprise Non-user Directory entries including Sync License (Import / Export + LDAP Client)	Export and Import LDAP not active in failover
X	X	Enterprise Skype User license	
Enterprise Managers			
X	NOT ACTIVE	Enterprise Administration Manager License	
X	NOT ACTIVE	Interaction Studio Manager License	No changes are to be made when in failover mode.
Enterprise Extensions			
X	NOT ACTIVE	Enterprise MBN Extension	Call Handling is handled over SIP, the referral and database synchronization is inactive in failover mode,.
Enterprise Connections			
X	NOT ACTIVE	Enterprise Calendar Connection License	
X	NOT ACTIVE	Enterprise two-ways Calendar Connection License	
X	(X)	Enterprise Presence Connection	See SCG for special handling
Enterprise Assistants			
X	NOT ACTIVE	Trio User	
Enterprise Voice (includes VoiceGuide, VoiceMail, Voice Mail Connection)			
X	(X)	Enterprise Voice	Voicemail integration with for example “Call Pilot” would work, if the line interface that stores voicemail if up it will also work.
Enterprise Mobile line status			
X	NOT ACTIVE	Enterprise Mobile line status (Telenor, Netcom, Ventelo, TDC, Telia Sonera)	
Enterprise Guest Web			
X	NOT ACTIVE	Trio Guest	
Enterprise Flex Connection			
X	NOT ACTIVE	Enterprise Flex Connection – CTR	
Enterprise Additional Modules			
Enterprise Text to Speech*			
X	X	Enterprise Text to Speech*	Active per line interface
OTHER			
X	X	Enterprise Personal Welcome Message	Active- lineinterface based
X	X	Additional Call Centers	Active, with limitation to the modules installed.
X	NOT ACTIVE	Enterprise Call back server License	This is not active in failover mode
X	NOT ACTIVE	Web Call Back	The web links are normally pointing to the server in normal operation mode, therefore the web call back wont work

X	NOT ACTIVE	Enterprise Sync	Import of LDAP and from Textfile is not active in failover mode
X	NOT ACTIVE	Enterprise Phone agent- Trio Agent APP	
X	NOT ACTIVE		

3.5.3 Enterprise Failover Line Server License for SfB Art.No. TRIO-P006230

3.5.3.1 How is it licensed?

The article number for the second line server in a fail over solution. Used in Sweden.

3.5.3.2 Requirements

Enterprise Automatic Failover Option Art.No. P006110

3.5.4 Enterprise Failover Line license for SfB (incl Queuing, line protocol and recording) Art.No. TRIO-P006240

3.5.4.1 How is it licensed?

The article number for the second line server in a failover solution. Used in Sweden.

3.5.4.2 Krav

Enterprise Automatic Failover Option Art.No. TRIO-P006110

4 Enterprise User Products

4.1 Enterprise Agent Clients

4.1.1 Enterprise Phone Agent Art.No. P011110

This license enables agents to log on to the system without any client software, using any type of telephone (PBX extensions, IP-phones, Skype for Business, mobile phones, analogue home phones, etc). We call these agents *clientless agents*.

4.1.1.1 Customer benefits

The Enterprise Agent Phone Client enables agents to service their customers, even when on the run. It is also useful as a replacement for simple ACD functions in a PBX, to get features like skill based routing, priorities, personal greeting, etc.

4.1.1.2 How is it licensed?

This requires one license per number of concurrently connected agents logged in without a client. This function is also included in the Enterprise Agent Attendant Client license (Art.No. P011210) , and in the Enterprise Mobile Agent (Art.No. P011120).

4.1.1.3 Considerations

The Enterprise Agent Phone Client will not be logged off or paused when the client does not answer the calls assigned, the system will put the user on hold and try again later.

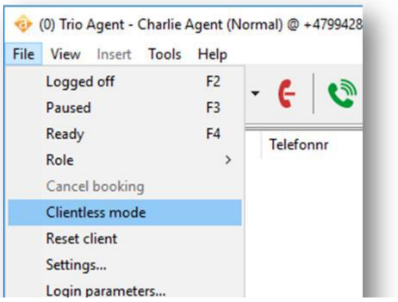
4.1.1.4 Requirements

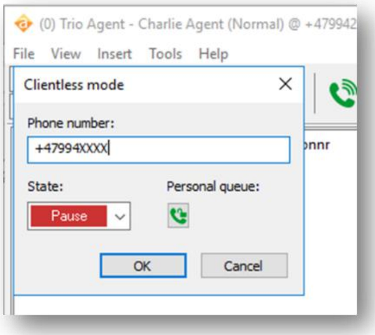
Enterprise Core Server (Art.No. P001210) is required

4.1.1.5 How does it work?

There are a couple of different ways to be logged in as a clientless agent:

- Clientless mode from the Enterprise Agent Attendant Client
  When working as a normal agent, using the Enterprise Agent Attendant Client software, one can shift to clientless mode simply by selecting it from a menu.





A window appears where you enter the phone number to be logged in from, and whether you want service calls, personal queue calls or both. The system remembers the number that the agent last used when being in clientless mode, and will suggest this number as a default option next time.
To switch back simply select the menu item again.

- Clientless mode from an automatic logon number
  Clientless agents often use their mobile phones. When an agent often logs on from the same telephone, one can set up a number in the server for automatic logon. First the administrator must enter the numbers from which the agent may log on automatically.

  When the agent calls the automatic logon number in the server, the agent is directly identified based on the calling number and a phrase is played: “You are now logged on”.

  One can set up many numbers for automatic logon, each with individual settings, which can be combined:
    - Use the same number to log on and off. The first call logs on and the next call logs off.
    - Use separate numbers to log on and off
    - Only log on/off the service queues
    - Only log on/off the personal queue
    - Log on/off both the service queues and the personal queue

  This method is extremely easy to use, but only available from the configured telephone numbers.

- Clientless mode from an IVR menu
  It is also possible to log in by calling an IVR menu in the server. The agent first enters the agent ID. The system then suggests using the number that the agent is calling from. The agent may accept this number, or enter a different one. The menu can also offer a choice of role to login with. To log off, simply call the same number again.

  This method requires entering DTMF, but is available from any telephone.

If needed, these two phone menus can be extended as a customization, to include features like:

- An option to select presence status when logging off

- Logging off the clientless mode
  It is possible to schedule the log off of the Agent Phone Clients by using referrals, for example use the Exchange Calendar connection to schedule when the Agents shall be logged off.
    - For automatic login options for the Agent Phone Client please contact Trio Presales.

Other features available for the clientless agent:

- *Queue handling*
  Queue messages, music play lists, opening schedules, exceptions, priorities, messages and applications when closed, unstaffed, full queue, etc.

- *Skill based routing*

- *Personal Greeting* (if that module is chosen)

- *Message to clientless agent*.
  When the agent answers, a message can be played for the agent before the customer is connected. This message may inform the agent what type of call this is (“Call for IT support”), so that the agent may prepare himself. This is a sort of “audio screen pop”.

- *Detailed statistics*

- Works with *Enterprise Real Time Statistics Monitor*

- *Connecting calls*
  The agent may perform consultation calls, switch between the customer and the consulted party, hang up the consulted party and transfer the call.

- *Stop and start recording, observe that if the agent starts recording when the call has been going on for a while, two recording files from the call will be created, one before the agent press record and one after.*

Some features not available for the clientless agent:

- *Contact Center features*
  Mail, SMS, Chat, Twitter, Facebook, Tasks and Voicemail Tasks are not available.

- *Call Back*

4.1.2 Enterprise Mobile Agent – Application (APP) for IPhone and AndrOId Art.No. P011125

The Enterprise Mobile Agent – Trio CC is a Smartphone Application that gives the agents the features needed when serving the Call Center without the need to access the PC.

4.1.2.1 Customer benefits

The Enterprise Mobile Agent APP is a native IOS and Android application that runs on Apple Iphone and Android devices. It provides functionality found in the Enterprise Agent Call Center Client such as:

- Setting of working mode, ready or paused.

- Call and queue preview with queue name, inbound name/number including name based on information in the company directory

- Redirected call information with name, number and redirection cause: no answer, busy or referred.

- Company directory search with support for same department, same title with ability to send e-mails.

- Outbound calls and transfer support based on search results (extension/mobile) or freely specified numbers
- Support for callback handling with possibilities to postpone cases
- Detailed information about returning calls.
- Management of recordings
- Historical Casehistory with access to the recorded calls.
- Personal queue handling, open or closed, with own referral management.
- Skill-based-routing is tuned by the agent with roles that are managed in the agent interface.
- A view for other agent's availability showing other agents status right now.
- Display of queue time and case time that passed for the active case.
- Supervisor functionality: Possibility to open and close queues, overview of status, receive alarms and login and out agents.

The main points is that call distribution is handled as always based on longest free agent. Since the application will both notify the agent about call information and show it in the main view the agent gets a screen information that is similar to the desktop agents.
The Call Center Agents can now become fully mobile.

4.1.2.2 How is it licensed?

This requires one license per number of concurrently logged in Enterprise Mobile Agent, the license is included in Enterprise Agent (Attendant) Client (Art.No. P011210).
Switching off the application will not log off the agent but let the agent keep their state as it was when switching off the application. This means that in the ready or paused mode one (1) license is consumed even when the application is switched off. In Logged off mode the agent cannot search in the CD, see other agents status or the history of cases. Only the queue will be active.

4.1.2.3 Considerations

The Enterprise Mobile Agent will not be logged off or paused when the client does not answer the calls assigned, the system will put the user on hold for 60 seconds (configurable) and try again later.
Functions such as contact center, and Outbound Call (Telemarketing) require Enterprise Agent (Attendant) Client (Art.No. P011210).
The Mobile Agent APP- Trio CC does not support different time zones

4.1.2.4 How does it work?

The Trio CC is launched using the desktop icon as any other application. On start up the user will need to specify the connection parameters. Next time the application is started the parameters used before will be reused.

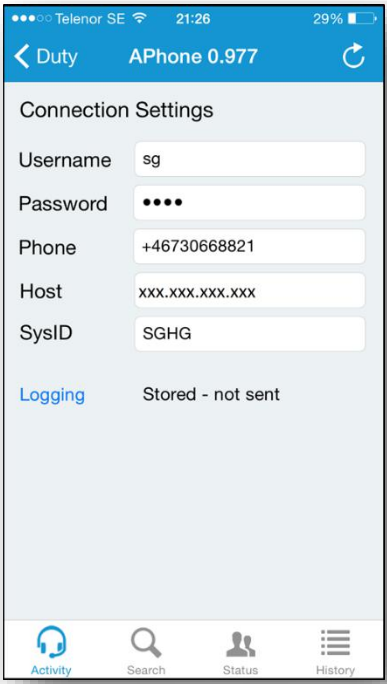
4.1.2.4.1 Logon and connection parameters

4.1.2.4.1.1

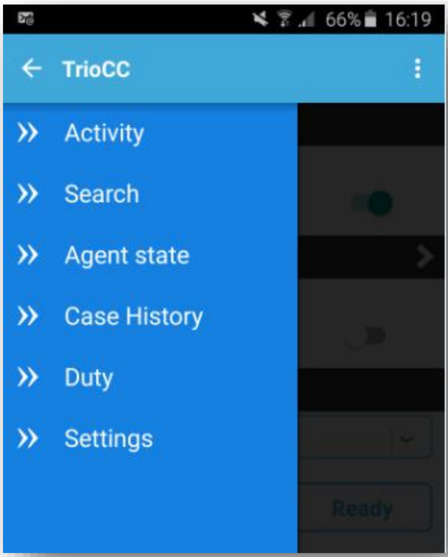
When the application starts for the first time the user needs to fill in the username, password, the answering device phone number, server address, the systemid (if there are multiple Enghouse Trio servers sharing the same DMZ proxy server) and which of the Contact Center instances that will be used.

To gain quick assistance and to obtain support faster the user can enable logging and send the log files to the server for easier remote support assistance.

The settings will be remembered next time the application is restarted.



In the Android version there is no toolbar at the bottom.



4.1.2.4.2 Main view and set status

One logged on and ready or in pause the agent has access to some features:

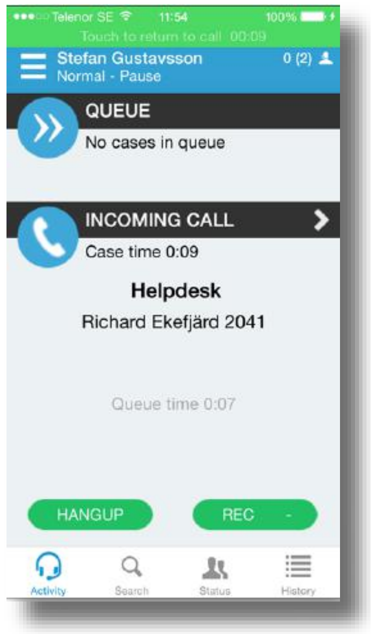
The agent will see the agents own name and state.

Displayed real-time info will be available for, number of agents logged in, number of agents ready within parenthesis, number of cases in queue and maximum waiting time in queue.

Also here the agent will have access to the search, dial and transfer dialogue, the overview of other agents and historical information.

4.1.2.4.3 Callhandling in ready mode

When ready the Agent will be assigned calls automatically without having to act.



When being ready the agent will be presented information about the incoming call before the phone will ring.
With other applications in the foreground or with locked screen the system will notify the agent with queue name and the inbound caller number. The notifications differ if the agent are in ready or pause mode. In an Android smartphone notifications works different as in an Iphone. Notifications do not pop-up on the screen, the user has to scroll down to see a notification.
Once the call has been answered the agent can start to record it, transfer it to another destination or end the call.
In the presented case the Agent has already an active call in ready mode.

4.1.2.4.4 Queue preview

In Pause mode the queue preview enables the agent to decide which call to book themselves. The number for the queueing callers and callbacks are displayed, the preview can also be used to review the tasks in the queue.

4.1.2.4.5 Callhandling in pause mode

There are some differences to the call handling when the agent is in pause mode:

The activity dialogue will change when there are calls in queue waiting to be answered.

At this time the agent can review the queue details, book a case and see in real-time information about the number of queuing and maximal queue time.

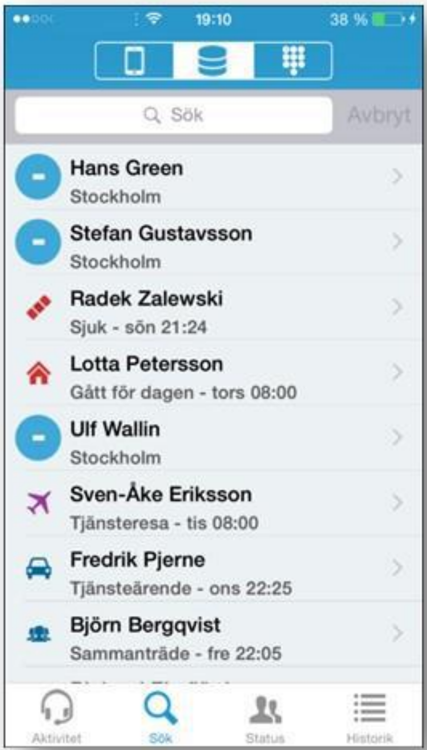
Similarly to the ready mode, when other applications are in the foreground or with locked screen the system will notify the agent with information that there are calls in queue (note the difference between notifications in Andriod and in Iphone).

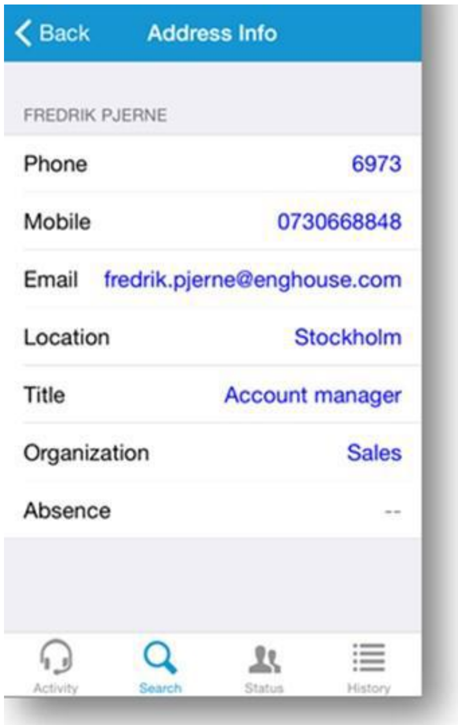
Once the call has been answered the agent can start to record it, transfer it to another destination or end the call.

4.1.2.4.6 Searching and dialing

In the search dialogue the agent may search the Enterprise Directory database to locate a suitable person to connect a call to.

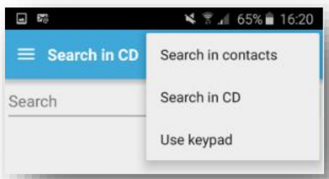
Search can be performed both in the local phone directory as well as in the Company Directory. Searching is made for both first and last name in the same time.
The list will show current absence information, active referral will be displayed together with return time.

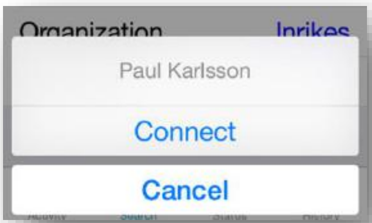




To transfer to or dial a person's extension or mobile number the Agent can just press these number in the detailed view.

Andriod version when searching:





The agent can press on the name for any redirected person and this way find other colleagues by quickly search for same department, title or location.

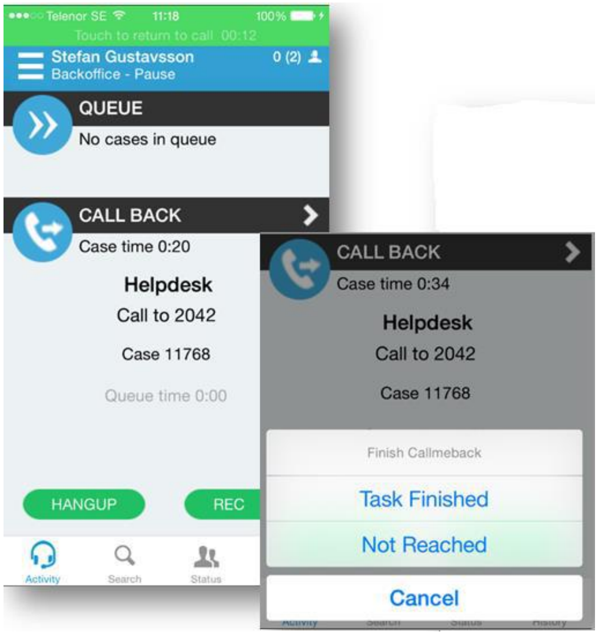
4.1.2.4.7 Transfer and call

As mentioned earlier the agent can use dial or blind transfer. The destination is either an entry in the local phonebook, a name from the company directory or a freely specified number using the dial pad.

The return time parameters when transferring a call, uses the default values set for the queue the call came from. This way the agent does not need to do more than to choose transfer.

Queue on busy does not have any special handling more than that the call will return with cause busy after timing out.

4.1.2.4.8 Management of CallBacks



The agents can also handle callbacks. This means that the agent can preview and accept an outbound task.

Similarly to the desktop agent the user can categorize the result, close the case and mark complete or postpone it when the destination could not have been reached.

4.1.2.4.9 Messaging – e-mail

With access to the directory the Agent can send e-mail messages to the persons in the company directory to leave a message that might be related to the call handled.

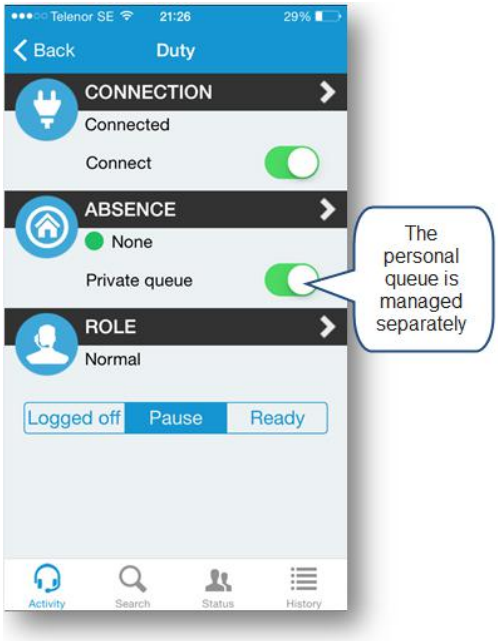
4.1.2.4.10 Referral and personal queue

The agent can set their own absence by selecting among the predefined codes.

The default return time based on the templates will be suggested however the agent can freely specify other return times.

Absence can be set from NOW and it is not possible to make a forwarding to another number.

Andriod version:



The personal queue is managed separately from the Logged in, Pause and ready modes.

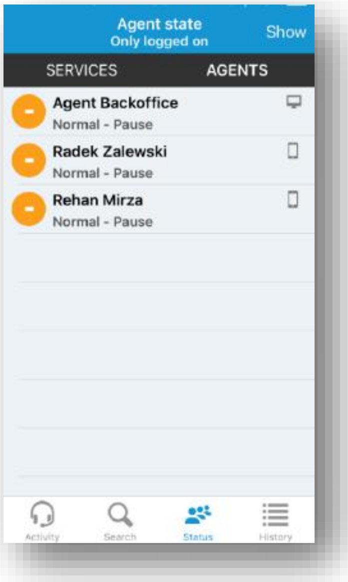
The agent can for example decide if the queue shall be open when being logged off or closed in pause mode.

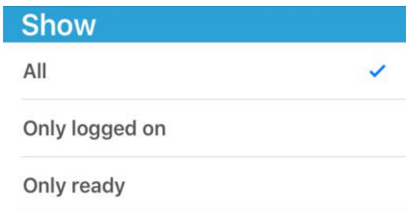
4.1.2.4.11 Review status for other agents

The Agent status view will display information about all the agents. The user can also filter the view by logged on, ready or all.

This way the agent will get additional information needed before they decide to leave/log off the Contact Center.

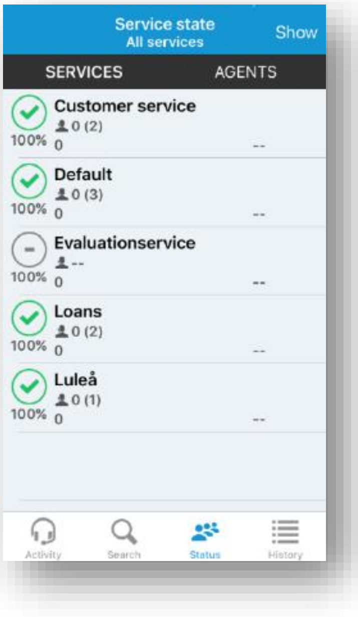
The agents will be able to see all the agents in the system if the agent are not locked to certain customer groups.





4.1.2.4.12 Review Status for Services

The agent can see status of the services. The agents can see all services if they are not locked to certain customer groups. The agent will be able to see if a service has an alarm.

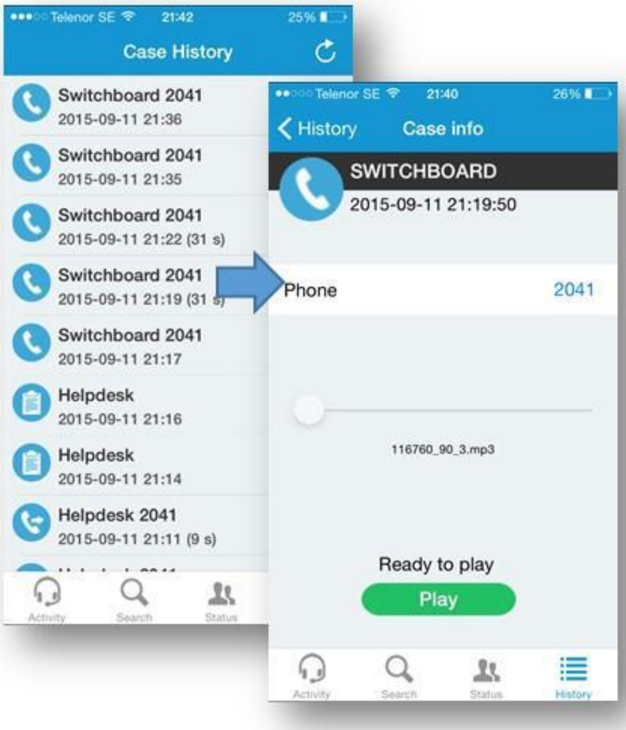


4.1.2.4.13 Review the history

In the history view the agent can review the previously handled cases (40 last cases).

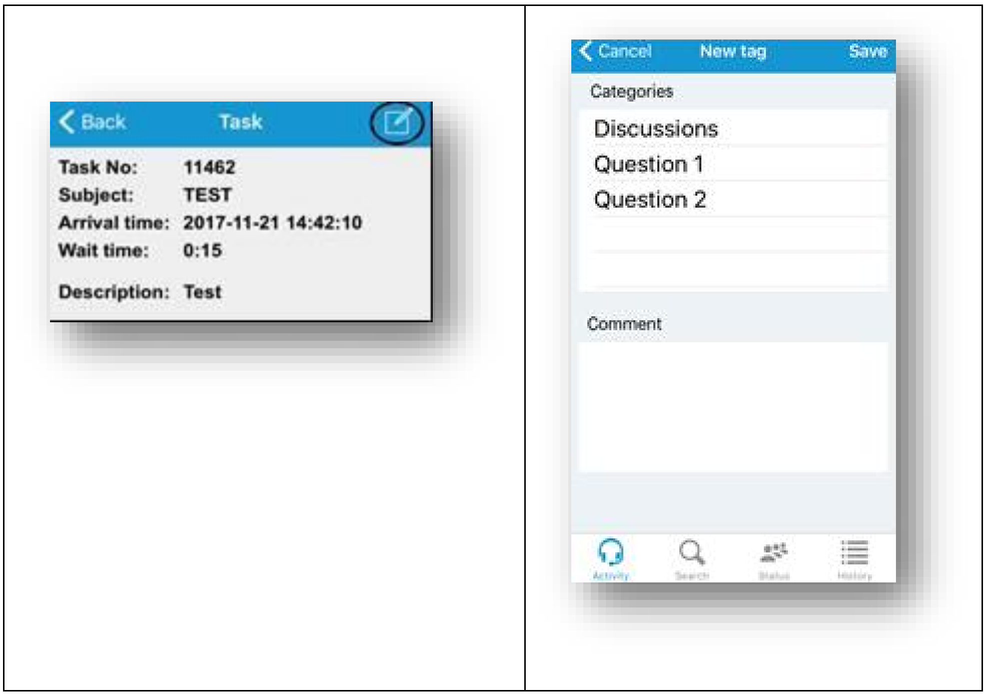
Recorded calls can be played back.

The agent can initiate calls to the callers if they need to follow up previous discussions.



4.1.2.4.14 Tag cases

The agent can tag (categorize) or comment on an ongoing case:



4.1.2.5 Supervisor functionality

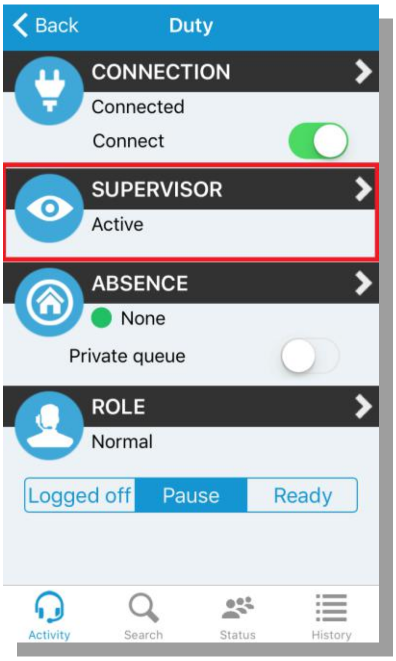
The Mobile agent, Trio CC app, has been enhanced with supervisor functionality. Supervisors are no longer tied to their desks. They are now free and allowed to move from place to place while accessing the information they need at their fingertips. The supervisor functionality includes open and close queues (services), overview of queue status, receive alarms and login and out agents. Alarms will be sent in “logged off” mode if the supervisor mode is on.

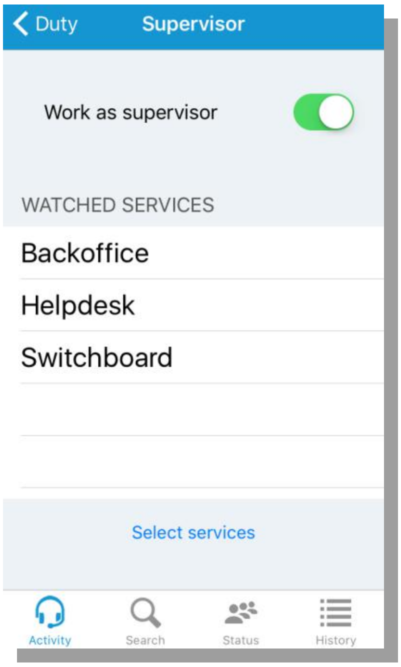
4.1.2.5.1 How is it licensed?

There is no license for the supervisor functionality, it is part of the Mobile agent license.

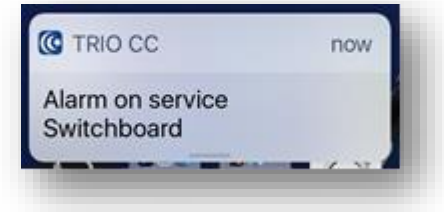
4.1.2.5.2 How does it work?

The agent will get supervisor rights if the “May open/close services + admin of TM” is marked on the agent in CC-Admin. When logging in to Trio CC a supervisor section will then be visable. In the supervisor section the agent can activate the supervisor mode and choose what services to watch (Picture from an Iphone)

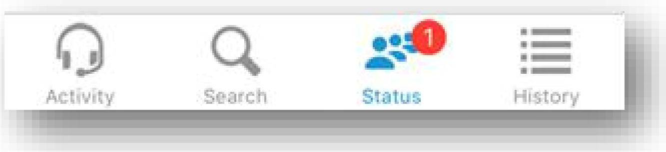




The supervisor will get notified if there is an alarm on one of the watched services. The alarm will be configured in CC-Admin. Alarms can be set on amount of agents logged on, queue length and waiting time. The notification will only be sent once.



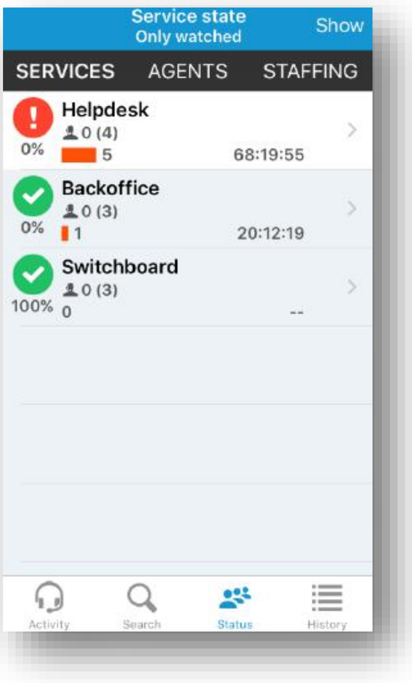
The status icon in the Trio CC app will get an alarm sign:

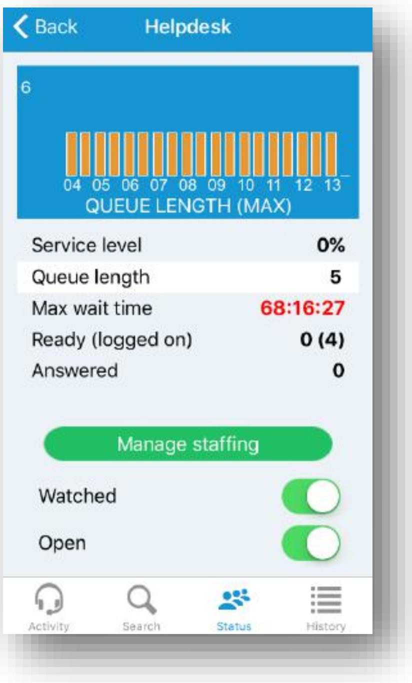


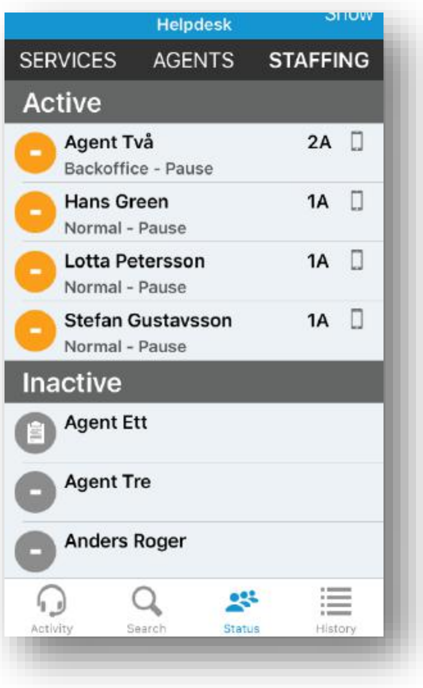
The alarm levels are configured in CC admin and can be set on logged in agents, queue length or waiting time. For example an alarm can be generated if the waiting time exceeds 10 minutes or if the logged in agents are below 2 during opening hours.

The supervisor can see which services are having an alarm and why. The supervisor can login or log out agents in order to try to staff the service in the best way.

Example below: The service “Helpdesk” has an alarm. By clicking on “Helpdesk” the supervisor can see that the alarm is sent because the max waiting time has exceeded the configured limit. The supervisor can open and close the service and stop watching (monitoring) the service. By clicking on “Manage staffing” it is possible to see which agents are available to help out.







4.1.2.6 Switching between Mobile and Desktop

The best way to switch from desktop Agent to Enghouse Trio Mobile Agent is by simply starting the application on your phone and choose ready or pause state. The Desktop Agent will be logged off and calls will be managed in the mobile device.

Once back at the desk you simply logon again and the Enghouse Trio Mobile Agent – APP will be logged off.

4.1.2.7 Other features available for the Enterprise Mobile Agent App

- *Queue handling*
  Queue messages, music play lists, opening schedules, exceptions, priorities, messages and applications when closed, unstaffed, full queue, etc.

- *Real time status and historical statistics*
  The Enterprise Mobile Agent is supported by all real time status and historical statistics modules.

4.1.3 Enterprise Auto Agent Art.No. P011140

4.1.3.1 Customer benefits

Enterprise Auto Agent is an Agent that automatically calls customer and plays an IVR-Dialog. The Auto Agent can be used:

1. Take care of outgoing calls together with the Outbound Call Server License
2. Used with the Survey, Enterprise Automatic Agent Server License

The Auto Agent is configured the same way as a regular agent but has a different type code (Auto Agent). The Auto Agent has roles and competences as a regular agent and works according to the configured schedules.

4.1.3.2 Requirements

Enterprise Automatic Agent Server License (P0Art.No. P002180)

4.1.4 Enterprise Agent Attendant Client Art.No. TRIO-P011210

4.1.4.1 Customer benefits

Enghouse Trio offers an integrated contact center solution, Enterprise Agent Client. Enterprise Agent Client is the ideal solution for organisations with rapid growth, distributed teams, high levels of teamwork, remote sites and road warriors. The advanced Enterprise Agent Client adapts to your agents' needs, by streamlining multi-channel communications tasks and ensuring that each agent has real-time knowledge about their tasks.

- Adapts to rapid business growth or change, by pooling your resources together across the enterprise.
- Offers superior service to your customers.
- Improves communications process control and measurement. Identifies and automates low-value communications processes.
- Reduces total cost of ownership. Enghouse Trio with Enterprise Agent provides a single solution that will adapt and grow for even the largest companies.
- Manages your resources: Call recording, process reporting, and real-time business metrics.

4.1.4.2 Special considerations

The Enterprise Agent Client is a Windows application, and needs a phone to handle the voice. You can use the Enterprise Agent Client with any phone. Phones can be divided into three different categories:

- Standard phone using bridging
- Standard phone using Auto answer
- Microsoft Skype for Business

- The Agents also has the option to work in "Open Line"
  For more information about these options, see the chapter on phone options.

4.1.4.3 How is it licensed?

It is licensed per simultaneously logged in agent. Each license can either be used with the windows client, or used as an Enterprise Phone Agent client or an Enterprise Mobile Agent Client.

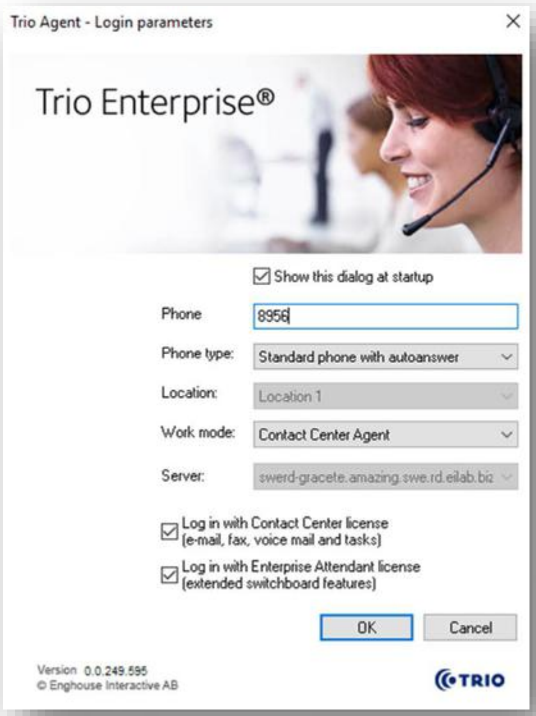
4.1.4.4 Options

- Enterprise Agent Contact Center (Art.No. P012210). Trio Agent Web does not support Contact Center cases.

Art.No. TRIO-P011210 also includes the Trio Agent Web

4.1.4.5 How does it work?

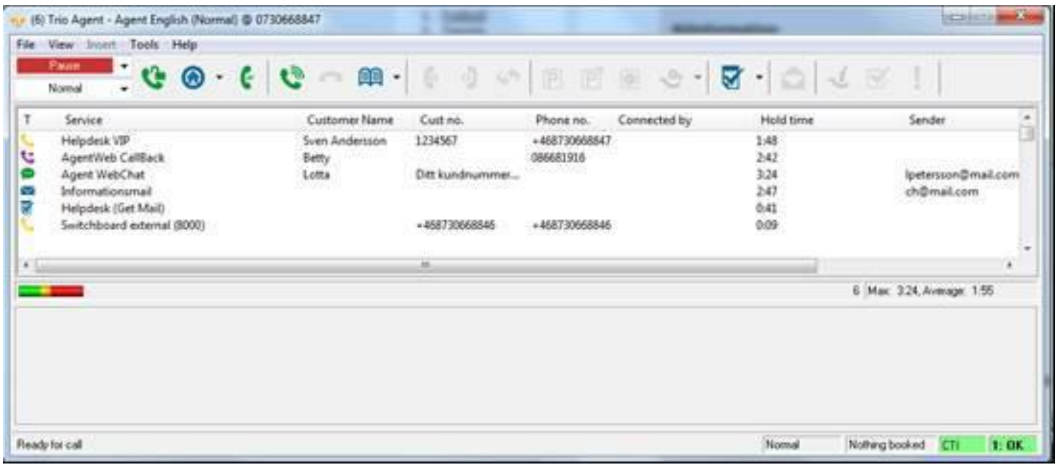
You can log into the system from any computer on the LAN or connected to a VPN. Trio uses standard TCP/IP connection for data. The Voice connection can use any phone and is connected through the PBX or through the public network.
The users login using Single Sign on (See section Single Sign on for more information)
Upon logon the users can select, phone number, phone type, location, work mode, Server and if the agent will login with Contact center rights and Attendant rights. There is also a checkbox for if the agent does not want to get this selection box when starting the agent. The selections can be done from inside the agent client and after a restart parameters will be changed according to the new selections made. The Enterprise Agent Attendant Client will use single-sign on.



4.1.4.6 Key functions in Enterprise Agent

- Free seating on any phone extension, home phone or mobile phone.
- Answer inbound calls
- Answer returning calls
- Return to the same agent
- Park calls
- Book calls from the queue
- Call out to any number

- Personal queue enables the agent to receive personal calls and agent calls, with only one phone set. The personal queue contains queue messages and other queuing services.
- Connect call to internal or external number from the attendant search
- Connect call to service (caller will maintain queue time and position in queue)
- Set caller in queue to any number, internal or external
- Line status (where this is supported in our platform connection of mobile operator connection)
- Search in address book, quick and combination search (Requires attendant license)
- Send messages SMS / E-mail
- Record (Requires Enterprise Voice Recorder Line License).
- Real-time statistics
- Monitoring agents/attendants
- Wall board (Requires P005130 Enterprise Real Time Statistics Monitor.)
- Historical statistics /charts
- Toggles between caller and internal extension
- Tag calls (tags the call with any distinction like, good customer, willing to invest…)
- It is possible to create both global and service specific tag lists.
    - it is possible to create tags in two levels.
- Chat functionality with other agents
- Send instant messages to all or selected agents
- Customer Casehistory
- Specifying needed post processing time; the time that the agent needs to follow up a case is added to the case and is available in the statistics for analysis.



4.1.4.7 Call handling

- Answer calls from the queue
- Book calls from the queue
- Customer information displayed when answering call
- Pre-processing time
- Post processing time

- Connect call to any number
- Send call and customer information to another agent
- Sound notification when new call is assigned
- Personal call history
- Send message to another agent
- Broadcast messages to all agents
- Group ringing: even if set in “pause” agents will get a ringing signal in the PC when there is an incoming call.

4.1.4.8 Real-time functionality

- Queue list with customer information (in the Agent window)
- Number of calls in queue
- Maximum wait time
- Message waiting
- Service level indication

  The queue window displays all the cases currently in the queue. The cases that the agent actively is working on are marked with a lighter blue colour. Columns shown in the application are configured in the Trio Administrator program under “Columns”. It can be configured different for every agent. It is possible to add a column that will show the “expected” queue time that the case was given. This will be presented for every case and it will give the agent the information if the caller has been waiting longer than expected or not.
- Possibility to preview cases

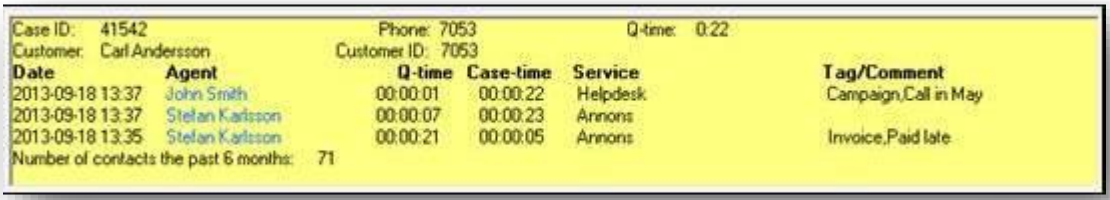
4.1.4.9 Real-time status

- Logged on, paused, ready
- Assigned call / task
- Answered call / task
- Average call time
- Total call time

4.1.4.10Customer history and information field

In the bottom pane of the Enterprise Agent Client there is a window displaying information about the customer, and historic data for the last three times the customer has contacted the Contact Center. Information in this window can be configured for each system installation. The data can be collected from an Enterprise Agent database, or from a CRM connection (requires P033910 Connection to an external system (CRM) or Connection to Microsoft Dynamics (Art.No. TRIO-P005190)). It’s possible to use links that give the user an easy way to find out which agent helped the customer latest. It’s also possible to use links to activate external systems (requires P033910 Connection to an external system (CRM) or Connection to Microsoft Dynamics (Art.No. TRIO-P005190)).

The agents can note details regarding a case before sending the case to another agent or service, the information noted by the previous agent is available in the infromation field.



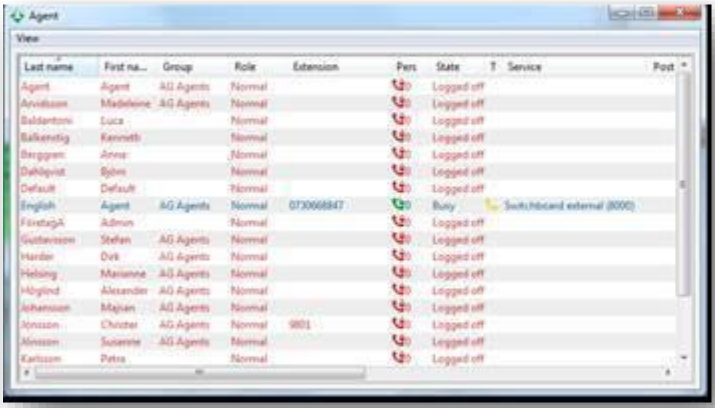
4.1.4.11 Real-time monitoring and statistics

The Enterprise Agent Client has up-to-date statistical information that can be displayed in the client or in separate windows. This statistical information can also be accessed when you log into the Agent using a guest account, which does not require a license.

- Agent's window
  shows all agents, or agents belonging to selected agent groups. Agents can be configured to see all, or just the agents belonging to the same service as him/her. You can see the status of other agents with real time information and statistics of each agent like;

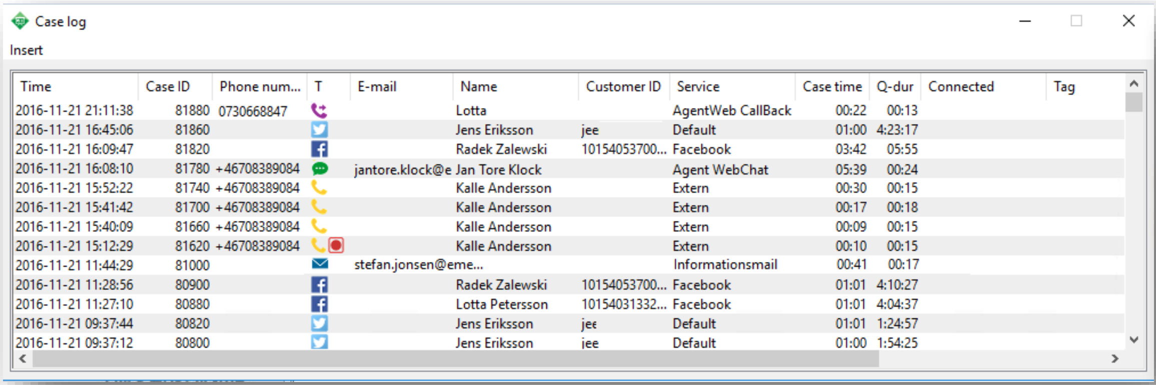
  - Name
  - Group
  - Role
  - Extension (the extension the agent used when logging in)
    - The Agents extension can be hidden for another colleagues to prevent calls directly to that extension and encourage the usage of personal queues.
  - Personal queue status
  - State (logged off, paused, ready)
  - Task (type of task the agent is servicing; call, e-mail, fax,)
  - Service (the service that the active task was assigned from)
  - Presence status (registered presence status in the Enterprise Directory)
  - Time (time the agent was logged on)
  - Ready time (time the agent was logged on minus pauses)
  - Cases (the number of cases assigned to the agent)
  - Answered (assigned cases that the agent has answered)
  - Busy (assigned cases not answered – agent was busy)
  - Unanswered (assigned cases not answered)
  - Failed (assigned cases transferred to agent failed)
  - Average-T (average time for each case)

- Tot-T (total time handling cases)



- Casehistory
  Shows all cases assigned to the agent. The Casehistory contains a configurable number of cases (default 200, maximum 500)

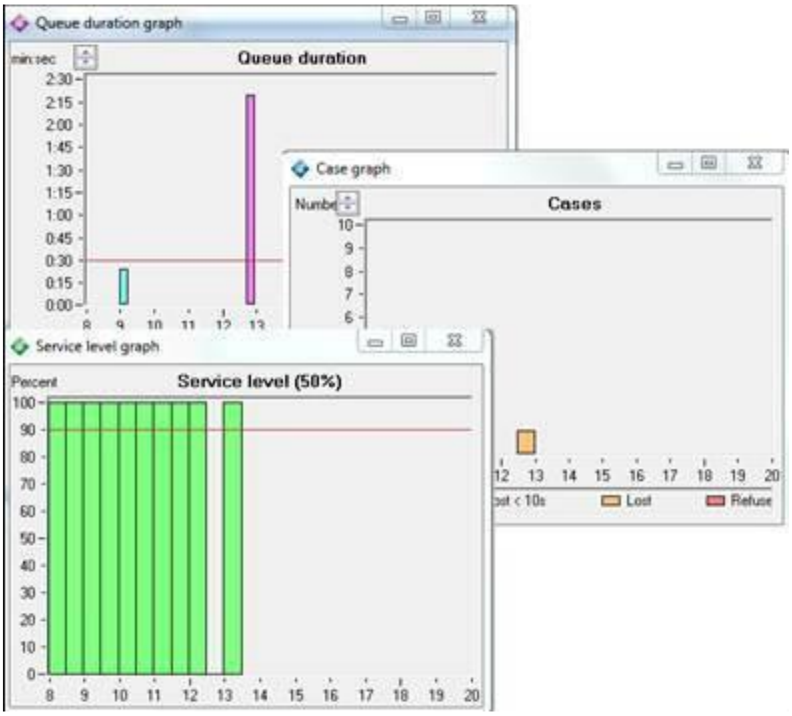
  - Answered
  - Case ID
  - Phone number
  - Task
  - E-mail
  - Twitter
  - Facebook
  - Name
  - Customer ID
  - Service
  - Case time
  - Q-duration
  - Connected
  - Tag
  - Comment



Missed cases to the agent’s personal queue will be shown in red. This gives the agent the possibility to call back. Calls to the agents personal queue when the queue was closed, will also be shown. Also where the call or task was connected to will be shown in column “connected”

- Statistics window
  Shows statistics about all cases assigned to the agent. The statistics window only contains information about the current day.

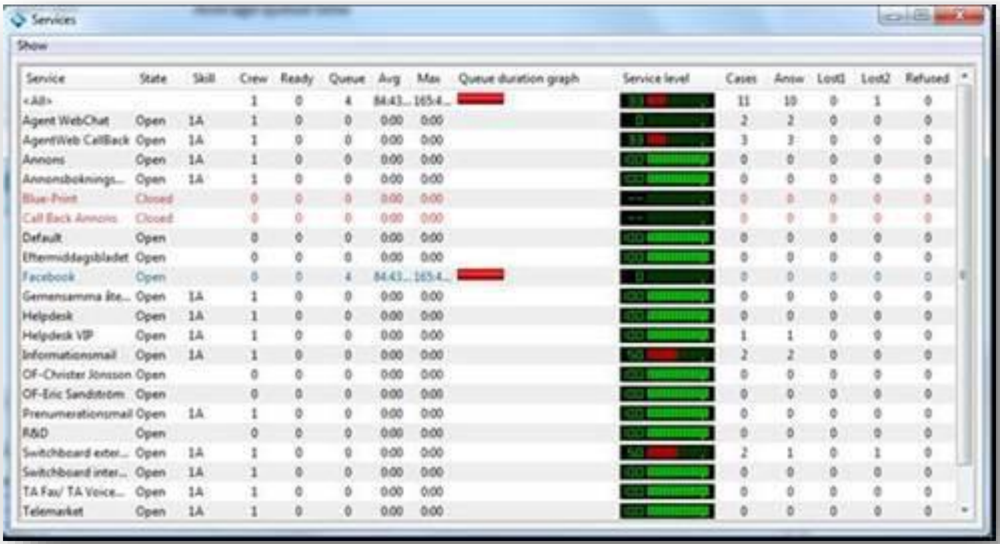
  - Date
  - Period
  - Cases
  - Answered
  - Lost-1 calls lost from 0-10 seconds.
  - Lost-2 calls lost > 10 seconds
  - Refused
  - Average queue time
  - Max queue time
  - Average queue time 2 (see lost 1 and two)
  - Average handling time for the selected services
  - Total handling time for the selected services
  - Service level



- Service window

  Shows service levels of all cases assigned to the service. Each agent can be set up with different rights, as to which services they should be able to see.

  - Service
  - State Open/Closed
  - Skill Skill for the agent
  - Crew Agents logged in to the service (also paused)
  - Ready Agents ready to receive cases
  - Queue Cases in queue
  - Average Average queue time
  - Max Max queue time
  - Queue duration (graphical representation)
  - Service level (graphical representation)
  - Cases
  - Answered
  - Lost-1
  - Lost-2
  - Refused

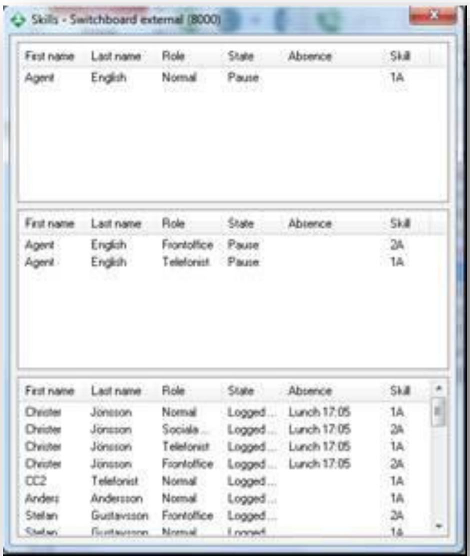


When a user clicks on a service in the service windows the skill window will open. The skill window contains of three sections:

The top window shows the skills for the logged in agents who are working in the specific role.

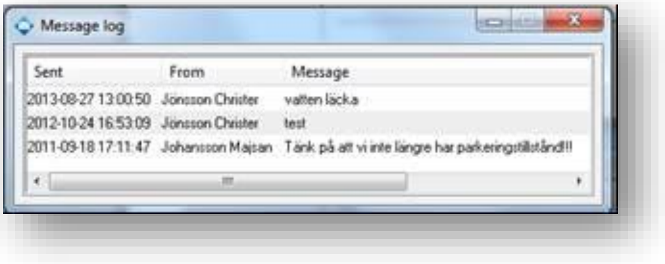
The middle window shows the skills for the agents that are logged in but are working in a different role. A supervisor could look at this window and ask the agent to switch roles to be able to help out.

The bottom window shows agent skills that are logged off. Since the referral is visible it is possible to see when the agent is expected back to work.



The service window can also be used for the agent to freely choose which service he/she wants to receive cases from. The functionality is called selectable skills and is configured in the administration program.

- Message log — Messages sent and received for agent

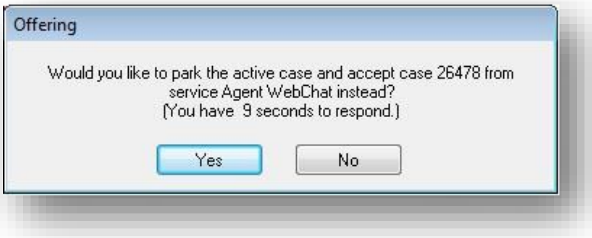


4.1.4.12 Park

An agent that is currently handling a message may choose to park it and continue to work with it later, by pressing the parkbutton. 

The agent opens the message again by double clicking on it. The system will automatically accumulate the total handling time.

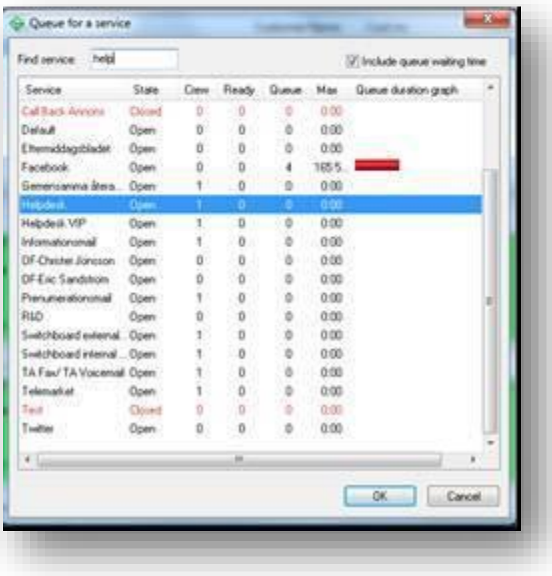
The server can also generate automatic park offerings to agents that are occupied with a message, if there are no other agents available for a new incoming phone call.



Send to queue for another service

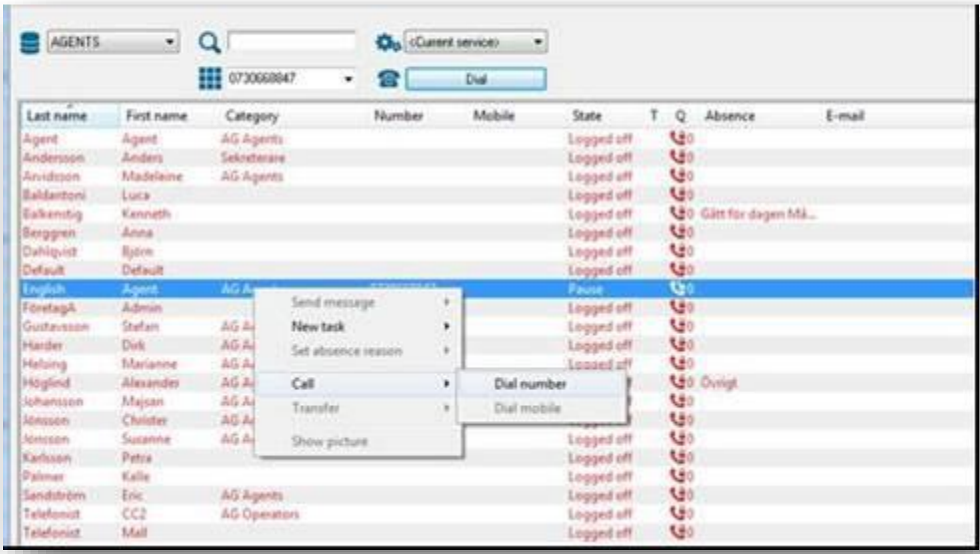
The agent may also forward the message to another service, e.g. if the message should be routed to another group of agents, with more appropriate skills.

The agents in the other group can see which agent forwarded the message.



Connect to a specific agent’s personal queue

If the agent handling a message decides that a specific agent is most suitable to handle the message, he/she can forward the message to the other agent's personal queue. This is done in the address book window.
If the other agent has not opened the message within a specified time, the message may return to the originating service. In this way one can avoid having customer inquiries waiting too long before being handled. Each service can have a default returning time (maybe one or two days). The originating agent may override that setting for each individual message.



4.1.4.13 Customer Case log

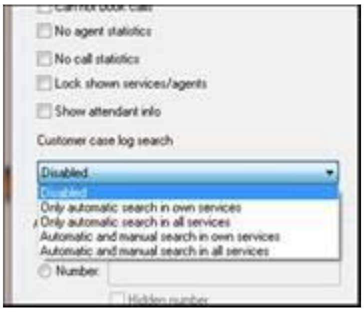
The customers are contacting the Contact Center in different ways and different amount of times. The customer Casehistory will help the agents to keep track of the customer.
The customer Casehistory displays other cases from the specific customer. If a customer has several callbacks or E-mails in the queue the agent will be able to see all of the callbacks/E-mails and ask the customer if the cases are all similar and if agreed, close them. It is also possible for the agent to do a historical (manual) searches. This can be useful if the customer claims that he got another answer from another agent. Then the agent searches for older cases and will see what has been answered or which agent handled the previous cases.

Functionality

> There are three different settings for the customer Casehistory. First there is a setting in CC-Admin for the specific service. If the service will not use the customer Casehistory or if the service automatically will pop mail and callbacks in the queue or not pop at all. It is recommended to not have the customer Casehistory enabled on services that have a lot of cases from the same "sender/customer". An example of this is a service that will receive e-mails from a website. The "sender" will be the same even if there is different persons filling in the web form. There for there is no use to have the customer Casehistory active on this service since the current customer case that the agent is handling has no reference to the other cases in this service.

Then there is a setting in CC-Admin on the agent. The agent setting has five different choices:

- Disabled, no customer Casehistory for the agent. The agent will not be able to open the log at all.
- Automatic search in own services, the customer Casehistory will pop if there is a call back or an E-mail in the queue for services that the agent has competence for. The agent can see historical cases but will not be able to search for other cases.
- Automatic search in all services, the customer Casehistory will pop if there is a call back or an E-mail in the queue for all services in the system. The agent can see historical cases but will not be able to search for other cases.
- Automatic and manual search in own services, the customer Casehistory will pop if there is a call back or an E-mail in the queue for services that the agent has competence for. The agent can see historical cases and will be able to search for other cases.
- Automatic and manual search in all services, the customer Casehistory will pop if there is a call back or an E-mail in the queue for all services in the system. The agent can see historical cases and will be able to search for other cases.



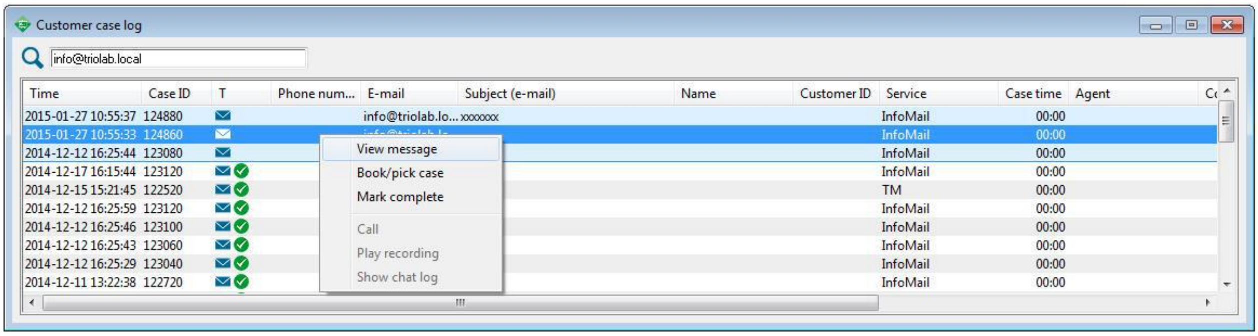
When an agent takes a case from the queue a search in the database will be made for other cases that has the same phone number, customer ID or email address.

Email: Searching for waiting E-mail in the queue will be done by first searching for a customer number if present and then the email address. When searching for historical data the same search will be done as above.

Callback: Searching for waiting callback in the call will be done based on the phone number. When searching for historical data the same search will be done as above.

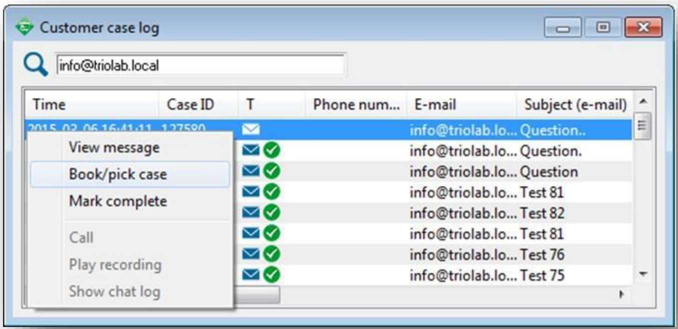
Phone call: For historical data the customer ID will be used. It is common that the services are configured in the system to use the phone number as customer number. If “calling number as customer ID” is not used there will be no hit on historical search on phone numbers.

The customer Casehistory will display the cases waiting in queue on the top of the log with a light blue background. The historical cases will be placed under and have a green check-icon showing that they have been handled.



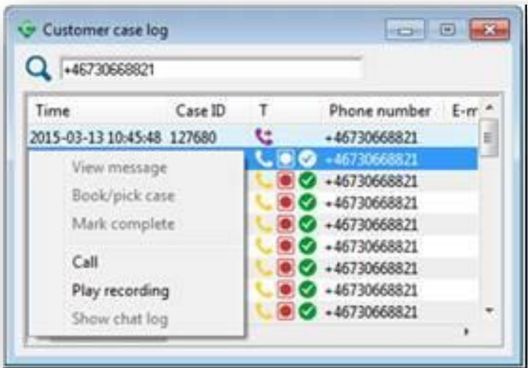
The agent can:

- View the message to take a decision if it has the same topic and can be closed or needs to be taken care of later.
- Book/pick the case to work with it later.
- Mark the case complete. In the statistics the case time will be set to zero.



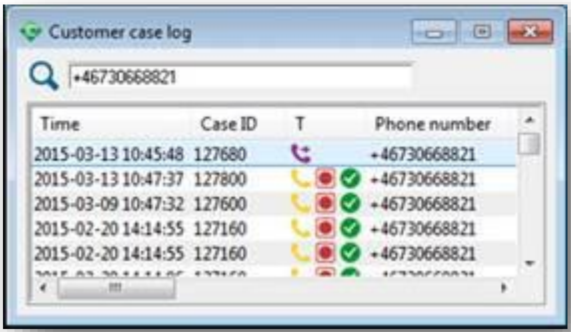
Other actions:

- Start an outbound call (for all cases that has a phone number)
- If a customer claims that another agent promised something the agent can verify that this is true by directly play back the recorded call
- For the same reason it is also possible to show the conversation from a chat case.



- Manual search

  It is possible to search manually for External phone numbers, Internal numbers (Address space is needed) and E-mail addresses.



The search will be made three months back in the database and in the customer Casehistory window, 40 items will be displayed.

4.1.4.14 Desktop toolbar

The toolbar will always be "on-top" and real-time updated. Agents will be able to work in any Windows application and still see the Agent Toolbar.

4.1.4.15 Clientless mode

In the client you may easily change to clientless mode. This function "releases" the client, and the system distributes calls to a new telephone number (often a mobile phone).

Any on-going calls will be transferred from the client over to the number specified by the Agent when switching over to the clientless mode.
When you want to activate the client again, simply unmark "Clientless mode" in the drop down menu. See the Enterprise Agent Phone Client section for more details.

4.1.4.16Case Preview

It is possible to preview a case in the queue without the need to book the case for the agent. A dispatcher can preview all the e-mails in queue in order to decide which should be sent to other Services, which cases should be closed without handling and which cases that should remain in queue to be handled by an agent.

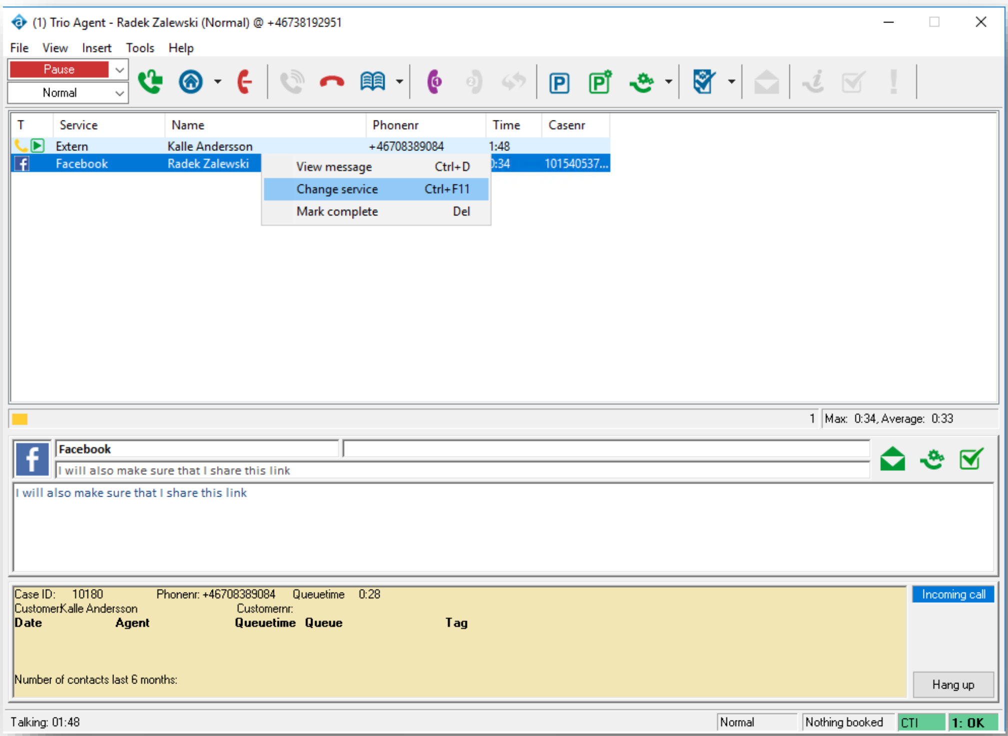
While using the arrows the agent can choose what case to preview in the queue list. The text (1000 first sign if mail and tasks and 140 first characters for Twitter and Facebook) in the case will be shown in the preview list.

Agents can:

- Select to view case
- Close the case
    - It is possible to regret closing the case. To regret is possible to do 60 seconds after the case was closed.
- Transfer the case to another Service

And of course the usually options:

- Let the case remain in queue
- Book the case for themselves



It is possible for the agent to have an active case, for example a call or chat and at the same time preview and dispatch cases from the queue list.

Case types supported are E-mail, Advanced Task, Twitter and Facebook.

When an agent previews a case, the statistics will show a Zero case time for that preview, so for example a dispatcher that previews a lot of cases can get a low average handling time.

The Preview function is available in Agent Client (not Attendant).

4.1.4.17Enterprise Agent address books

In Enterprise Agent you can search in the agent list, and connect calls or send messages.
It is possible to add custom address books, by default up to 10 such lists are available.
The custom address books are based on tab or space separated textiles that can be exported from different systems, but default the following columns are supported :
First name, Surname, Company, Phone, Mobile Phone and e-mail. Additionally every such address book can contain up to 3 different custom columns that can be named by the customer according to their wishes.
These custom columns can be used to store customer ids or any other information that the agents might need.

4.1.4.18Access to the Enghouse Trio server

The Trio Agent client do not need to be part of the same domain as the Enghouse Trio Server. The different configuration templates, such as format for the campaign/call me back results and e-mail templates are distributed in a way that no longer depends on the domain membership. This is obtained by usage of a web service that transfers the files over simple web interface.
Automatic update of the client is also taking benefits from the web service, this leads to a simplified deployment and patch handling.
The access to the Enghouse Trio server is this way “limited” and is made more suitable for hosted deployments.

4.1.5 Working As Agent- Skype for Business

Enghouse Trio support a feature called Working as Agent. When an agent logs in, is set in ready or paused and opens the private queue and have the following configuration:

- an extension in TE
- a SIP URI in TE
- the setting “Bind the number to the agent’s personal queue” activated

the presence state of the agent is set to “Working as Agent”. While an Agent is in this presence state, all personal calls to the agent (extension) will be routed to Enghouse Trio and into the Agents personal queue.

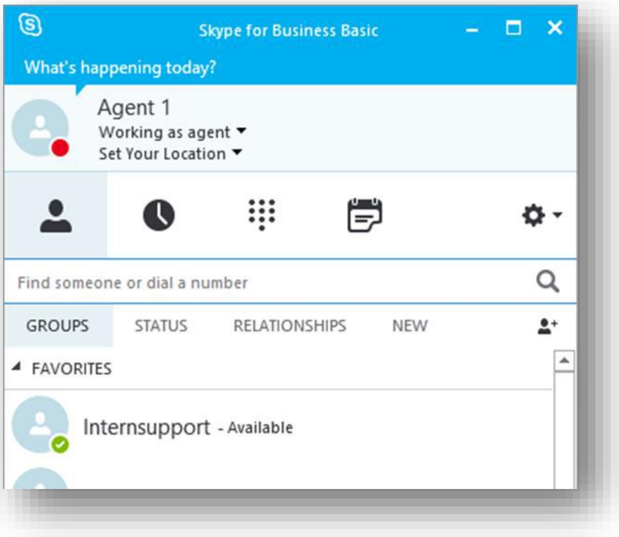
This enables private callers to benefit from Private queue features such as:

- Call blending of Service calls and private calls
- In queue messages
- Spoken presence
- Possiblity to transfer to collegues
- Custom IVR features
- Statistics

For agents using the Enterprise Attendant Client this means that “private” calls from collegues using their Skype client to search for and call the agent, will be routed to Enghouse Trio and put in queue. This way the agent will not be disturb and able to work with the cases in the correct order.

4.1.5.1 How does it work

When the agent logs in to the Enghouse Trio Agent/Attendant Client the Skype for Business status will be set to ”Working as agent”.



Different settings:

- Disabled - No WorkingAsAgent functionality
- ShowBusy - The user is set as Busy and text is set to “Working as Agent”
- ShowPresence - If the user changes the state TE will publish the same state, but with the 'Working as agent' text. If the state is changed automatically, e.g. because of a call, TE will not publish anything new. In addition no presence will be published for Do not disturb or Off work, but these really should not be set while working as an agent.
- ShowNoPresence - TE will not publish any presence at all

In all cases the calls will be redirected to the agents private queue except of when it has been disabled.

4.1.5.2 Requirements

Enterprise Phone Agent Client (Art.No. TRIO-P011110)

Enterprise Agent Attendant Client (Art.No. P011210)

4.1.6 Supervisor functionality/Login Logout Agents

If the agent has supervisor rights he/she will be able to login/logout and change roles on other agents.

To get supervisor rights the right for “open/close service” has to be checked in the CC-Admin for that specific agent.

In the Agents window there will be a new set of choices available:

- Log out
- Set Role
- Login and set ready

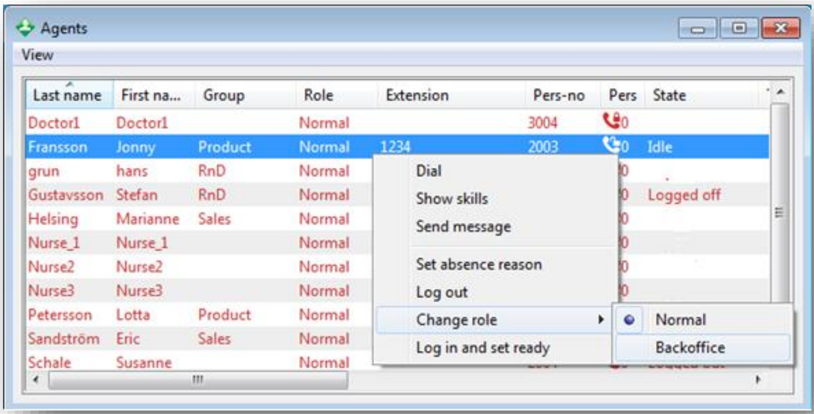
Logout:

If an agent has forgotten to log out/close the application the supervisor can log out the agent and release the license.

- Warning is given if it causes low staffing
- The license is returned
- The destination agent is informed

Set role:

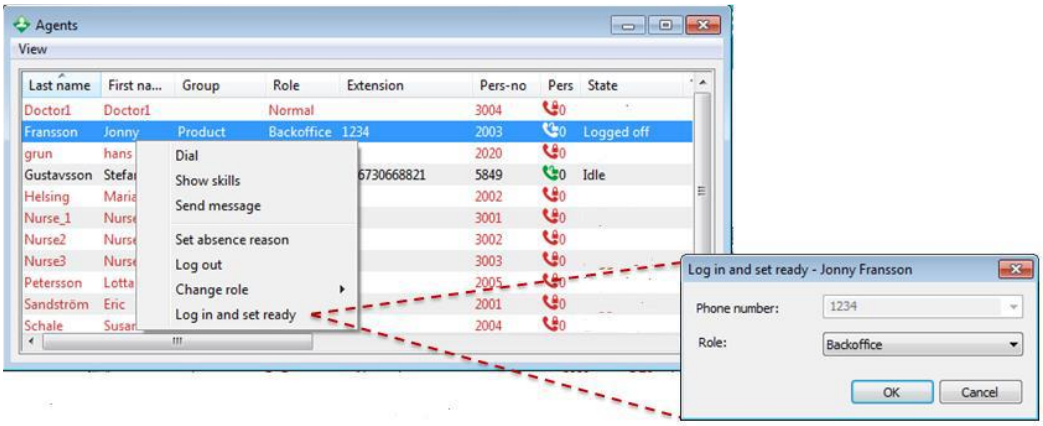
Change the role of a logged in client. The available roles for that specific agent will be presented.



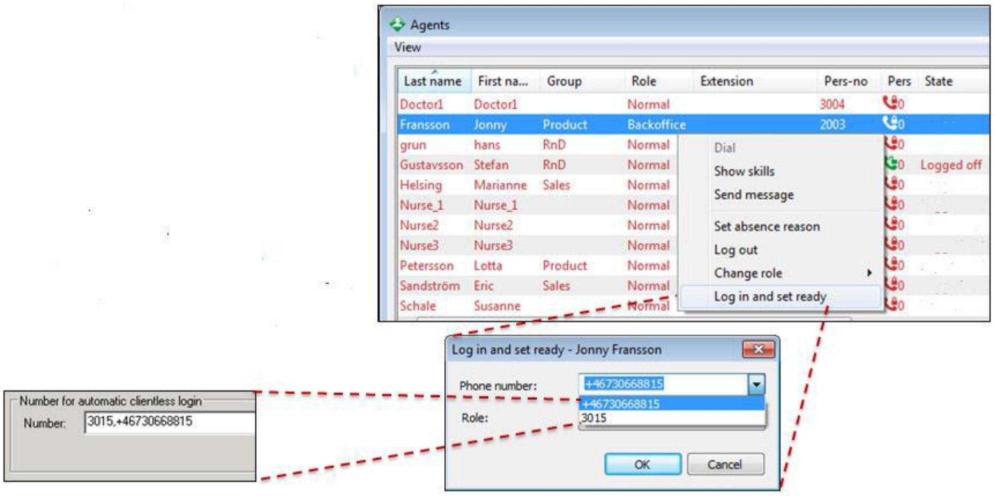
- Warning is given if it causes low staffing
- The destination agent is informed of who did the change and what change was made.

Login and set ready

If the agent is already logged in (attached) the phone number cannot be changed but the role can.



If the agent is logged out, meaning not attached to the system it is possible to login that agent clientless. The supervisor can select the phone number manually or select it from a list that will be populated by the numbers from automatic clientless login.



Note that the Personal Queue is not affected by the supervisor logging on and logging off agents.

4.1.7 Enterprise Attendant

4.1.7.1 Customer benefits

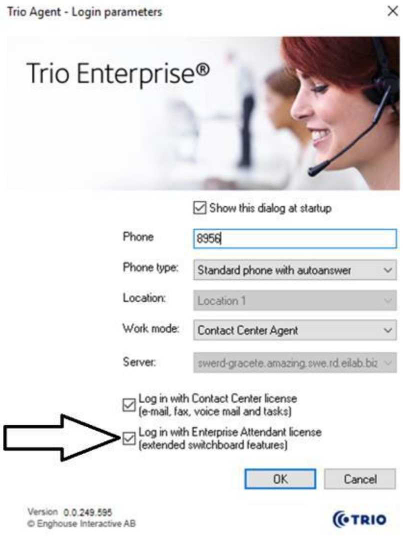
The Enterprise Attendant client provides you with a ”360° view” of your organisation, team members and communications tasks combined with all of the communications tools you need to run your business.

- Powerful Workflow Tools: View mails, participate in chats, prioritise your work items, assign tasks, and collaborate.
- Integrated Desktop Toolbar: Your task queue, status, communications actions, and configurable business information are all available from one single panel.

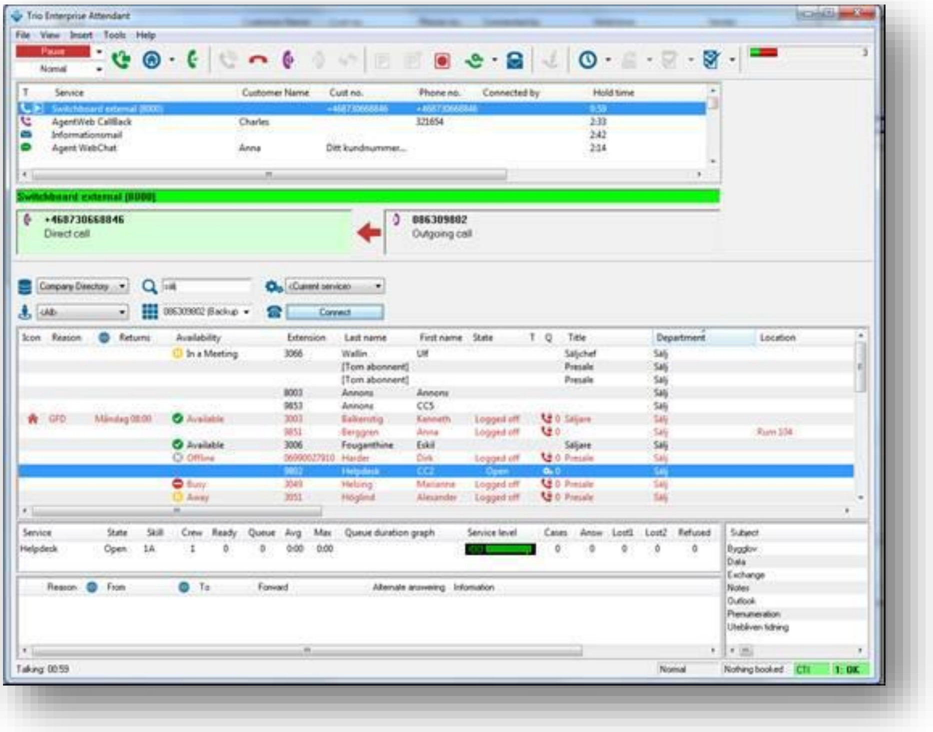
The Enterprise Attendant Client functions as an attendant console. This module adds attendant functionality. The client can be run as a dedicated attendant or as a combined agent and attendant. The attendant service is defined as a service in the contact center, and all queuing functionality is available (see Enterprise Line License for details). You can configure several attendant services in a system, and define which agent should have the attendant skill for which services in the system. Agents that handle calls from the attendant service will have an attendant window that automatically pops up, or have the Enterprise Attendant as the default window, this is defined in the way the user logs in.

4.1.7.2 How does it work?

Enterprise Agent combined with the attendant role will get an Enterprise Attendant window that pops up when attendant calls are answered, or have the Enterprise Attendant as the default window.
The Enterprise Attendant is available when logging on the Enterprise Agent client:



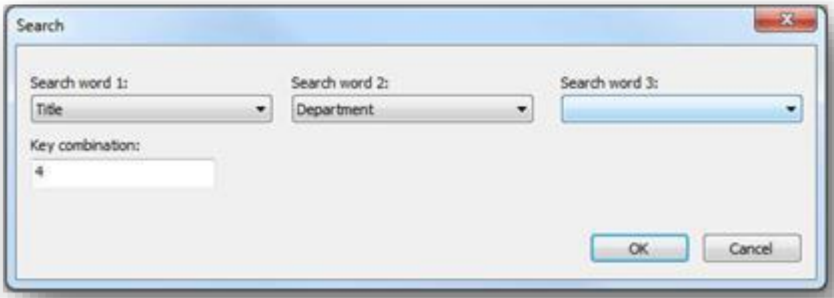
The user can select to work as Switchboard Operator as their primary work mode, this way the Enterprise Attendant opens up as the users primary window.



1. Toolbar
    - Set duty status
    - Close and open the personal queue
    - Sets presence status (sets personal presence events)
    - Answers
    - Hangs up
    - Calls selected, user’s extension or mobile phone
    - Set own absence reason
    - Call 1
    - Call 2
    - Transfers the call
    - Park a call
    - Use system Park
    - Record call
    - Transfers to a service.
    - To voice mail, transfers the call to selected user’s voice mail
    - Transfers case info
    - Sends message, e-mail or SMS. Will open your default e-mail editor, with a predefined template.
    - Create task
    - Aggregated queue status
2. The Queue Preview with the columns defined by the Administrator
3. The service name as named by the Enterprise Agent administrator

4. Left OPI, displays incoming call information, the incoming call information is based on mobile phone number, Microsoft Skype for Business address and also the calling extensions.
5. Right OPI displays outbound calls, you will see the status of the call the moment you connect the call to one of the persons in the Directory.
6. The search field automatically searches for:
   - First name
   - Last name
   - Extension
   - Surname – given name
   - Phonetic search (Soundex)

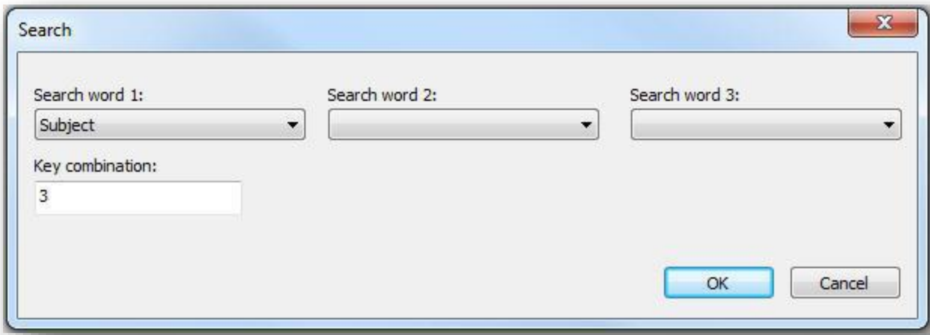
   a. Advanced search, you can combine up to three different search criteria. When you define your search criteria, you also assign the shortcut key that will activate it.



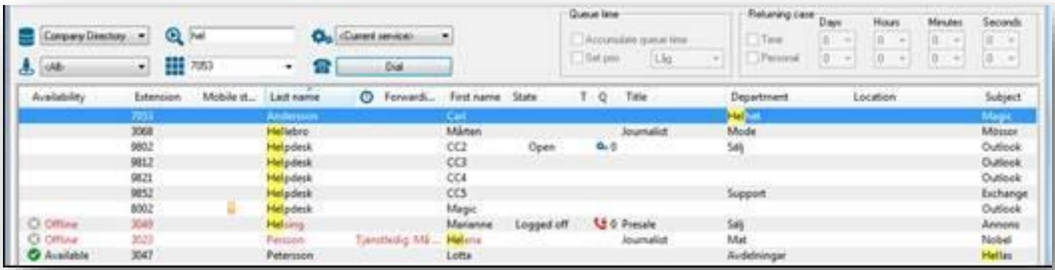
You can select any of the following search criteria:

- First name
- Last name
- Customer group
- E-mail
- Extension
- Extension greater or equal to
- Extension less or equal to
- Mobile phone
- Department
- Pager
- Location
- Standard search
- Skill/Subject
- Title
- User ID
- Other (free text field)
- Other hidden (free text field, only visible to attendants or administrators)
- Extra field 1-20 (customer defined fields, used in the database. Used for other information, like employee number, home phone, next of kin, private phone etc)

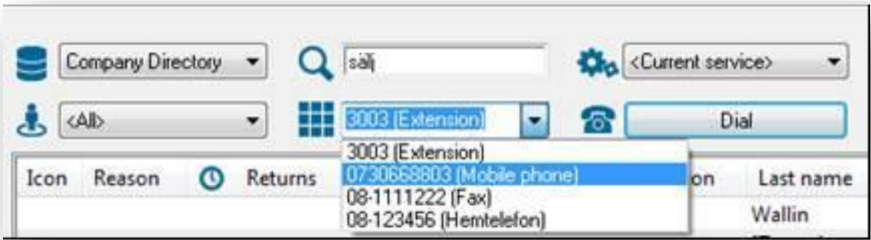
b. Same search – Searches a person subject (task, skill). This can be done by selecting one of the persons in the search result window, then selecting the shortcut key. In this example, the key 4 is used for searching for subject. This is an important feature that keeps the number of shortcut keys to a minimum, and ensures that a search with the same criteria uses the same shortcut key, no matter where you search.



7. It is possible to use predictive search. Default is that after writing 3 characters a search will be made in the database for any match. The matches will be displayed in yellow.



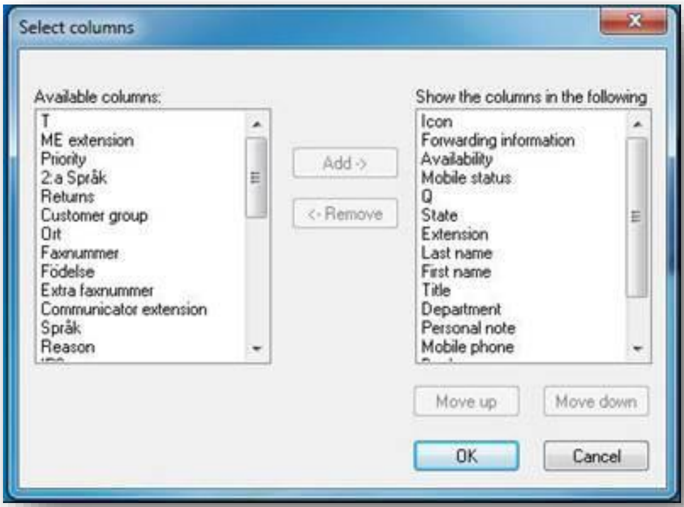
8. Number that can be entered manually for dialling out. The field also contains dialling history, and uses the drop down menu to access one of the 10 last dialled numbers. The number list will show all available number that are visible for a selected person when using the super dial or super connect feature,



9. Enterprise Attendant can have several address lists. The agent list can also be displayed as an address list, attendants can transfer calls to other attendants and agents either from the Company Directory or from the Agents list.

10. Customer group is a definition in the Enterprise directory; this is used to assemble groups, transverse of the organisation structure. Attendants or users can be locked to a customer group, this means that the attendant or user can only search within their own, designated customer group.

11. The search result window displays a number of columns. You can choose to show as many columns as you like. If the number of columns exceeds what you can display in the application, a horizontal scrollbar appears so that you can scroll and see all columns. The settings are personal, easy to change and defined for each address list.



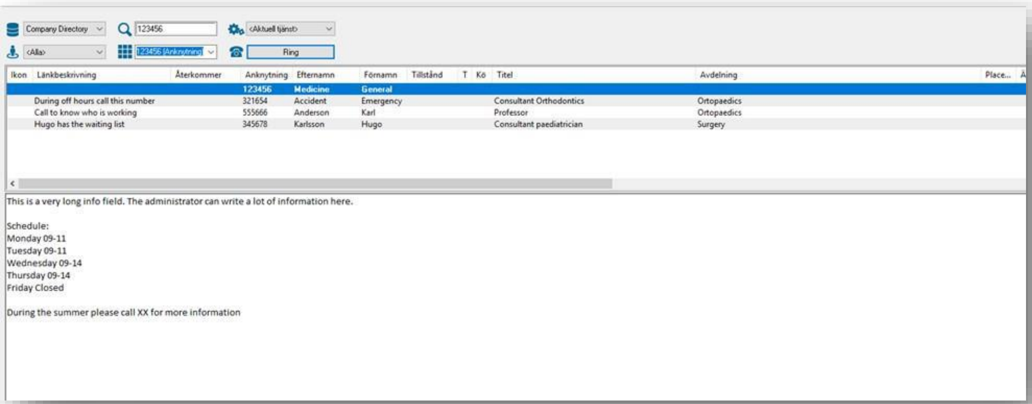
a. You can select from any of the following columns:
   - User ID
   - Present event status icon
   - Presence status code in PBX
   - Presence event return time
   - Presence (Teams, SFB, Cisco) system icon
   - Presence (SFB, Cisco) system personal note
   - Presence (SFB) system location
   - Line status Cisco, Avaya CS1000, Alcatel OXE, Alcatel Open Touch, Broadworks , Mitel MX-One and Hipath
   - First name
   - Last name
   - Customer group
   - E-mail
   - Extension
   - Extension greater or equal to
   - Extension less or equal to
   - Extension state
   - Q – calls queued to that extension (queued by the Trio system)
   - T – Type if the extension is an Agent or Attendant you can see the type of task that is active; call, e-mail, fax etc. Displayed as an icon.
   - Priority
   - Mobile phone
   - Mobile Line status

- Mobile extension (customization)
- Department
- Pager
- Location
- Skills/Subject
- Title
- User ID
- Other (free text field)
- Other hidden (free text field only visible for attendants or administrators)
- Extra field 1-20 (customer defined fields used in the database. Used for other information, like employee number, home phone, next of kin, private phone etc)
- Availability from the Presence system
- Personal Note from the Presence system
- Location from the Presence system (SFB and Cisco Unified Presence)

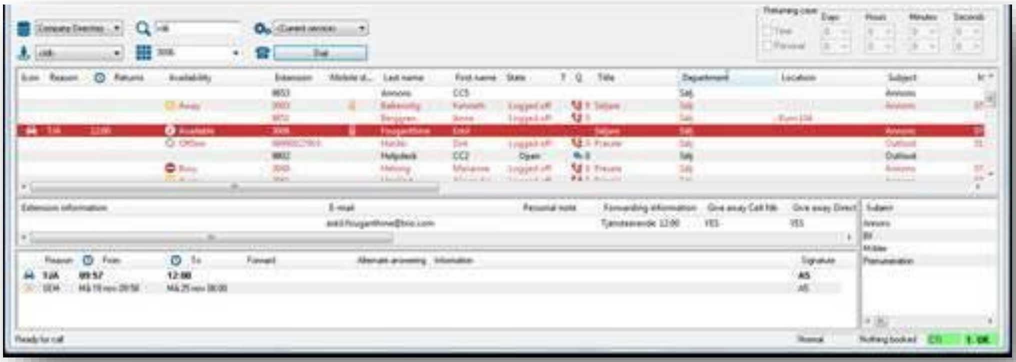
b. From the search result you can select to:

- Send e-mail
- Set presence status in PBX
- Call extension or mobile phone
- Connect caller
- Start IM conversation (SFB)
- Select the person that shall receive the system park message

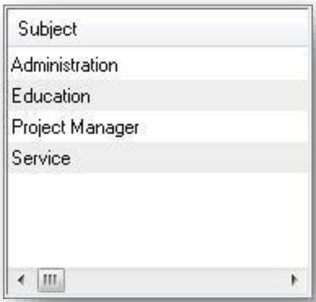
12. User details; this window shows information about the user. The attendant can also select which information is to be displayed in this window. The same options as for selection of columns apply here. These settings are personal too, and will follow the user with their personal account. The options are designed so that each customer can decide which information he/she feels is important, and all information should be available in the same window without opening additional windows.
13. By using the keys Ctrl-D a larger information field will be shown. The field supports callto, http links etc and it is easy to switch back to the "referral" view. In the Trio Administrator program the field is called Subscriber information and it is possible to write upto 10000 characters.



14. A subscriber can have “linked subscribers”. By using Ctrl + right arrow the linked subscriber for the marked subscriber will be shown. The link is made in Trio Administrator where it is also possible to write a text explaning the link.
15. Presence event information. In this window you will see current and future presence events registered for the selected user.

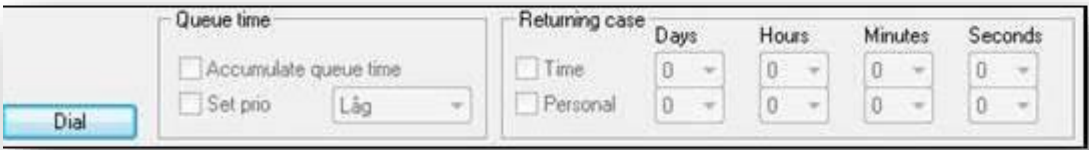


16. Subjects (task, skills) Subjects are shown in a separate window for the selected user in the address book. This window is displayed as a list with a scrollbar, in case the users have more subjects than can be displayed in the window.



17. The switchboard operator can, if configured, have an info field for every extension that is only visible for agents with the switchboard license. The info field is administrated by all the operators and by writing in the field and saving by using ctrl +s the new text will be visible for all operators.

Call and queue Parameters:



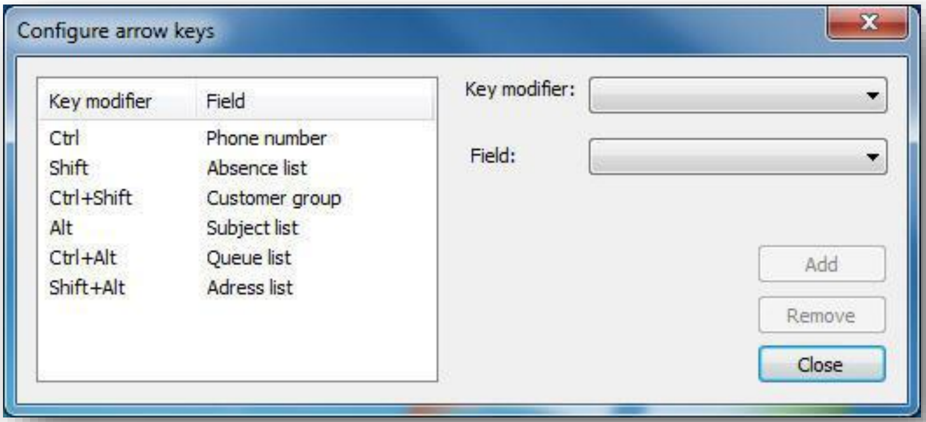
- Queue time parameters
  Higher priority can be set when connecting a call to a personal queue or extension.

  These levels are defined with default parameters for each service, configured in the administrator program.

- Returning case – can be shown or hidden using the file menu.
  To view more details about a caller and be able to see which attendant handled the person earlier, the information is based on the calling number.

Keyboard settings

The functions in the Enterprise Attendant are by default bound to keys on the keyboard to improve the speed working with the advanced console, additional keys has been added enhancing the way the attendant can access the different boxes within the console.



These keys remove the need of using tab to switch between for example the customer group and the queue.

Every user can choose their own settings and the administrator can copy default settings over to other attendants based on a template.

Clear the screen

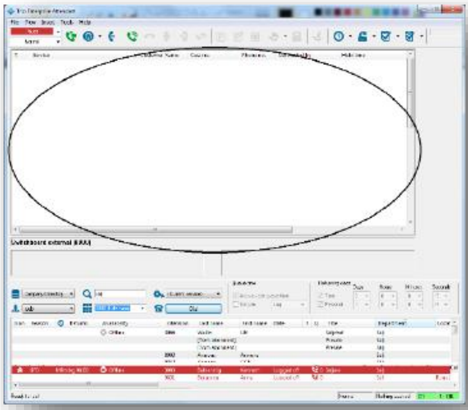
By using SHIFT + ESC the operator can clear the screen from any search result or information in the OPI windows. This is a much requested feature from operators that likes to have a nice and clean screen before answering the next case.

Hide and drag sections

The operator/agent has more possibilities to personalize the Enterprise Attendant by hiding and dragging sections. It is possible to hide the following sections:

Queue list, Case information, Queuetime parameters, Returning case parameters, Department explorer, Information explorer, Desktop toolbar, User details, Absence list, Subject list, Attendant info and Client status.

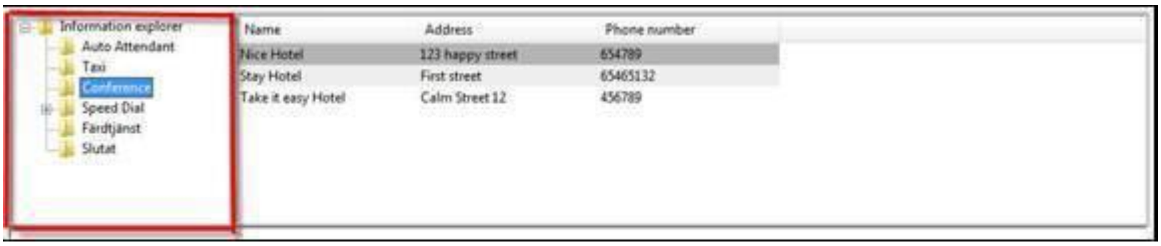
By dragging in the sections the user can make some sections bigger or smaller.



4.1.7.2.1 Department explorer

The attendant can choose to show or hide the department explorer, which can be activated as part of the attendant window. Here the attendant can browse the customer’s departments, in order to facilitate finding the correct person. Keyboard settings can be made so the attendant from the “search field” directly can make a search in the department explorer.

4.1.7.2.2 Information explorer



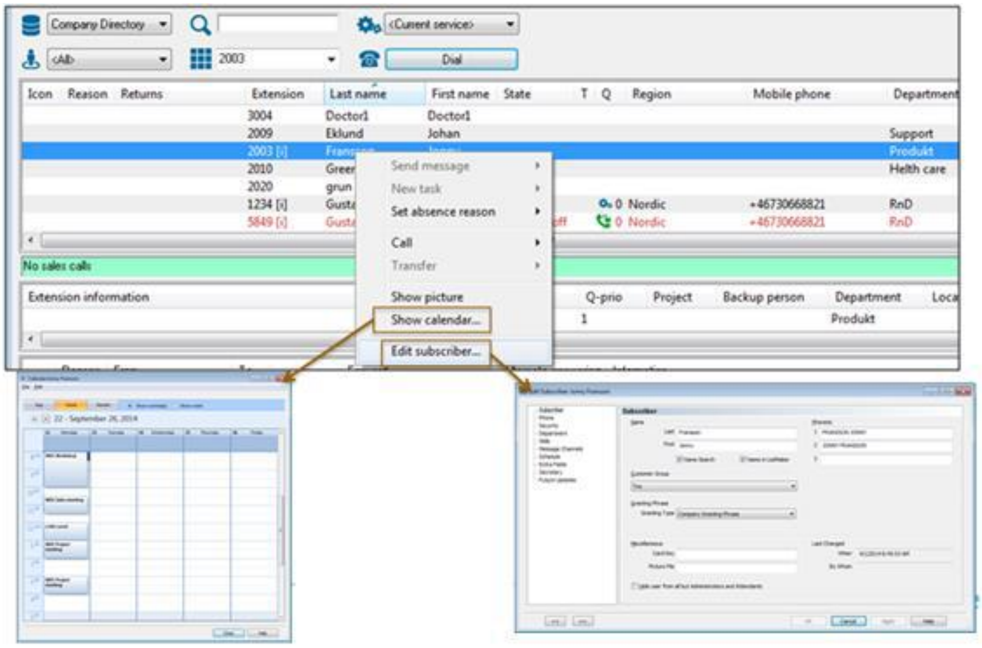
The Attendant can at any time activate the Information Explorer that is normally filled with additional and necessary information by the administrator. Keyboard settings can be made so the attendant from the “search field” directly can make a search in the information explorer.

4.1.7.2.3 Other functionality

An [i] after the extension in the search result will tell if the user has more information in the Attendant field and/or in the Extension information field. The [i] will be a note for the agent/attendant to look further down for more information.

If the agent/attendant has administrator rights it will be possible to from Enterprise Attendant to click on a user in the search result and get directly to that users configuration in the Trio Administrator.

If the agent/attendant has Enterprise Attendant rights she/he will have the possible to click on a user and get the users referral calendar.



4.1.7.2.4 Presence Events

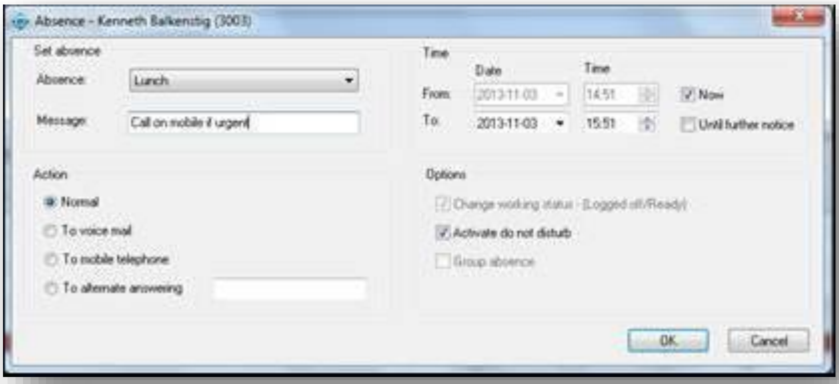
Presence Event information is information about where you are, and when you will be back. The presence event status is usually lunch, meeting, vacation, sick leave, business travel, gone home for the day etc.

- The presence event information can be obtained automatically from your calendar, using the Trio Calendar Connection.
- The Attendant can enter the information for users.
- Call in to Auto Attendant and record your presence event, e.g. “I'm in a meeting and will be back at 15:00”
- You can have scheduled presence events, e.g. “working 90%, and away every Friday”.

When the presence event is active the calls are automatically forwarded to Enterprise Voice Guide or to the Attendant.

From the Enterprise Attendant you can:

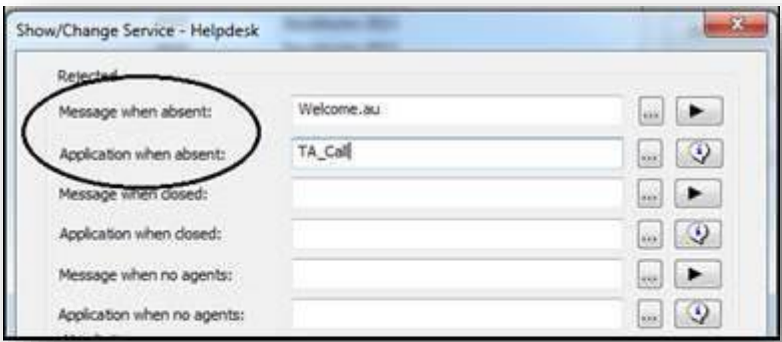
- Enter presence events
- Edit presence events
- Remove presence events



Creation of forwarding

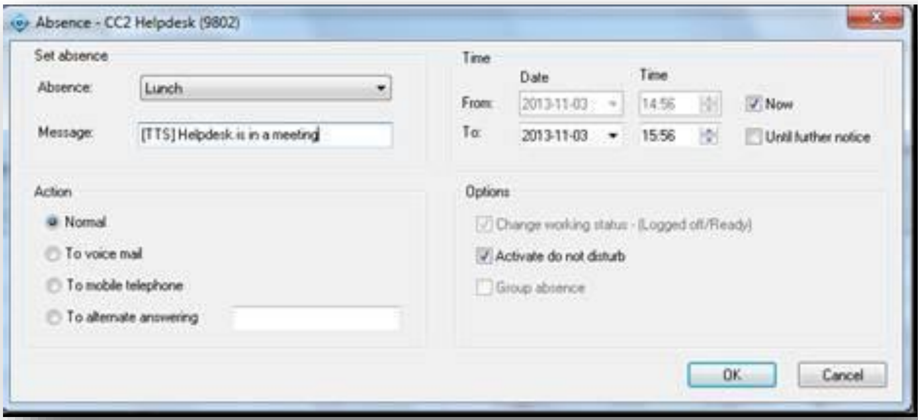
It is also possible to enter presence events on a service in the Enghouse Trio system. The same method is used as for setting a presence event on an extension but there is other options when it comes to a service.

In the Trio Administrator program settings can be made on what the customer wants to happen when a referral is set on a service.



The administrator can configure what phrase is to be played or if an application will start. A common configuration can be to start the VoiceGuide application and then send the caller to the Switchboard service. If nothing special is configured for referrals the ordinary closed message or application will occur.

An operator can when setting the forwarding override the configuration in the Administration program by writing another phrase in the “message” field. If the Trio System has the product Text-to Speech (TTS) the operator can write [TTS] followed by the phrase to be read.

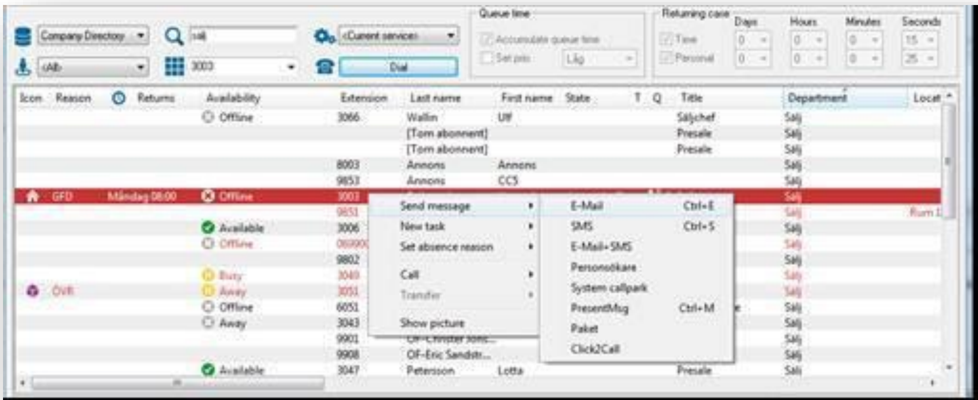


Since it is possible to close and open a service by using referrals, scheduling from Trio Administration or Calendar connection is possible. A service can now close and open several times a day. This function is also very useful for “emergencies”, when you fast have to close a service and send the calls to another destination.

4.1.7.2.5 Sending messages from the Enterprise Attendant

From the client you can send messages to users in the database. The message is sent using e-mail (SMTP) or SMS; users will receive the messages in their default e-mail client, or to their mobile phone as a text message. (SMS service for incoming SMS requires subscription via your mobile operator)

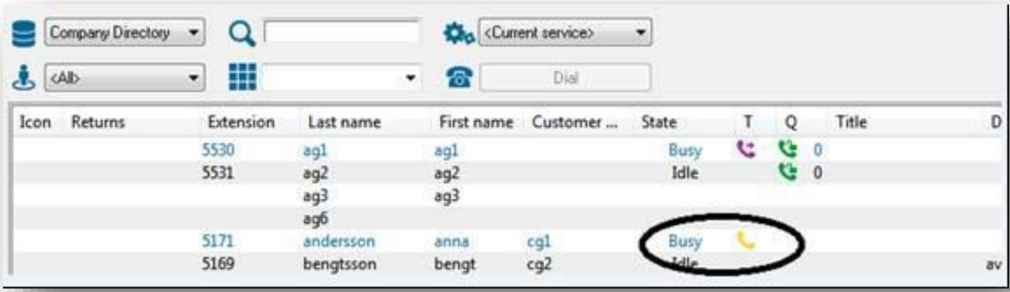
- Message to user or a group of users
- Chat message to attendant
- Chat message to group of attendants
- Chat message to group of attendants, through display menu
- Receive message within the application



The attendant can create different templates that can be used in different situations where the system can pickup calling number, time of call and automatically fill the information in the template.

4.1.7.2.6 Line status

The attendant can in the column “State” see if the extension is busy or not. The attendant doesn’t have to try to connect first to see the status, The line status function works if the pbx is a Cisco, Alcatel (OXE), Alcatel Open Touch, Avaya CS1000, Hipath, Mitel MiCloudor Mitel MX-One.



4.1.7.2.7 Queue handling

- Answers first call queue
    - Manually or automatically
- Answers selected call in queue
    - Only manually

4.1.7.2.8 Call handling

These call handling options are based on a system set up using a system phone, configured with auto answer. For other configurations, these features might differ.

- Connects caller to internal number of searched user
- Connects to optional number
- Connects to busy extension (only one in queue)
- Connects call, with announce call before connecting
- Connects call blind transfer (ring + connect or connect *2)
- Dials out searched user
- Redial
- Dials out, optional number
- Hangs up source
- Hangs up destination
- Toggle source (OPI – Left)
- Toggle destination (OPI – Right)
- Overrides forwarding (does not work in MBN)
- “Barge-in” functionality for SFB. An Attendant can send a second toast to a busy extensions.
- Pop-up function at incoming call or when answering
- Connects directly to users Enterprise Voicemail
- Connects directly to users MBN voice mail (Norway only)
- Queuing to busy (camp on busy, call is returned to operator queue after time out)

- Queue call to internal number
- Queue call to Mobile Extension phone (customization)
- Queue call to MBN phone (Norway only)
- Queue call to external phone

- Connects calls to other attendants
- Queues calls to other attendants (requires a personal queue)
- Connects calls to Trio Services
- Parks call, hold
- Take back a connected call (if the attendant has not been assigned another task)
- Deny a call
- Pickup parked by using a key strike
- Record calls(every inbound call to the service, or attendant activated during call)
- Personal queue (calls are placed in the return queue)

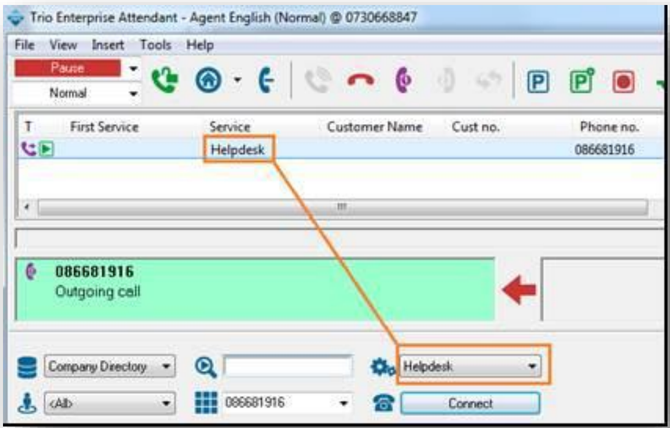
Some of the call handling features NOT handled in this release

- Conference
- Conference set up for internal / external users
- Barge in on an on-going call
  - Here the attendant phone can be used with certain PBXs.
- Busy extension forced callback. (Extension automatically calls attendant back when ready)
- Mute source (the attendant phone shall be used for muting)

A warning message is displayed if you try to log out and you are one of the last attendants.

4.1.7.2.9 Spontaneously calls from agent

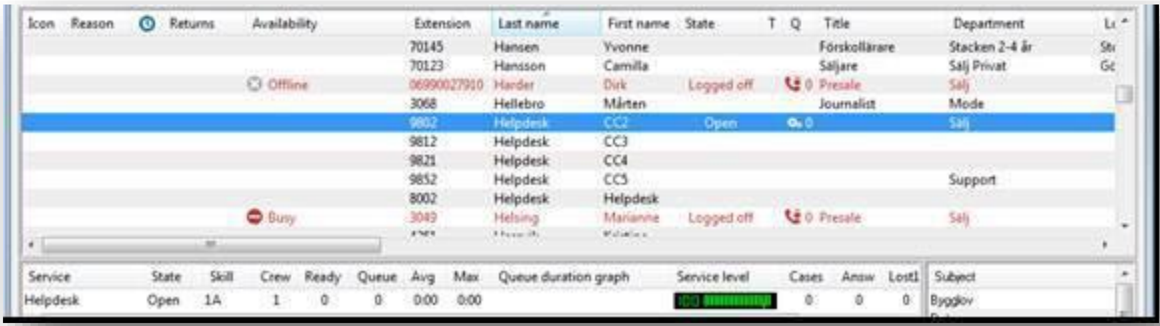
It is possible to choose what A-number will be shown when an agent is making a spontaneously call. By using a drop down menu the agent can choose from different services. The service will be shown in the agent window if it has been configured correctly in Trio Administrator and the agent needs to have a skill on the specific service. It is possible for the agent to “lock” the drop down to a specific service if the agent for example needs to call many outgoing calls and wants to show the same A-number for all of them.



4.1.7.2.10 Searching and connecting calls to services

The Enterprise Attendant is able to search for services based on skills assigned to different services the same way as if the services were end users,

The attendant can see the service status, if it is open or closed and the number of queuing calls.



4.1.7.2.11 Case information

The case information window is displayed in the address book window. Attendants can switch on / off the case information from the Attendant menu.

4.1.7.2.12 System Park

In Enghouse Trio the Attendant can instead of parking the call for themselves use the System park feature, this way the Attendant can give any user the ability to pick up the call by dialling the number that the system uses to park the call.

The system park has a feature that automatically sends a message as for example SMS, E-mail to the, in the company directory, selected person.

This way the attendant can quickly with minimal manual effort send the correct number to the person that has a parked call. Adding the number to the message that is sent as an SMS makes it possible for the receiver to directly pick up the call from their mobile when the number is accessible from the mobile network.

ASCOM pager system can receive pager messages from Trio when it has the ASCOM mailgate product present.

Example of such a message:

Subject: Call waiting. Dial %AP_SystemParkPoolNumber% to pick up the call

Message text:

Call waiting. Dial 1111 to pick up the call from mobile call 084571111

In the message example the 1111 is the number assigned to pick up the call, this number is automatically assigned by the system and can be added to the message.

4.1.8 Enghouse Trio Agent Web

4.1.8.1 Customer benefits

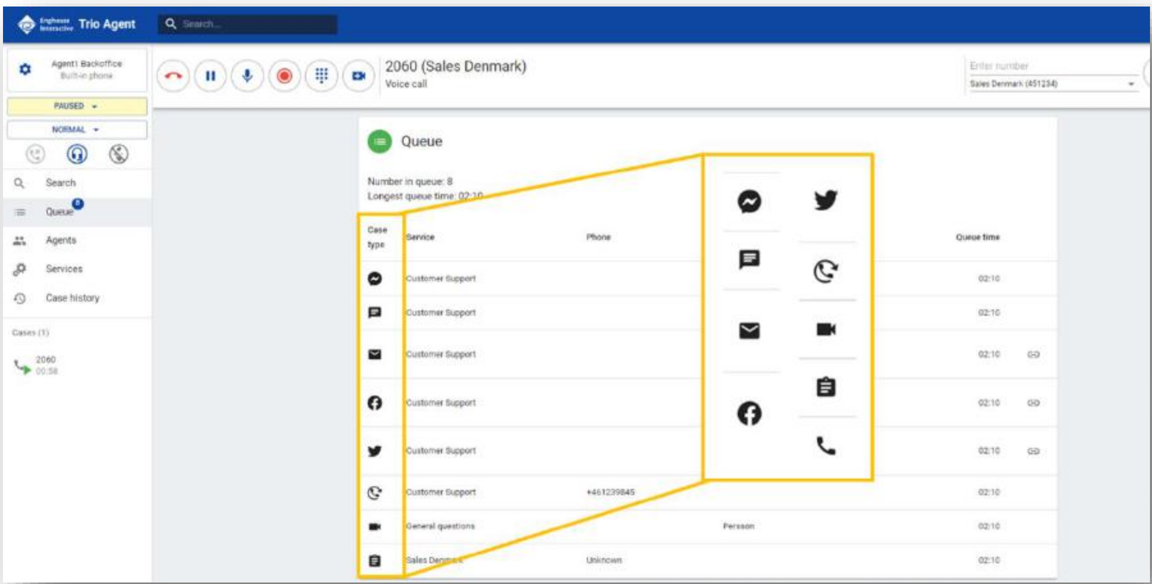
In Enghouse Trio it is easy to get started working as an agent. The Trio Agent Web will be accessible from a web browser anywhere anytime. The Web Agent has a modern userinterface and developed with responsive web technology.

Most common features an agent that are used to work in the Enghouse Trio Agent Attendant consol are available in the Web Agent like changing roles, open close personal queue and open line.

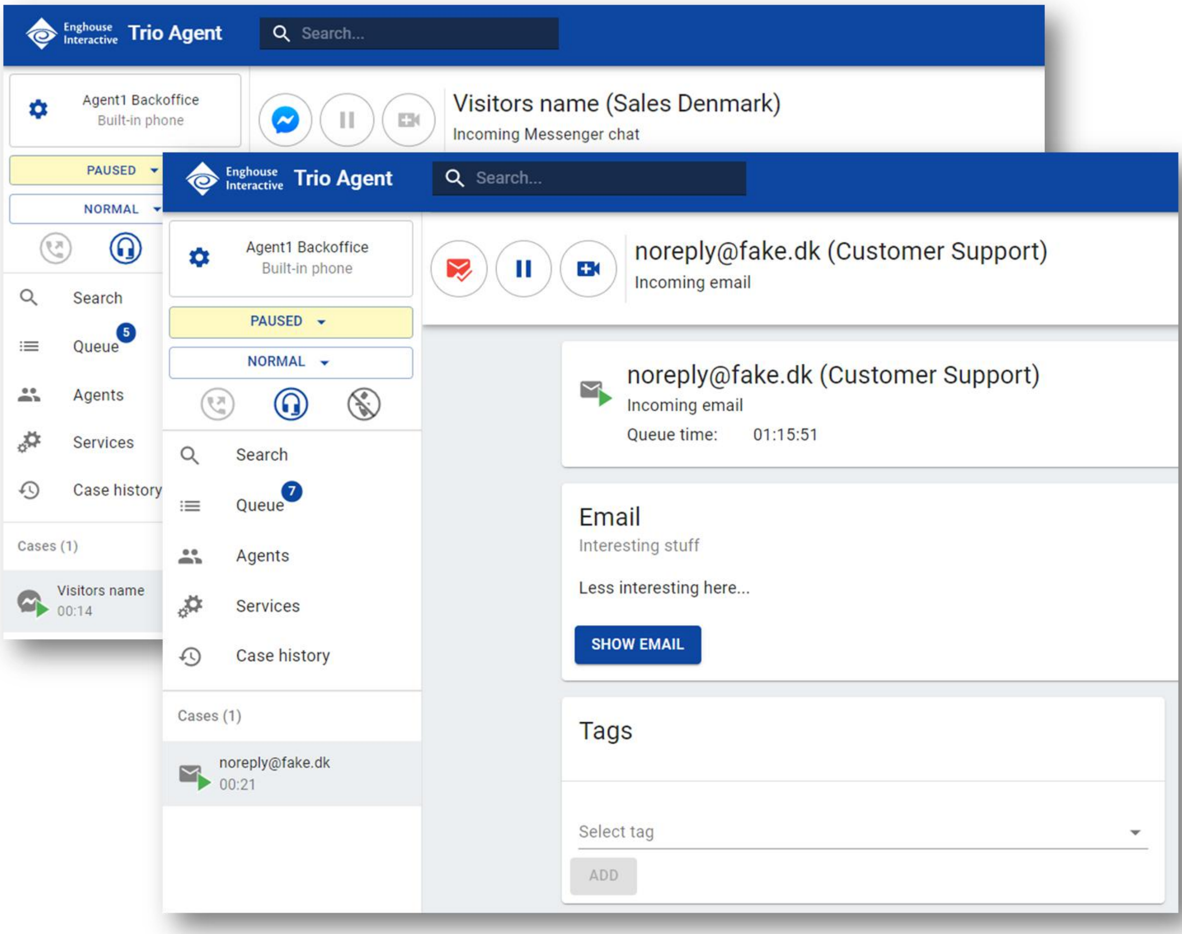
The Agent can see the cases in the queue list, see all the agents in an agent list and all the services in a service list.

The Agent can search in the Company Directory database and see status on the extensions such as presence, line status and referral status.

The Agent will be able to handle calls, Videosessions, callbacks, chat and social media.



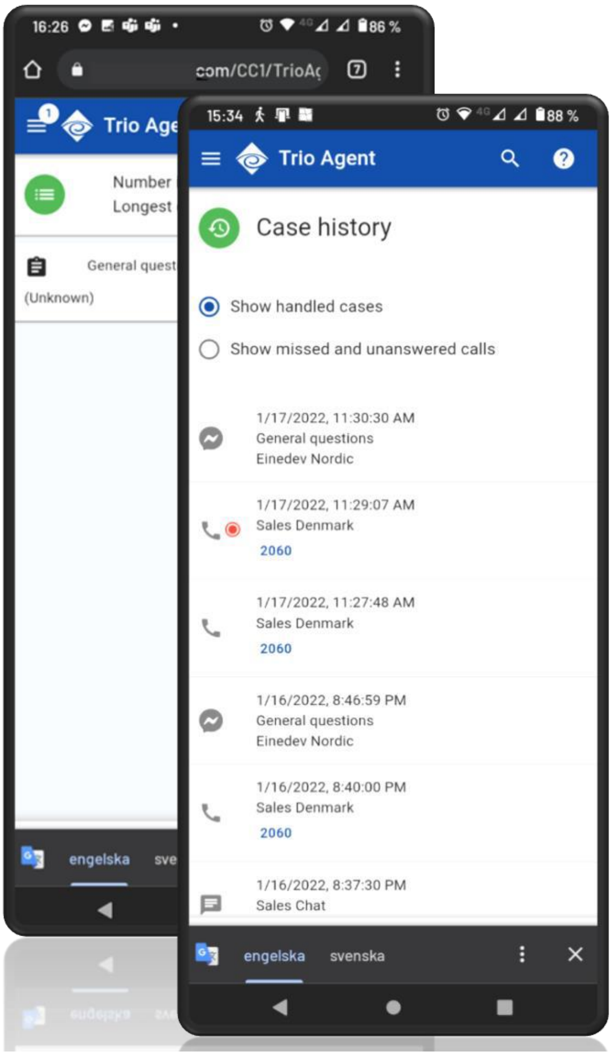
The Trio Agent Web works with any type of phone even has a built-in phone and works well with cloud-based e-mail from Office 365 or Microsoft Dynamics CRM. The same possibilities are there to handle social media such as Facebook or Twitter.



Functionality in is   Trio Agent Web in Enghouse Trio is:

- Answer, transfer and make calls
- E-mail integration with MS Exchange or Office 365
- Facebook and Twitter Integration
- CRM Integration with screen pop of 3rd party
- Select outgoing caller ID based on Services
- Improved searching of Company Directory based on same Skill, Title Organization
- Add Tags (Wrap up codes)
- Add Comments to cases
- Ability initiate Instant Messaging based on presence
- Start and Stop Recording
- Handling of video cases
- Handling Tasks
- Send Messages to addresses in the directory
- Screenpop of external CRM or ticketing systems
- View Case history
- Display custom data fields

The mobile view has beed adapted for non desktop users giving the agent ability to work in a more mobile way.



4.1.8.2 How is it licensed?

One Enterprise Agent Attendant Client Art.No. TRIO-P011210 license per simultaneously logged in Agent is needed, the same license is needed regardless of if the Agent is using a desktop or smartphone.

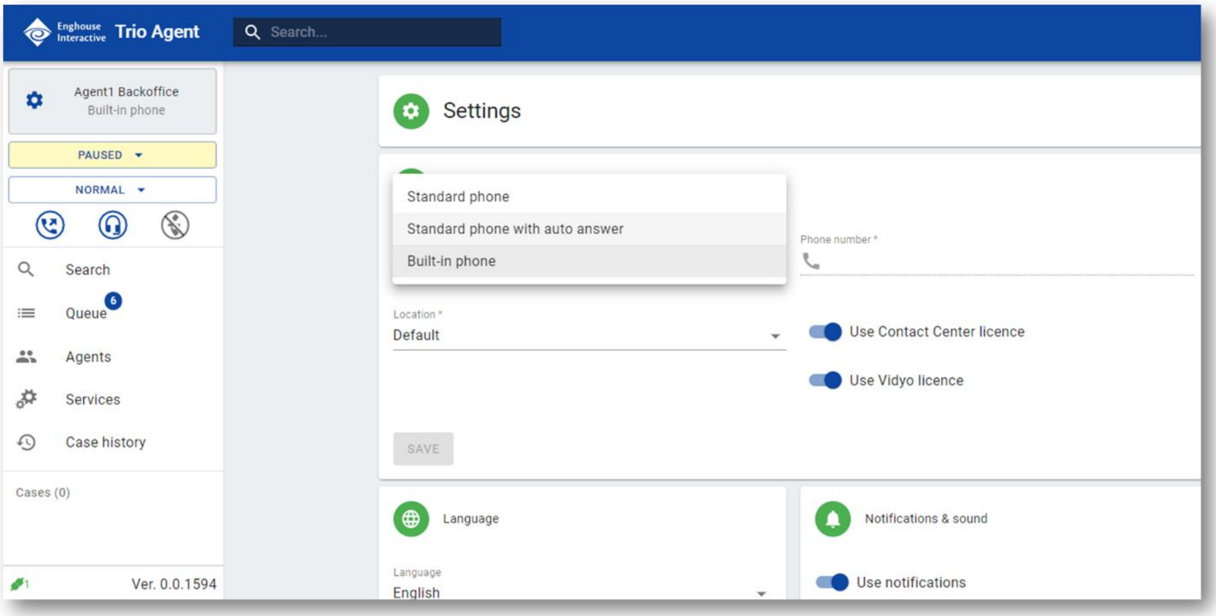
4.1.8.3 Requirements

Enterprise Agent Attendant Client Art.No. TRIO-P011210 to login to the Enghouse Trio Agent Web

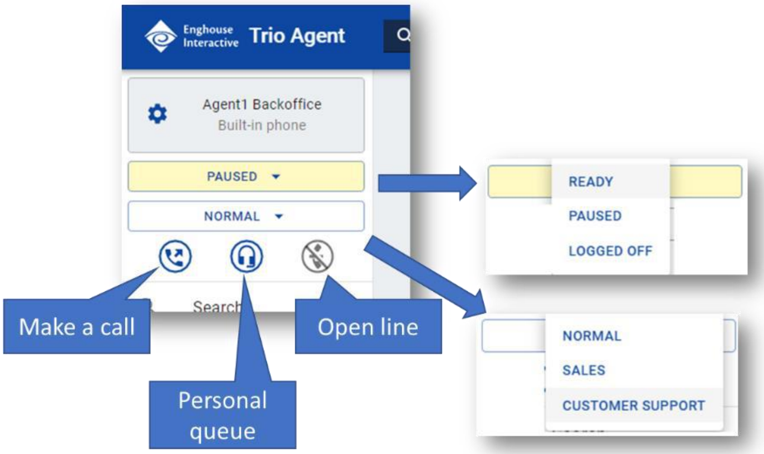
4.1.8.4 How does it work?

The Trio Agent Web will have functionality for an agent/attendant to give excellent customer service to their customers. All the functionality present in the PC based Enghouse Trio Agent/Attendant client will not be available from Trio Agent Web.

An agent/attendant will login using Enghouse Trio single sign on and can use settings to change answering extension, language etc.



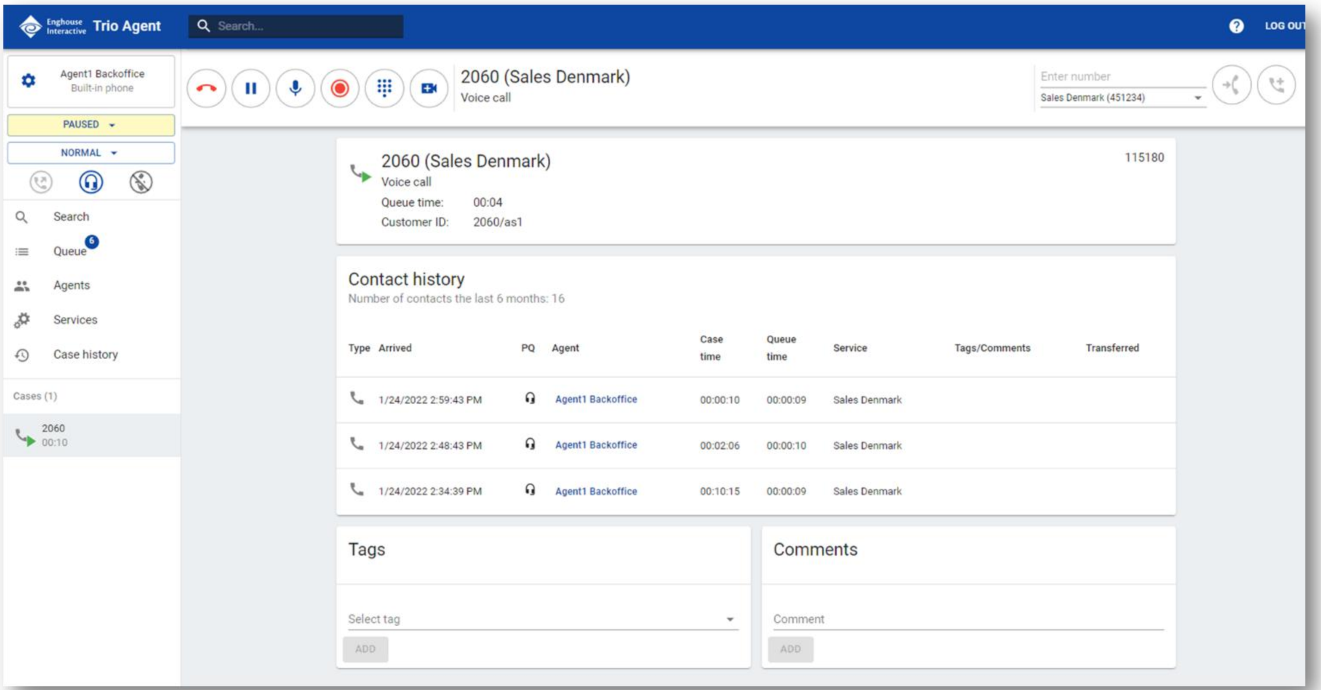
It is possible to change status (Ready, Pause, Logged out) and to change roles that changes the skillset. Possibilities to set if the personal queue will be opened or closed and if open line will be used is also possible.



The agent/attendant will have different views

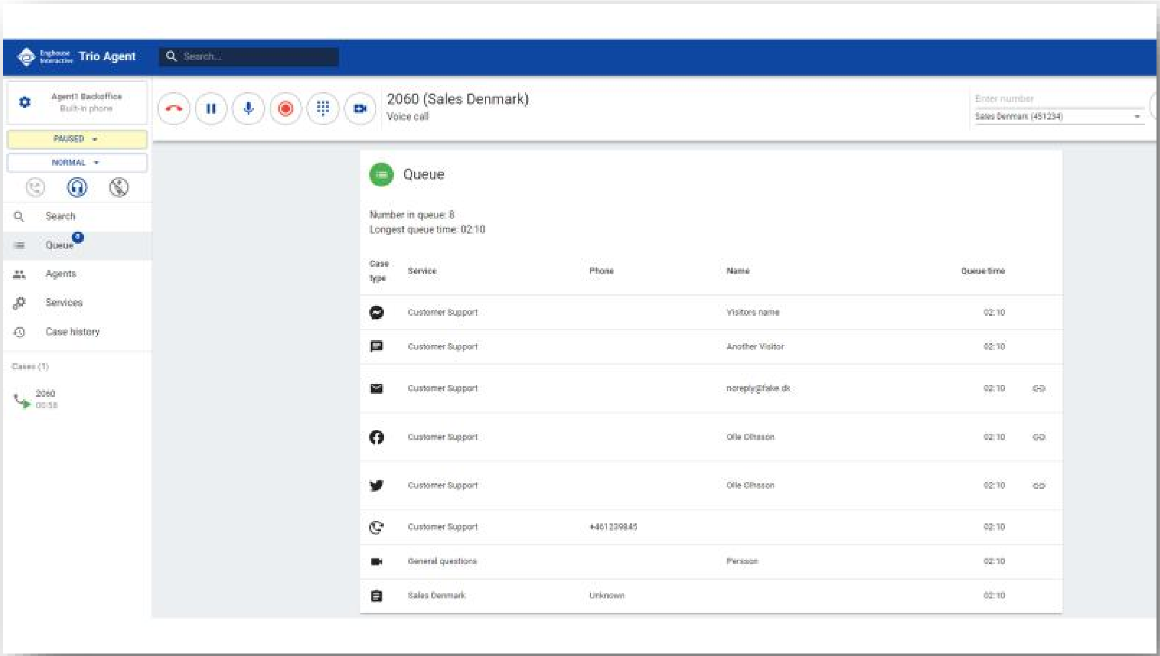
A case view where information about the ongoing case is displayed. The agent/attendant will see who is calling, if it is a direct call or returning etc. The three last contacts will be shown and by an easy click the case can be transferred to another agent.

In the case view the Agent can add wrapup codes, see case parameters that wre set based on information from the CRM or in IVR.

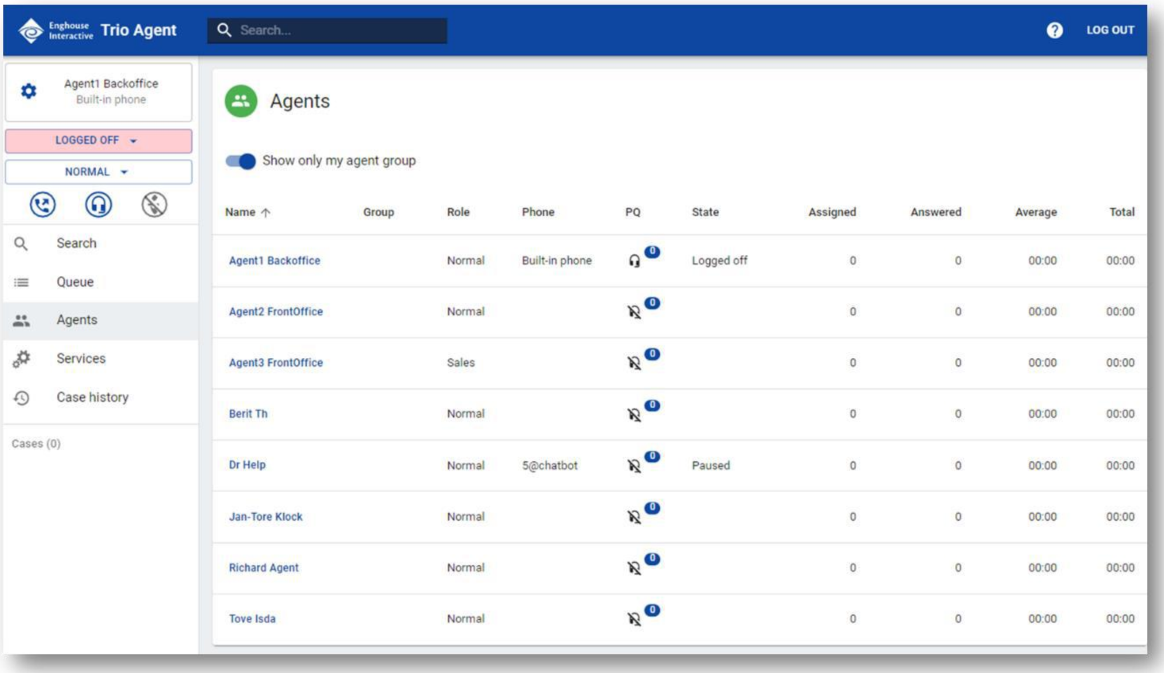


Above the version displaying desktop agent view.

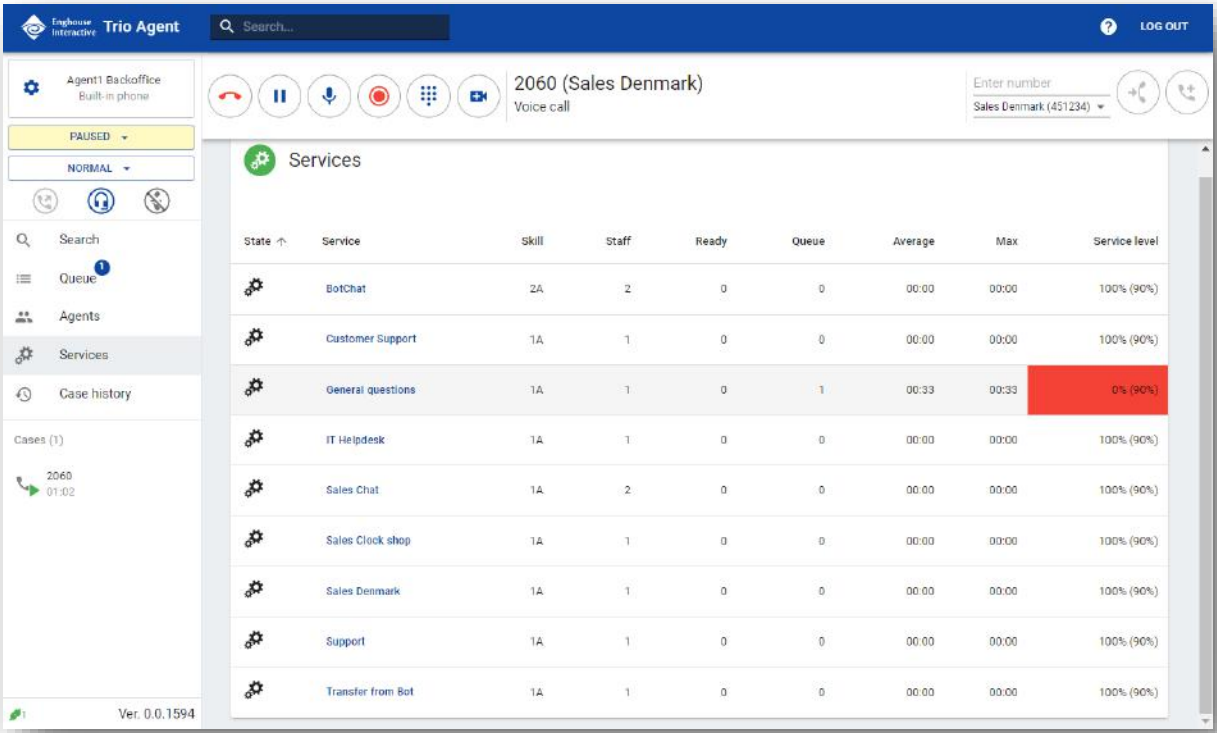
A queue list to see all the cases in the queue. The Agent/Attendant will see the cases he/she has competence to answer.



An agent list to see the other agents and their status. The status of the other agents is shown, if the agents personal queue is opened or closed and how many cases are in the queue for the agents. Some statiscs are also shown, for example how many cases the agents have been working on. With a click it is easy to connect to the agents.



A Service list to see all the service and their status. The status of the services are shown and if the SLA is reach or not. With a click it is easy to connect a case to a service.



4.1.8.4.1 Mobile view

Certain functions in the Trio Agent Web are not available in the mobile view, these are:

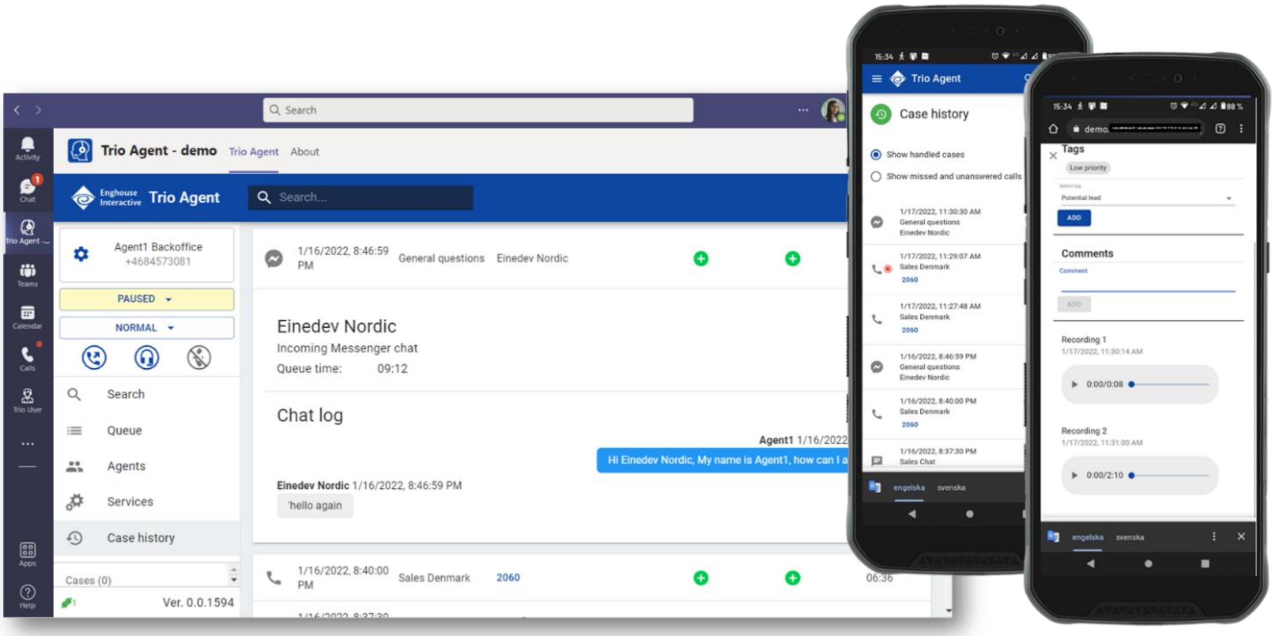
CRM-Pop, Facebook, Twitter or other chat cases.

Built-in phone is only available on desktop.

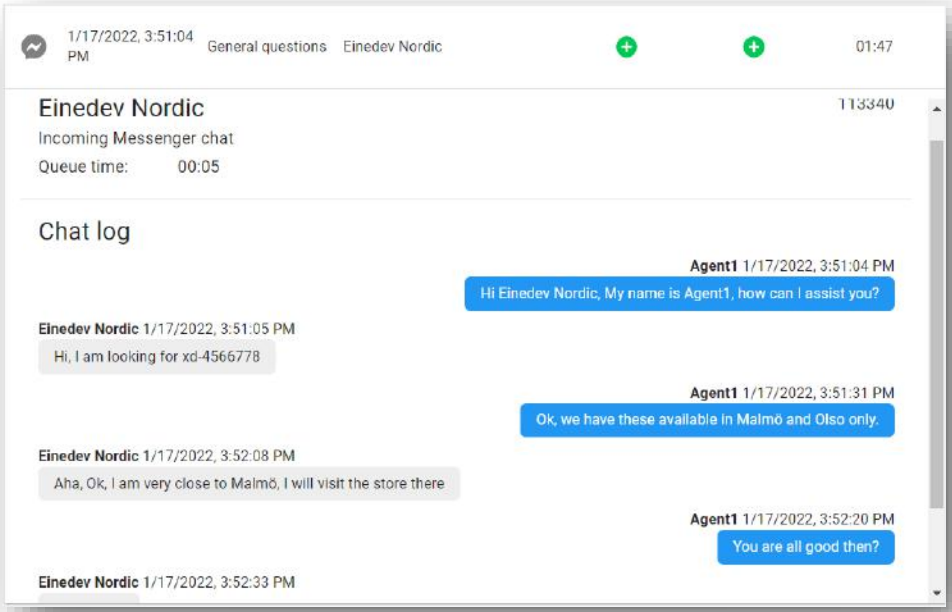
4.1.8.5 Case history in Trio Agent Web

As an Agent it is often important to work with historical cases, in some situation one need to go back, add additional comments, call the customer or listen to the specific recording.

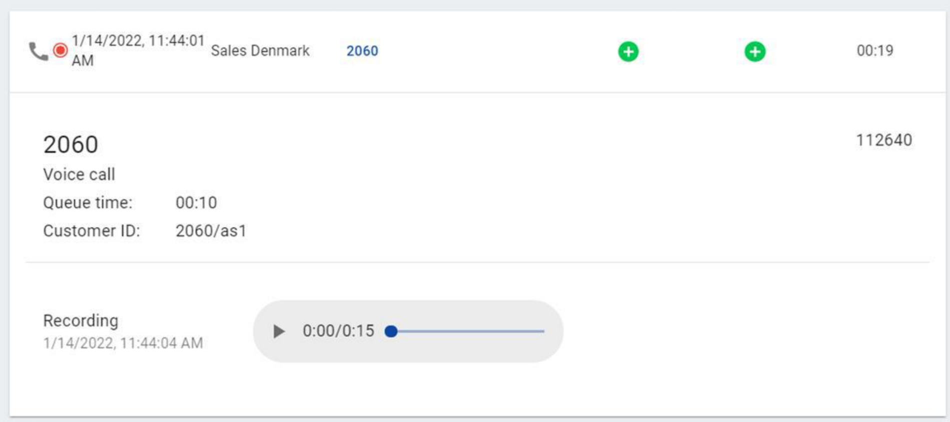
In Trio 9.1 the case history is available in both the desktop and mobile view.



- Case history displays 20 case per view
    - Bring next loads more cases, (up to 200)
    - Data is picked from current database, so if you work once a month and take 10 cases per occasion some ols cases are not available for review
- **Agents can handle many things in the case history:**
    - **Make calls** to numbers
    - view **chatlogs** (Web chat and Facebook Messenger)



- **Play back** Trio Recorded calls (QMS link to recording to play back if recorded with QMS)

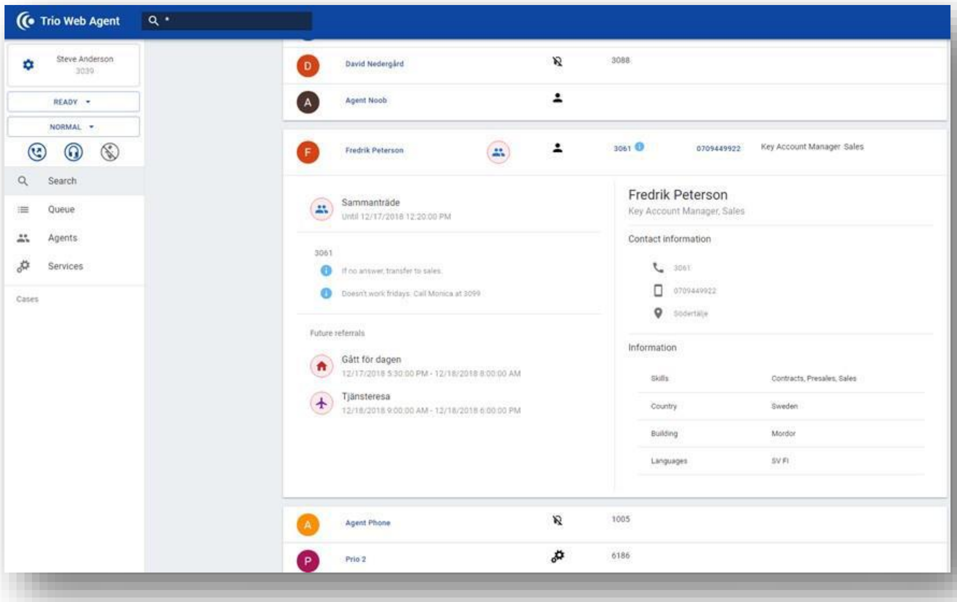


- Add **tags and comments** to cases
- **Email**, **Facebook post**, **Twitter message**:
  - The first 100 characters of the subject of the email or the first 140 characters of the message from Facebook or Twitter.
  - a button to open the message on **Facebook, Twitter or in the Office365 mail.**

This gives the agent a more direct view of their history without the need to log in to Trio Statistics.

4.1.8.6 A Search view to search in the company directory.

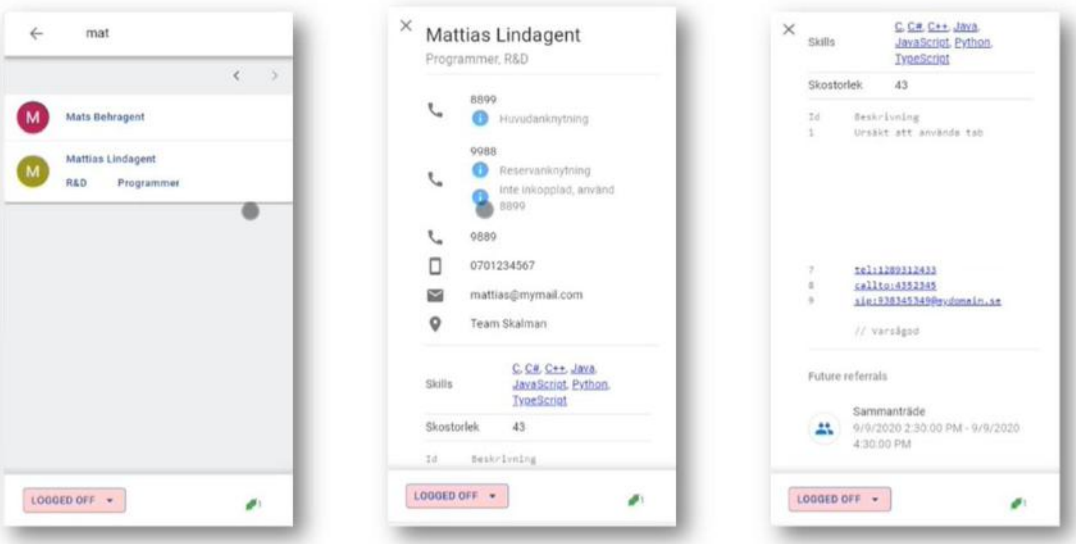
The agent/attendant can reach the search by searching in the search textbox that is present in every view. The search is the same as in Trio User, a multifield search in the different categories present in the Company Directory database. To be able to see more about a subscriber just click on the picture or use the space-key and the info will fold down. All the extension number are clickable in order to transfer the calls and the status of the subscribers, such as referral, presence mobile and line status, are clearly shown.



From Trio 9.2 Agents can narrow down searches based on customer groups, a nice feature is the ability to select multiple groups

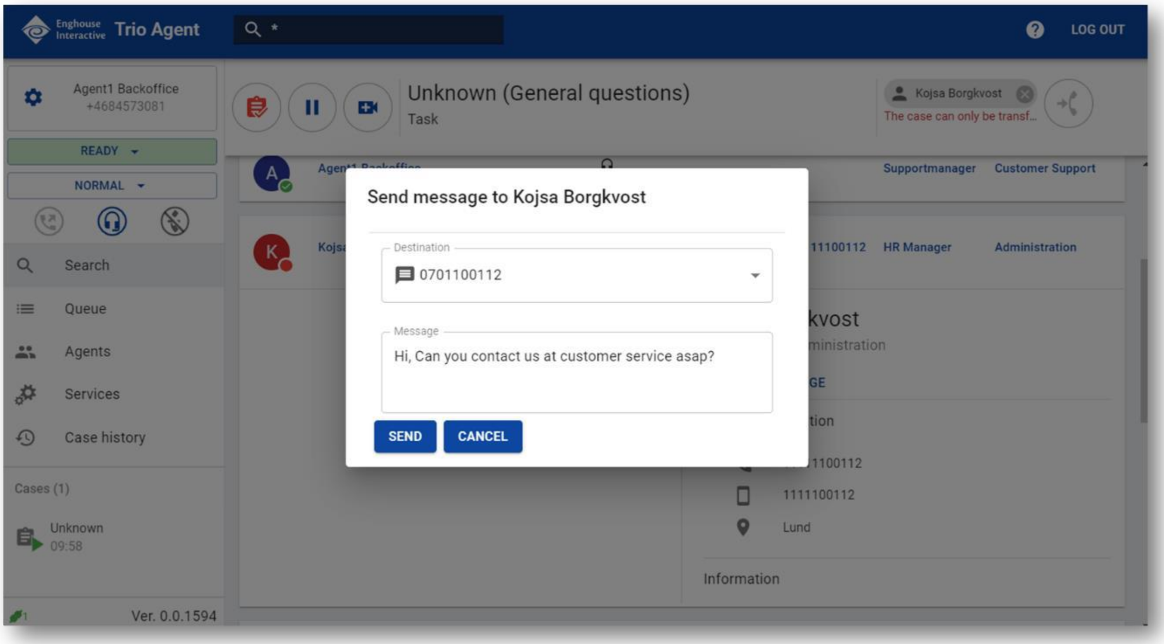
In the detailed view the Agent can search for the same keywords, same department, same title to better organize the results.

The Agent in the mobile view has also an amrtphone adapted overview

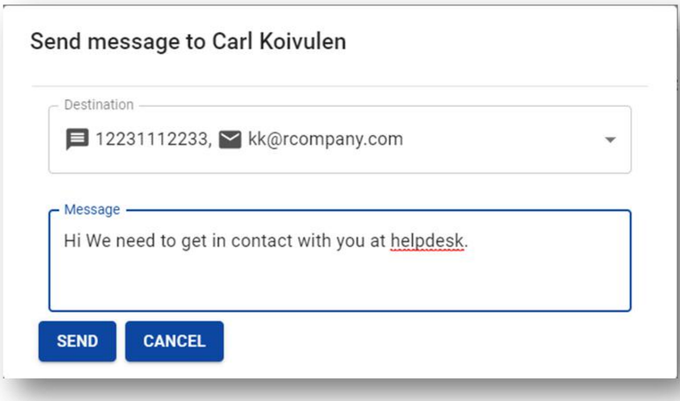


4.1.8.7 Send messages from Trio Agent Web

Working with Trio Agent the user can send messages via various channels, this can be SMS, e-mail or even pagers.



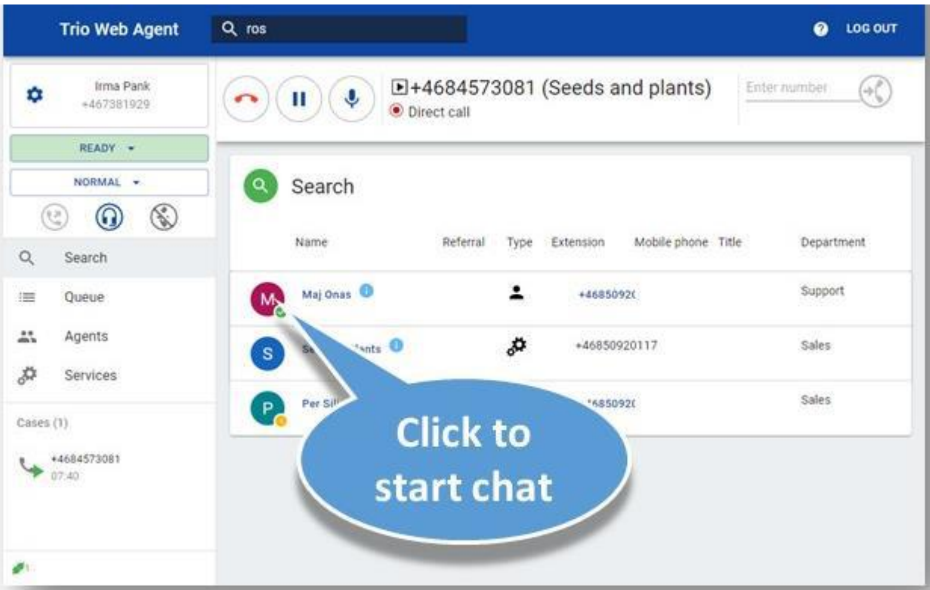
Agents can select to send a message to different channels based on what is available for a specific directory entrance.



In health care, this functionality is extremely important, therefore the possibility of sending messages to people in the address book has been added.

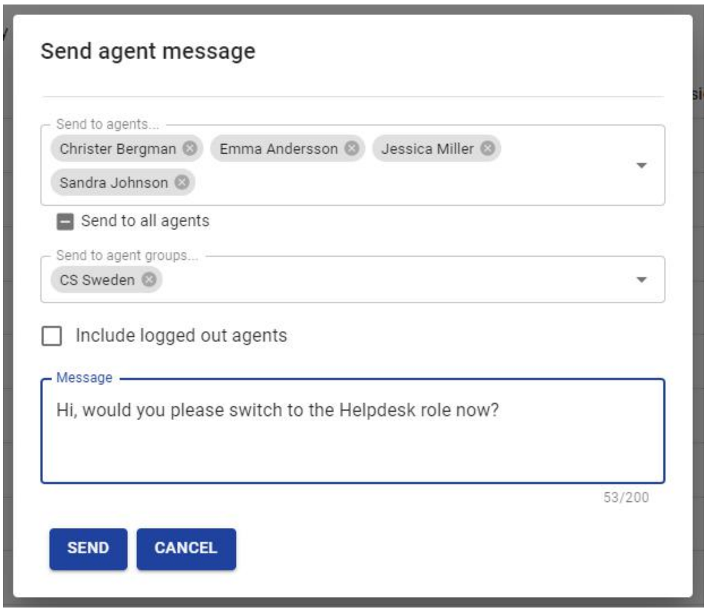
4.1.8.8 Initiate Instant messaging

The Agent can initiate instant messaging sessions by clicking on a persons “avatar” if presence is available, this way a Skype for Business or Microsft Teams chat will be enabled.



4.1.8.9 Send messages between agents

The agents can send short text messages to each other directly in Trio Agent. A message can be sent to one or more agents and/or agent groups. The sender can decide if the message is sent only to agents that are currently logged in, or if it should be delivered to logged out agents the next time they log in.



Agents that receive a message can easily reply to the sender.

Agents who use a smartphone can receive and reply to messages, but not send new ones.

4.1.8.10Supervisor listen in and coaching

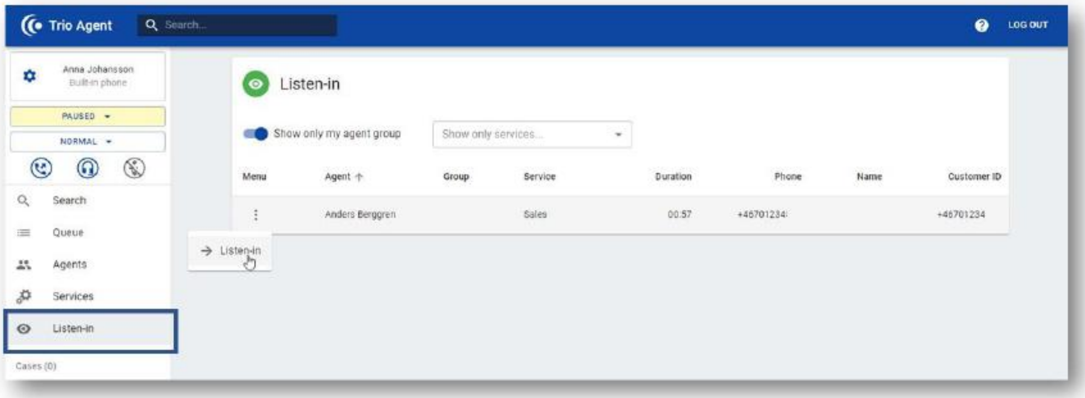
Previously the coach or supervisor could evaluate recorded calls and send feedback to the agents. When the teams are spread out it is more important than ever that you as a supervisor/team leader can remotely support your agents by listening in to their calls, in the background coach the agent through the dialog.

For agents it is important to have the ability to invite a supervisor or a team leader to assist them in call, when assistance is needed. Especially when working at different locations, when the physical participation is not possible.

The person working as supervisor or coach has been given new possibilities in the Trio Agent Web with the added coaching ability.

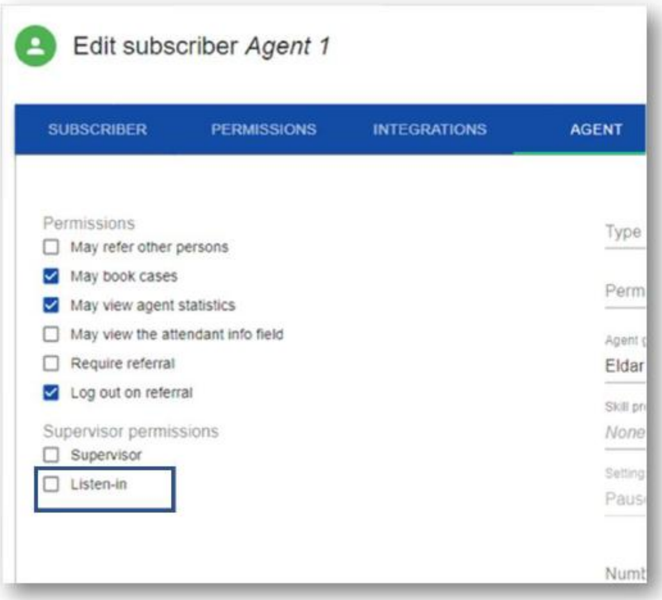
4.1.8.10.1 The supervisor view

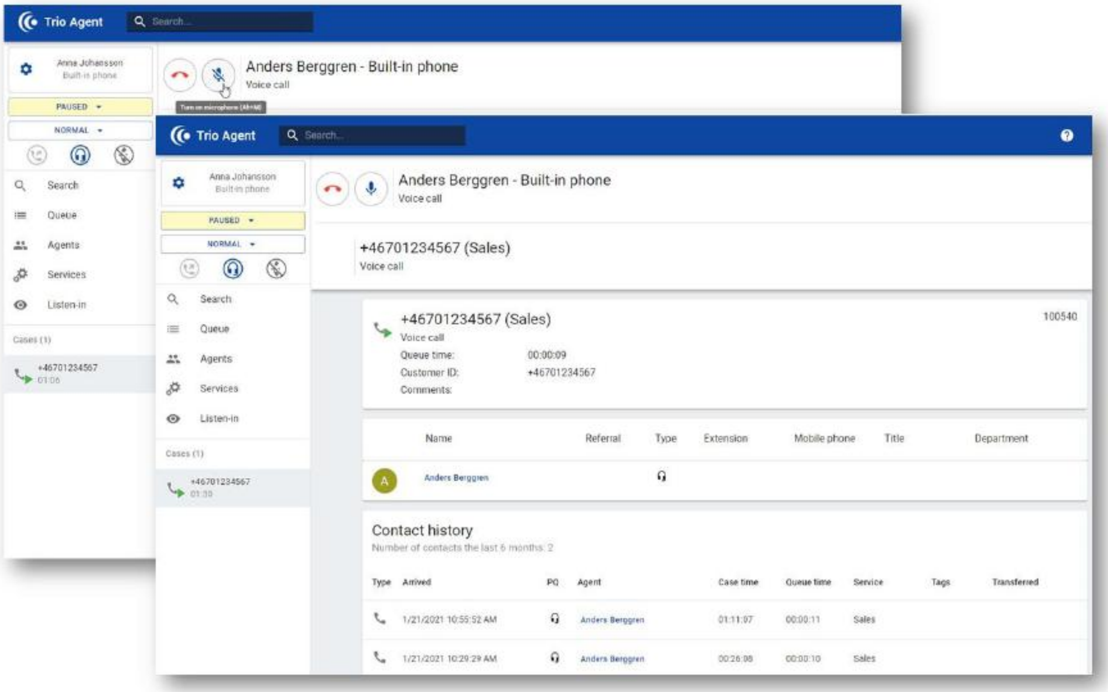
A coach/agent, with the right permission, can clearly see what agents have active calls in the Trio Agent Web.



A new menu item is available displaying the list of calls the supervisor can listen into and coach.

The supervisor needs to have a certain right to listen-in to calls. This means that a non-supervisor agent can listen to other agents calls for educational purposes.





The view when coach is connected to the agent’s call is like what the agent sees, with some additions and limitations.

In the supervisor view the record button, park button are not used, the mute button is used to control the supervisor speech to the agent.

The hang-up button controls only the supervisor’s participation in the call and does not control the agents call at all.

4.1.8.10.1.1 List of features available

- Permission to listen-in to calls is a per user function
- Supervisors can
  - mute and unmute speech to the agent (whisper)
  - see call history for the call they are listening in to
  - hang up call when listening in
  - add tags to the call, the same way as Agents can do
  - bring up the pop of CRM for the call
    - this includes all the other call data available in the preview

4.1.8.10.1.2 Additional notes

- When an agent transfers the call, the connection to the coach is detached
- In announced calls, the connection to the coach is detached
- The supervisor must select the call they would like to listen-in to, continuous listen-in is not supported.
- The calls a supervisor listened to are able to be found in Case Search in Enterprise Statistics.

4.1.8.10.1.3 Supported Supervisor devices

Supervisor can use any phone except for S4B when UCMA is used. SIP based solution with S4B is supported.
Supervisor can not listen in to call when Microsoft Teams is integrated using GRAPH API

4.1.8.10.1.4 Recording

Supervisor cannot start listen-in on calls that are being recorded in Trio.

If Quality Management Suite is used to record the agent's channel, the supervisor can start listen-in on those calls too.

4.1.8.10.1.5 Supervisor requirements

Supervisor must use Trio Agent Web in desktop mode to be able to use the listen in function

4.1.8.10.2 The Agent

Agent can be using different Trio clients and phonotypes; they are not limited to just be using Trio Agent Web but the notification for calls the supervisor listens in to is different for different clients.

4.1.8.10.2.1 Supported Agent devices

Agents can use any phone (Sip/PBX/Built-in/Mobile) except for S4B when UCMA is used. SIP based solution with S4B is supported.

4.1.8.10.2.2 Notifications to agent

Agents are notified differently when supervisor is listening in
Trio Agent Web has both a visual and sound based notification
Enghouse Trio Agent (Windows agent) has a sound based notification
Trio Phone agent has a sound based notification
Trio Mobile Agent has a sound based notification

4.1.8.11Built-in phone in Trio Agent Web

Enghouse Trio is a platform independent solution, it has been able to work with any phone as an agents answering device, but in more and more deployments, there is interest not to provide the agent with a real phone with a number and an active subscription. This way you can save costs.

Due to those reasons threre is a light weight softphone in Trio Agent Web, a phone that does not need a subscription, an account in the PBX regardless of if it is an on premises pbx or delivered from the cloud.

The built-in phone in Trio Agent Web does not require any other devices to handle calls giving the agent greater flexibility offering true free seating.

A built-in phone minimizes the cost for agents to receive calls, there will be no need for a mobile, a fixed or any PBX softphone. All that is needed is a standard headset and a web browser with connection to Enghouse Trio.

Using the built-in phone with a headset that supports WebHID also allows the agent to answer calls using the buttons on the headset. The headset must be connected to the computer through USB, either with a cable or via a dongle, and support the USB HID protocol.

A built-in phone will:

- make it easier for agent to service the CC with only access to the Enghouse Trio server
- minimize the cost for customers agents to answer calls
- make it easier for smaller partners to sell Trio solution in the cases they do not own the network.

Technical details:

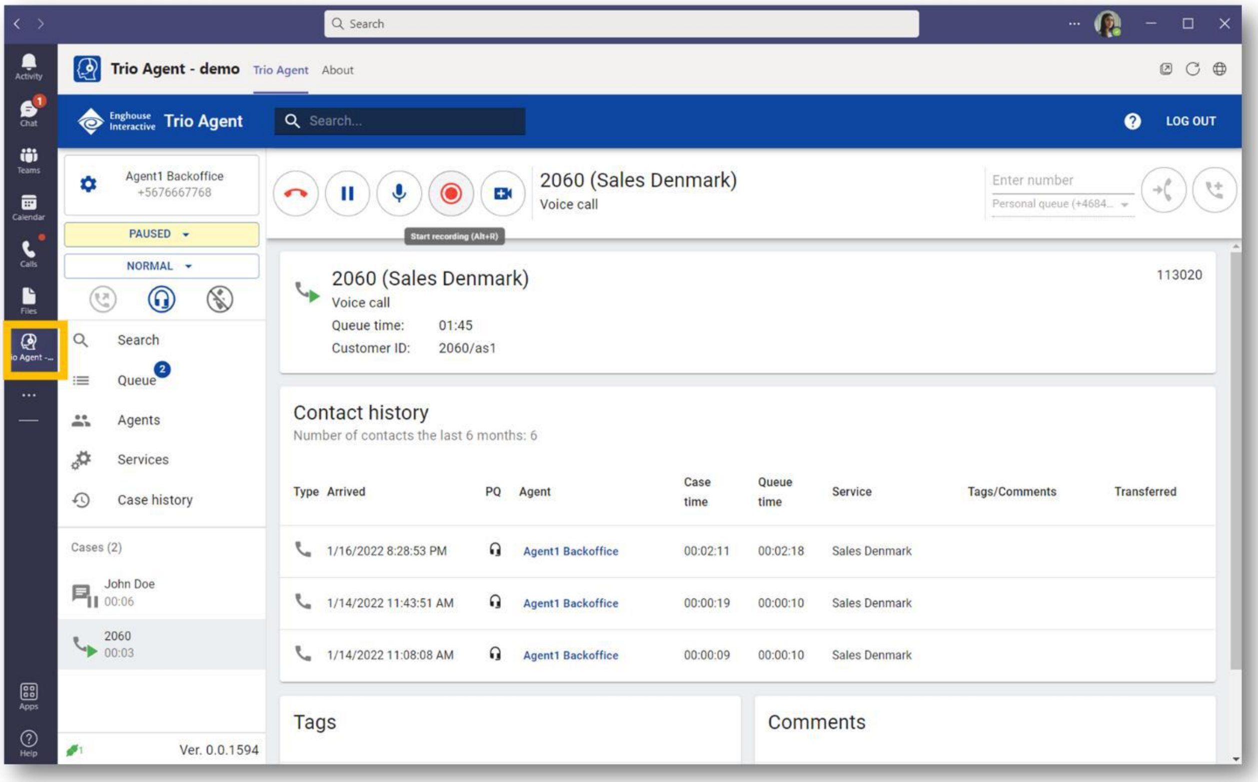
- Trio Server will act as gateway between the PBX, the Service provider such as Mobiltbedriftsnett/Tele2 Växel/Atea Mobil or similar.
- The function will require SIP connection to the PBX or SIP Trunk
- If Trio Agent Web is behind a NAT, the firewalls must support STUN technology on the server-side, and STUN or TURN technology on the client-side
- Agent will use a standard internet browser supporting WebRTC.
    - We recommend Google Chrome and a headset connected to their PC
- In most cases the Agent will have to accept the Trio Agent to use the headset, probably first time they select to use the built-in phone.
- DTMF from agent will be added as a feature since we no longer can reply on agents mobile or desk phone to send DTMF in call
- Agents will still be able to use any other phone as they do today, the built-in phone will just be an option.

- The function to hang up a call using headset may be disrupted by other phone applications such as Teams, and can therefore be disabled by the agent
- Built-in phone in a Skype for Business environment work only if the system has been deployed as a SIP/UCMA hybrid.
- In deployments with Microsft Teams the Trio Agent Web using the buit-in phone need to run the agent in the browser and not docked inside a Teams tab due to lack of Web RTC support in that configuration.
- When Trio is integrated with Microsoft Teams based on GRAPH API WebRTC built-in phone is not supported.

4.1.8.12Trio Agent Web as App for Teams

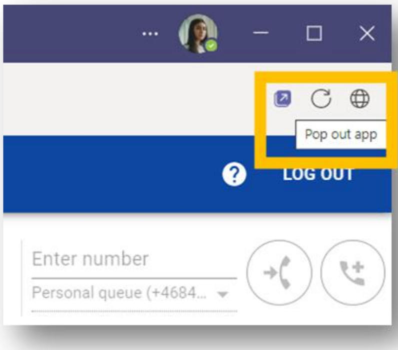
Teams app is important for both agents and users, it shall be easy to add and find when needed.

Trio Web Agent can be made available **as a Teams app** that is a more natural part of Teams user experience and will be practical for Agents that are not working with the CC all day long.



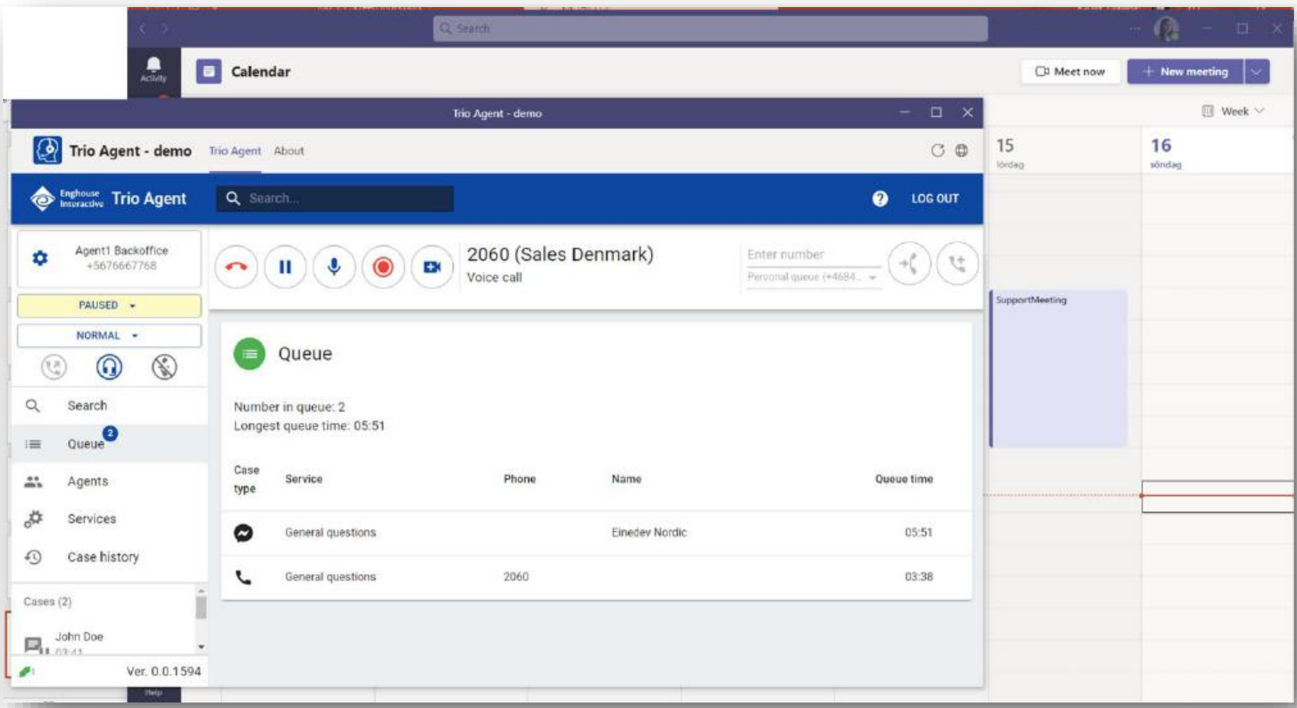
The agents can jump between other tabs in Teams and always come back to the application in a good state.

Status of chats and calls is loaded when users click on the application icon, this means that you can switch view without losing any cases.

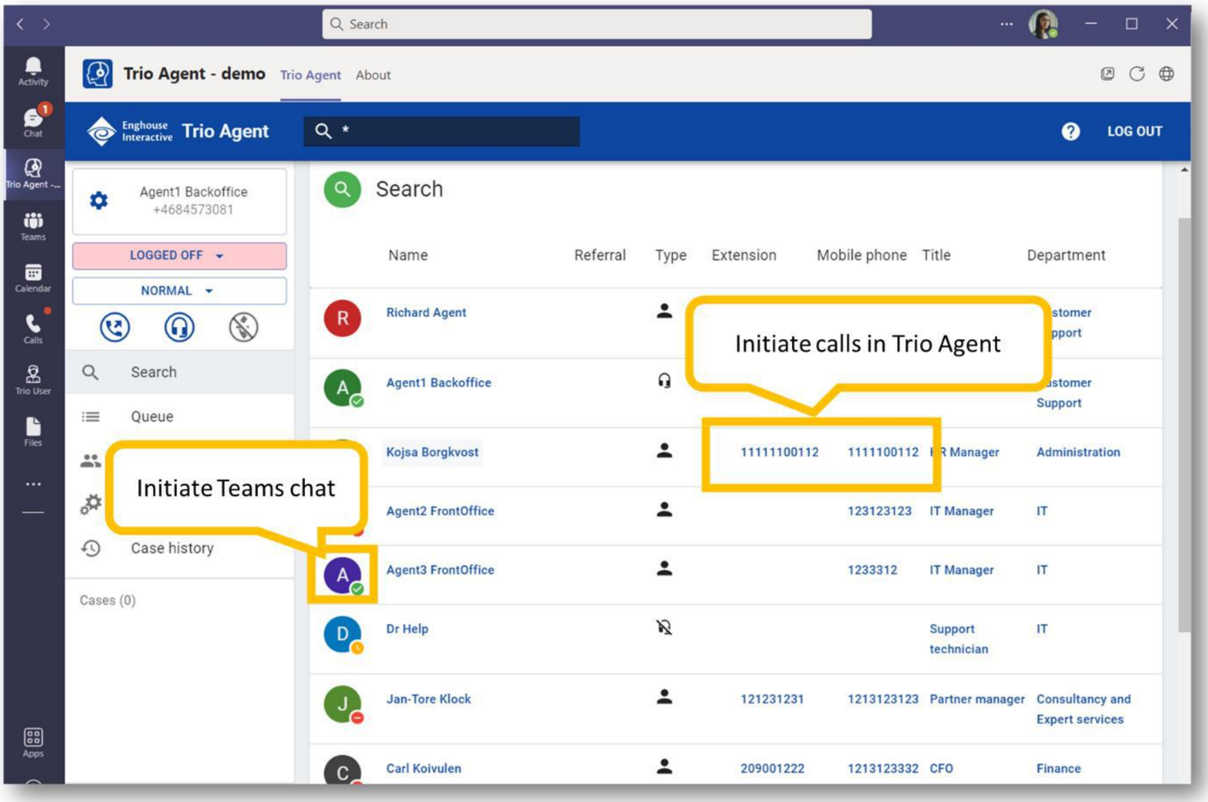


If suitable the Trio Agent App can be popped out for even easier access so the user can switch between apps.

This way new calls and chats will not interfere with the agent's application.



Agents can the same way as in Trio User initiate Teams chats based on presence, and make calls based on the information in the directory.



Adding the Trio Agent and Trio User apps to the Teams interface makes new user onboarding easier with a simple application rollout.

4.1.8.12.1 How does it work?

Teams can be regarded as a browser when Trio Agent is run as an app. Teams opens a web page in a tab, and the address to the web page is the external address to Trio Agent. This address is the only information that is shared with Teams. Trio Agent shares no information with Teams, and Teams shares no information with Trio Agent.

The zip file that is uploaded to Teams contains a manifest file where the important part is the address to Trio Agent. The zip file also contains some icons and the description of the app that is displayed in Teams, but not much more.

To handle the login procedure, Microsoft Teams JavaScript client SDK is used. But again, no information is shared since the login is done against the Trio system.

4.1.8.13 Miscellaneous

Enghouse Trio Agent Web support all the common Web Browsers such as Edge, Chrome and Safari. This means an agent can work from any PC and MAC and even a tablet.

The agent can use any answering device (if using Skype for Business the agent needs to answer in the Skype client) with any extension.

This first version of the Web Agent will have the core functionality that are available in the PC based Agent/Attendant client. The Trio Agent Web will continue to be developed and more functionality will be added continuously.

4.1.9 Enterprise Personal Greeting/(Personal Welcome Message), Available for all Enterprise Clients

Enterprise Personal Greeting gives the Attendant/Agent the option of recording a personal greeting phrase that will be played at the beginning of each call. It can be configured per attendant, per agent, per service and time of day.
Time can normally define morning, lunch and afternoon.
"Good morning and welcome to Trio, you are talking to Anna".
The greeting is played for both caller and attendant, when the attendant answers a call.
Administration of welcome messages:
Each attendant/agent records messages via a phone administration menu. (The administration number is specified in each installation.)

4.1.9.1 How does it work?

The greeting message is recorded via phone and is stored on the Enghouse Trio server. The administrator configures what service(s) should play the greeting message. The schedule of the service must be configured for the right message to be played, during the right periods of the day. The greeting message is played when the agent/attendant answers calls. The caller, as well as the agent/attendant, will hear the message.
Note that when using multiple Enghouse Trio Servers the recorded files must be copied to all servers. This could be done as part of the system implementation.

4.2 Enterprise Agent Client Options – (Requires Enterprise Agent Attendant Client)

4.2.1 Enterprise Agent Contact Center Art.No. P012210

4.2.1.1 Customer benefits

The Enterprise Agent Contact Center license expands the services, allowing customers to communicate in several different ways. These are:

- E-mail
    - See technical requirement for supported Mail servers.
- SMS - requires Enterprise Inbound SMS Server License (Art.No. TRIO-P002170 and Enterprise Mail Server License (Art.No. TRIO-P002110)
- Voice mail
- Advanced tasks/call back tasks (requires Outlook)
- Trio Web Chat (Requires Enterprise Trio Web Chat Server License (Art.No. TRIO-P002130)

4.2.1.2 How is it licensed?

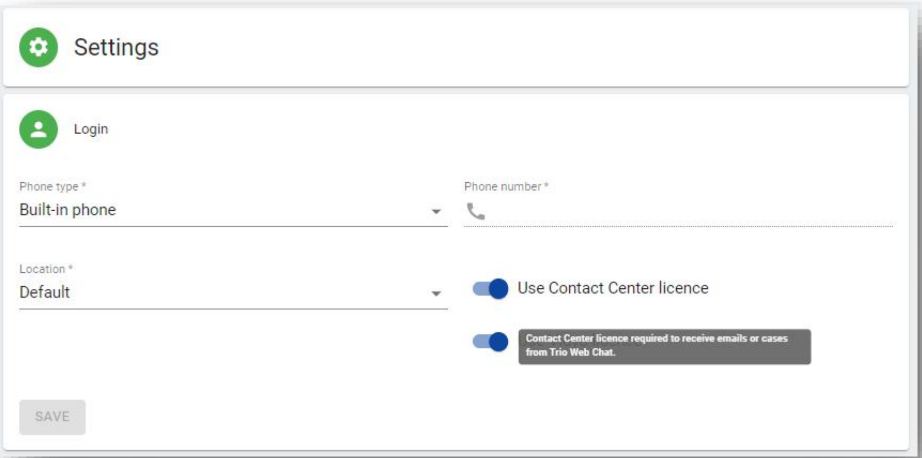
One license per simultaneously connected Agent that needs this function

Requirements

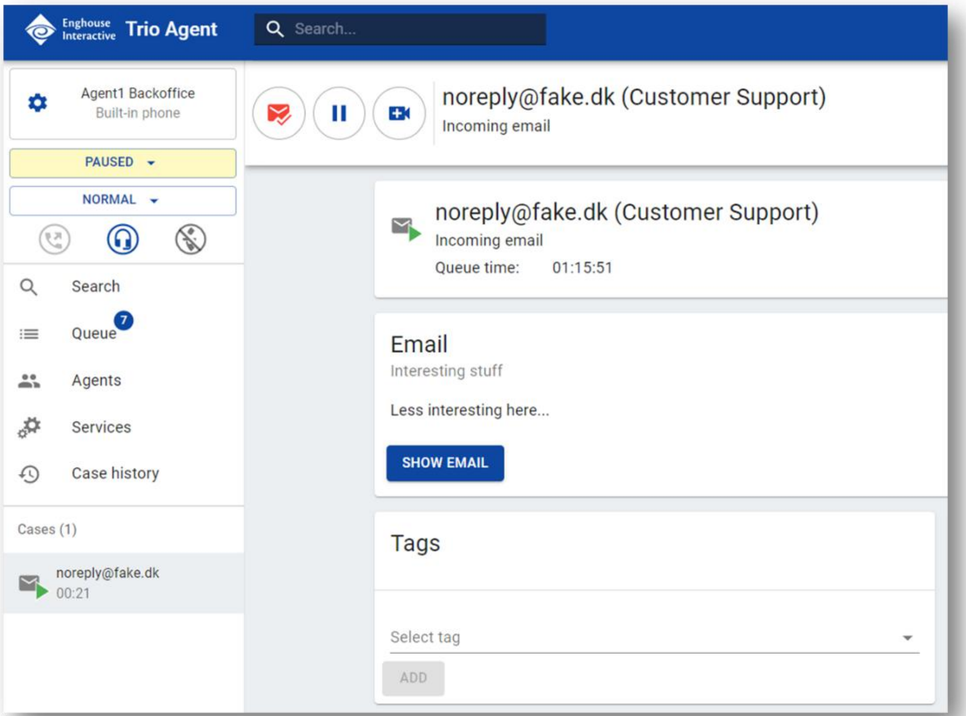
- The agents needs the Enterprise Agent/Attendant (Art.No. P012210). The Enghouse Trio Agent Web does not support contact Center cases.
- Server license: Contact Center (Art.No. P002110) and/or Trio Web chat (Art.No. TRIO-P002130)

4.2.1.3 How does it work?

A license is consumed if the agent logs in with the checkbox *Attach with Contact Center privileges* set or by selecting the Contact Center license in the settings of Trio Agent Web



When an agent is selected for a message case and the agent accepts, it is opened directly in the message system client (Outlook or Outlook Web Access)
Agent can preview case in Trio Agent web but uses the Outlook or Outlook Web access to handle the e-mail.



- SMS and E-mails are handled the same way as plain e-mails.
- A voice mail message comes as an MP3 attachment.

4.2.2 Enterprise Agent Video addon Art.No. TRIO-P012220

The Enterprise Agent Video add-on enables agents to be able to answer video cases queued by the Enghouse Trio Server.

4.2.2.1 Customer benefits

Agents that choose to use this function do it by selecting to consume one Video license. Since the feature is licensed per concurrent Agent and is separate from standard Agent functionality the customer may easily decide what agents shall handle Video without enabling it for the whole workforce.

Agents can benefit from getting visual view of the visitor or the visitors issue that will lower the risk of misunderstandings.

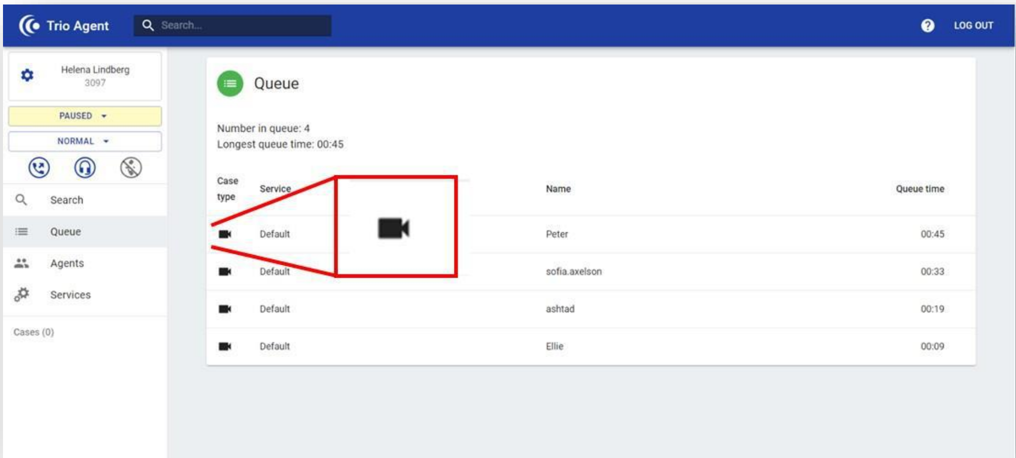
4.2.2.2 How does it work?

First of all the Enghouse Trio Server must be configured and Enterprise Agent Video license should have been added to the system

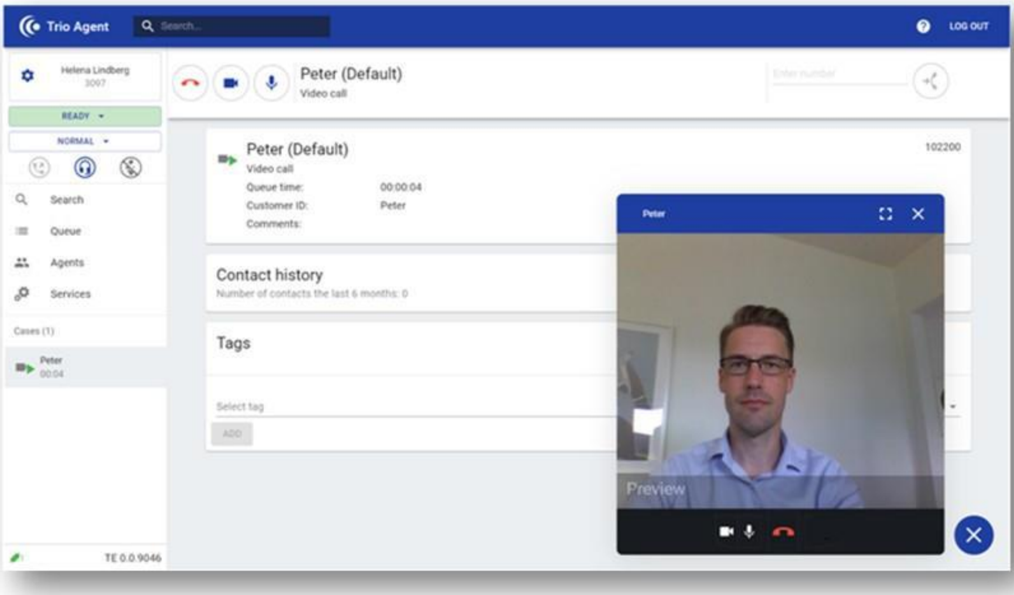
Agent will be able to select to consume a video license in their client

After that Agent will be assigned when being ready or can pull Video cases from the queue in pause.

Video cases are clearly visible with a separate icon.



In queue preview the agent will get any information that can be associated with the call, in most cases the information the visitor has specified in the video banner that is used to be placed in queue.



The agent can do the following with a video case:

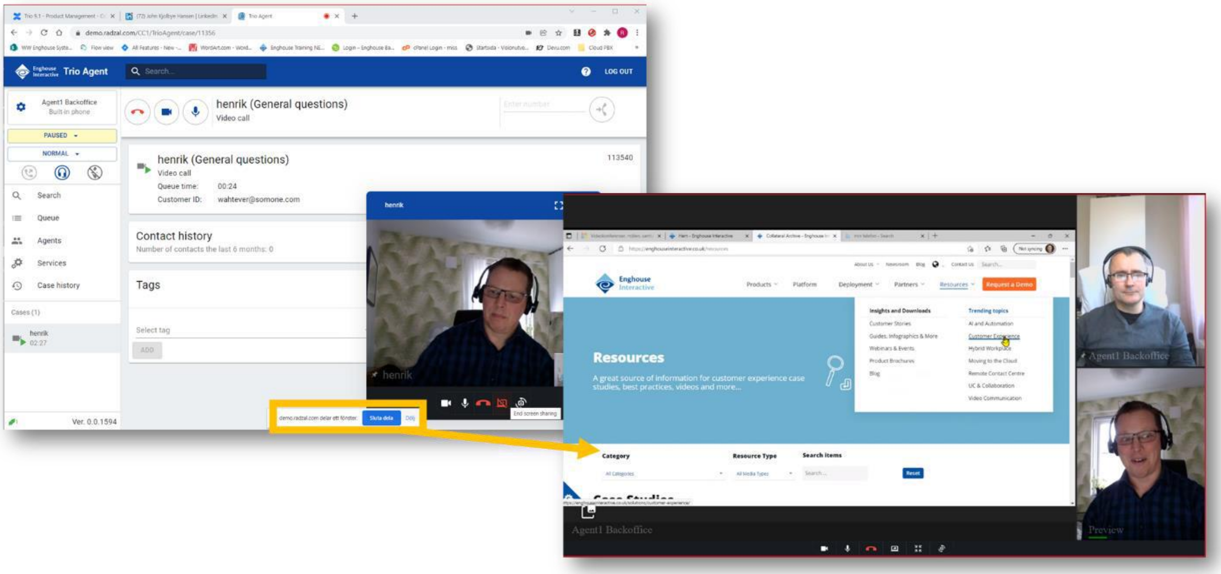
- Answer manually in paus mode
- Be assigned a video case automatically in ready mode
- Mute and unmute the microphone
- Turn off and on camera
- Maximize or minimize the video screen
- End case
- Add tags

Actions not available in Enghouse Trio 9.0

- Parking of a video case
- Transfer the case

4.2.2.2.1 Screen and application sharing

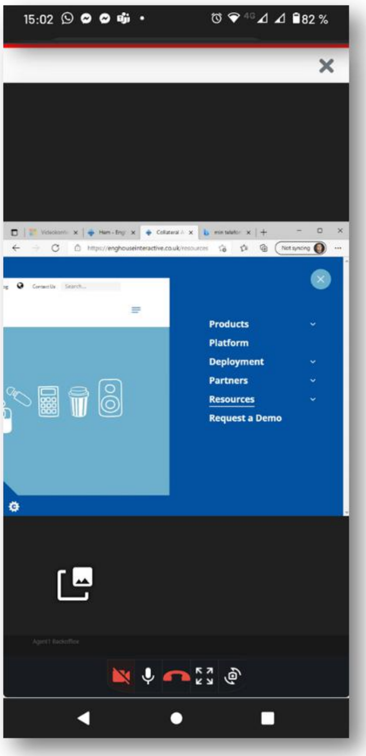
Live collaboration and guidance are important for customers seeking assistance from an agent, the common way is to switch from chat to voice. But that does not always solve the communication problems. With video there is an option to add screen sharing option to any medias, you can escalate a call or chat to video with voice.



Screen and applications can be shared from agent to customer and the other way around, now agent can clearly explain and show documents, videos etc.

This way you will greatly enhance collaboration possibilities for customers and agents using the Vidyo module.

Neither the visitor or agent are limited to special websites or applications meaning that live guidance is available for anything that can be shared from the desktop.



Mobile visitors can not share their smartphone screen, however they can view material that the agents shares with them.

If needed the visitor on mobile will be able to zoom when default view is too small.

4.2.2.2.2 The Video case flow

There are two ways to use Video in the contact center, initiated by the visitor or by the agent.

We assume that a banner that initiates a video case in Trio has been deployed on customer website.

4.2.2.2.2.1 Initiated by the visitor

The case flow starts with a visitor that is browsing the company's webpage

On the webpage the visitor chooses to initiate a video call to the contact center

A video case is created in Trio and the visitor will get updated information about their place in queue.

A agent that is able to handle video cases is assigned or picks up the case

A conference in the vidyoplatform is created and agent is added to this conference followed by the visitor.

Both parties can mute, enable sidable camera and end the call.

4.2.2.2.2.2 Initiated upon request from agent

The caseflow starts with a visitor that is chatting or talking to the agent and agent

The agent sends a unique URL to the vistor over chat

The vistor uses the URL to initiate a video call to the contact center

A video case is created in Trio and the visitor will get updated information about their place in queue.

A agent that is able to handle video cases is assigned or picks up the case

A conference in the vidyoplatform is created and agent is added to this conference followed by the visitor.

Both parties can mute, enable sidable camera and end the call.

4.2.2.3 How is it licensed?

- One Enghouse Trio Agent
- One Vidyo subscription license per concurrent Enterprise Agent Video addon
- One Enterprise Video Server (Art.No. TRIO-P002230) required

4.2.2.4 Technical requirements

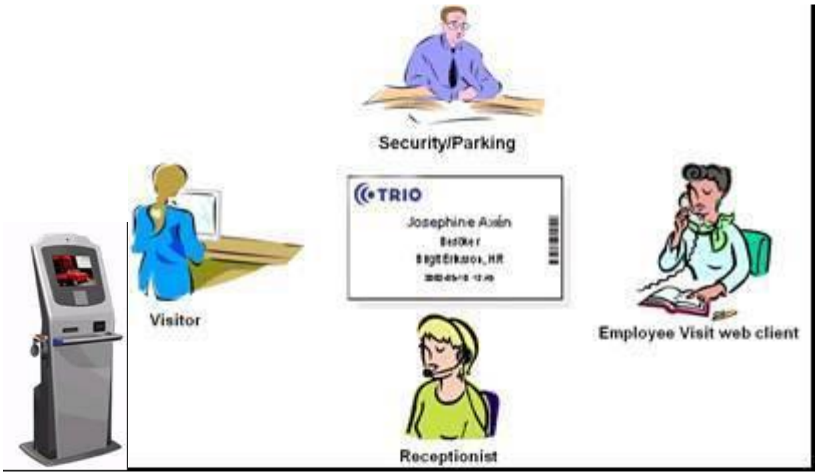
- Trio Agents msy be able to contact the cloudbased Vidyo service
- Agents shall use recommended browsers supporting WebRTC, for example Google Chrome or Microsft Egde. Check the technical requirements for Enghouse Trio to get the most updated list.

4.3 Enterprise Visit Clients

Note: From Trio 9.3, Visitlog is recommended as a replacement for Trio Visit. See 15.3, Visitlog (Art.No. TPR1002) for details.

4.3.1 About Enterprise Visit

Trio Visit is a complete visitor management system. Integrated with the Enghouse Trio server and Enterprise Directory, searching for hosts and sending messages is easy. Trio Visit can also be used together with Agents working in a contact center, where you use the Visit system for registering visitors / clients that should be serviced by the contact center / service center. Using this system, you can benefit from the CRM integrations and the statistical reporting tools, to manage all your customer contact.



Trio Visit handles visitors through a registration system that registers when visitors go in and out from a company’s front desk. Using a self-registration client in the reception, the visitor can register his/hers name, phone number and car, as well as search for the person to visit. The receptionist can activate and register exit of the visit, by simply scanning the visitor badge bar code. Employees can pre-register visitors through the

system's web client, when expecting a group of visitors. The visitors' badges can be printed in advance, to be ready in the reception area when the visitors arrive.
From the Reception client, you can activate a visitors' search in the visitor database, print parking lists and evacuation lists. Trio Visit contains a database, containing all employees. This is used when visitor selects the person he/she is visiting. The database also contains information about visitors, so when he/she is revisiting, the system can suggest information and the visitor saves time registering. Using the Reception filter, the system can handle a network of several receptions or exit areas, so that a person can be registered at one reception and exit at another.
No hardware is included.

4.3.1.1 How the agent handels visits

This function gives the possibility to receive personal visits in the same queue as phone calls,mails, chats etc.

4.3.1.2 Customer benefits

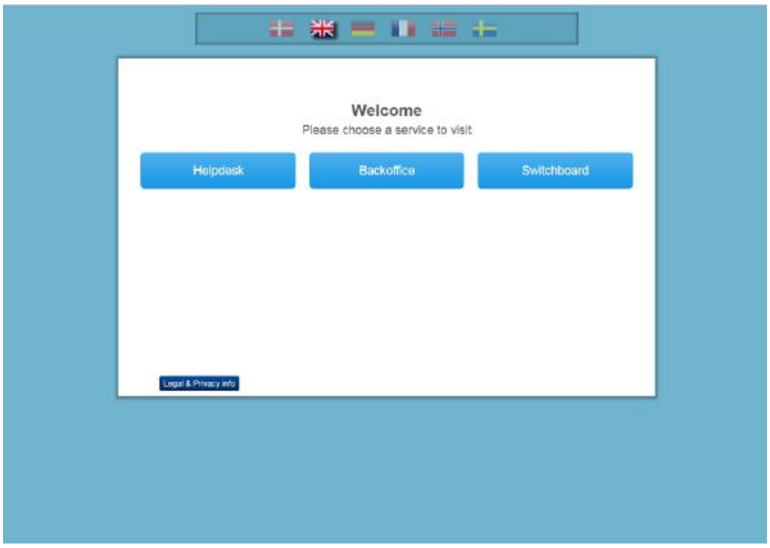
For organisations like municipalities or travelling agencies, visitors might often require assistance from the same customer service agents that usually handle phone calls. With the visitor function, agents no longer need to log out from the phone services to handle visitors, something that simplifies their work.
Handling the visitors within the Enghouse Trio system also gives a more complete picture of the cases handled by all agents, and this can be viewed using the statistics modules.
Let us say that a customer has visited a travelling agency, and discussed his travelling plans with an agent. If the same customer calls within a couple of days, the system can automatically try to connect the caller to the same agent he/she talked to during the visit.

4.3.1.3 Requirements

- Enterprise Agent/Attendant (Art.No. P001210)

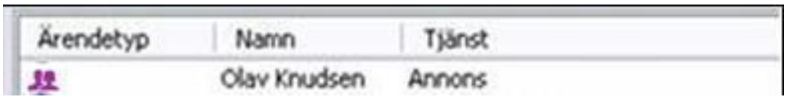
4.3.1.4 How does it work?

The visitor registers his/her visit in a Visit Registration client (Visit Registration Art.No. P013120) and selects the service he/she needs.



When the visitor is registered, there is a possibility to get a queue ticket printed (printer is not included, consult Trio Technical Requirements to find out what kind of printers are supported).

The visitor's case is inserted into the selected service. The visitor then must wait for his/her turn.



A waiting visitor is shown

When an agent is assigned and has accepted the visitor a window is displayed, with the visitor's name and queue ticket number.

The agent handles the visitor and clicks the *finished* button and is then ready for the next case.

4.3.2 Enterprise Visit Security Client Art.No. P013110

From this client, the following tasks can be performed:

- View current and previous visits
- View visitor statistics
- Handle emergency situation
- Have a live view of the latest activities taking place in Trio Visit

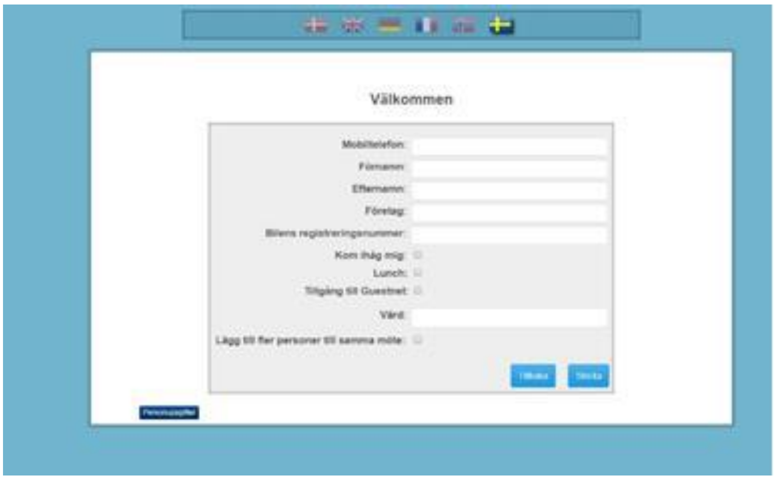
The security manager can search for personal data and delete it in beforehand if the person owning the personal data so requests.

4.3.2.1 How is it licensed?

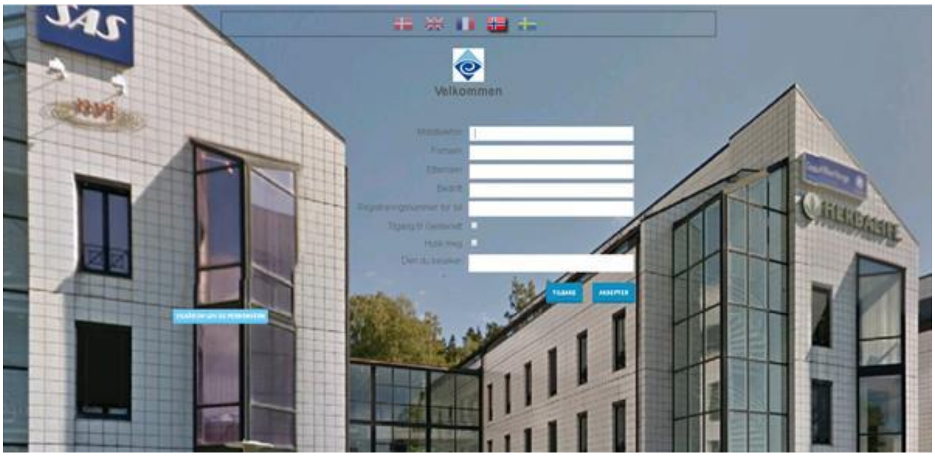
One license for each concurrently logged in Visit Security client.

4.3.3 Enterprise Visit Registration Client Art.No. P013120

The Visit Registration client is located at the reception area, for visitors using self-registration. It is possible to enter personal information, and to search the corporate database for the person you wish to visit. The system will automatically send a message to the recipient/host, indicating that the visitor has arrived. This is done via SMS or e-Mail.
When sending messages to the recipient, it must be taken into consideration whether there are several visitors from the same company arriving at the same time. When visitors from the same company register at the same time, using the ”next visitor from the same company” button, these visitors will be bundled into the same message to the recipient.
The visitor will recieve a badge that will state the name of the visitor and who to visit at the company. The badge can be used to logout when leaving the building.
The registration client has a new interface from Enghouse Trio 7.1. each customer can design the look of the client as they prefer. “Easier” configuration are made from a configuration client but it is possible to change the complete look and feel of the registration client by entering code in a css-file.
Default configuration:



Example of CSS-file changes:



The registration client can have different companies using the same client. The Companies are divided in extrafields in Enghouse Trio Company Directory database and the visitor can pick which company to visit. Every company can then have their own design in the registration client.
We recommend that the technician who configures the website works with the Visit configuration program in Chrome.

4.3.3.1 How is it licensed?

Visit Registration is licensed for each installed client.
No hardware is included.

4.3.4 Enterprise Visit Reception Client Art.No. P013130

The Visit Reception client is used by the receptionist. The receptionist can register the visitor manually, or simply choose to activate/deactivate the visit, from what has been noted in the registration client. The receptionist can see all the pre registered visits .He or she can also print a parking list or an evacuation list, or search in the list of active visitors. It is possible for the receptionist to pre print or re print badges. The receptionist can choose if a message to the host will be sent or not.

4.3.4.1 How is it licensed?

Visitor Reception Client is licensed for each installed client.
No hardware is included.

4.3.5 Enterprise Visit Web

From this web interface, employees can register visitors in advance. This is used for handling large numbers of visitors, for conferences, training or meetings. Badges can be pre-printed and the registration process can be organised smoothly and efficiently.

4.3.5.1 How is it licensed?

The Visit Web licenses is included in the above articles.

5 Trio User Features

Enterprise User Features can be purchased in a bundle or individually when so suitable.

The User features are divided into:

	Trio Core Server	Enterprise User Art.No. P021210	Trio User (Trio User Webclient) Art.No. P020210	Presence Connection Art.No. P020211	Calendar Connection Art.No. P020212	Voice (voicemail) Art.No. P020213
Records in database	X					
Import/Export	X					
LDAP/AD Sync	X					
Refferal(Nordic Presence)	X					
Mobile Line State	X					
Presence		X		X		
Calendar integration		X			X	
Voicemail		X				X
Trio user web client		X	X			
Mobile Trio web user		X	X			
Line State	X					
Spoken Presence	X					
Directory API	X					

5.1 Separated Trio Use Features

5.1.1 Trio User (Trio User Web client) Art.No. P020210

See: Trio User

5.1.2 Presence Connection Art.No. P020211

See: Enterprise Presence Connection

5.1.3 Calendar Connection License Art.No. P020212

See: Enterprise Calendar Connection License

5.1.4 Voice License (voicemail) Art.No. -P020213

See: Trio Voice

5.2 Enterprise User License Art.No. P021210

Enterprise User Licens is the user license for the Enghouse Trio system. The following articles are included in the User License:

- Enterprise Directory Licenses
- Import/Export
- LDAP
- Calendar Connections
- Trio User
- Trio Guest
- Presence Support (Teams /Skype)
- Mobil Line Status
- Voice Guide
- Voice Mail
- Flex Connection

Enterprise User Licens makes it possible for the user to forward the extension (referral) using one of the many options offered by Enghouse Trio. The license also makes the user searchable for attendants and collegues in the company database. An Enterprise Directory License (see below) converts to an Enterprise User license if the record in the database has a login name and a password or a calendar connection configuration. This is the case even if the record does not have an extension or mobile number configured.

5.2.1 Enterprise Directory License (Record in database)

5.2.1.1 Customer benefits

Enterprise Directory License is the license for the Enghouse Trio Directory database. This license is one of the fundamentals in Enghouse Trio.

To make administration smoother and automated the Enterprise Sync Module can be used.
The Enterprise Sync module automatically updates the Enghouse Trio Directory from a centralised database in the network. This can be any database using import-export functionality based on separated files or an LDAP server. This minimizes the work required to maintain the directory, and reduces the risk of spelling errors or duplicated users. Information handling between different departments in a company is often an issue. With Enterprise Sync, when a person gets a new e-mail address, it automatically updates the person’s record in the Enghouse Trio Directory Database.
Enterprise Sync also includes an import and export function, so that Enghouse Trio can import and export comma-separated text files.
Enterprise Sync integrated with the customer Active Directory is a great tool for more efficient administration of Microsoft SFB Connections or Calendar Connections towards Outlook The Enterprise Sync will avoid manual administration and mistakes that can easily be made that way.
It is possible to

- Import parts of values from an LDAP directoiry using regular expressions.

- also it is possible only to update matched entries and not create new ones in Trio based on the LDAP directory. This way it is easier to control licensing and what is created in Trio by only updatering data from LDAP.

5.2.1.2 Special Considerations regarding Enterprise Sync

Database fields must be mapped correctly and a unique key field must be selected.
The LDAP connection will create the organization chart in the Trio Company Directory database.

The Enterprise Directory can be connected to several LDAP sources (max 20). The LDAP server must support LDAP version 3. To synchronize with the LDAP source one needs to determine the LDAP Base Context from which searches for LDAP directory entries to be synchronized should be performed.

Examples:

- Windows:
  cn=users,dc=trio,dc=com or
  ou=organization unit,dc=trio,dc=com
- Novell eDirectory:
  OU=<organization unit>,O=<organization>

If several LDAP sources are to be synchronized from they can be from different LDAP sources or from the same source but from different LDAP directory entries.

The LDAP source can be either a local Windows Active Directory or Microsoft Azure AD.

5.2.1.3 How is it licensed?

The license level is based on the amount of records in the database, with a name and number. By number we refer to a record containing an extension with priority one, or a mobile number.
Examples:

- An extension with priority two will also require one license, if that extension does not have a priority one subscriber registered.
- If a subscriber has an extension with priority two and a mobile number, then the user is counted as one license.
- If a number is used several times it is counted as one license, even if the number is not registered with priority one in any of the records where it is used.

<table>
<tr><th>First name</th><th>Last name</th><th>Internal nr 1</th><th>Prio</th><th>Internal nr 2</th><th>Prio</th><th>Mobile nr</th><th>License</th></tr>
<tr><td>Jon</td><td>Brown</td><td>123</td><td>1</td><td></td><td></td><td></td><td>1</td></tr>
<tr><td>Fred</td><td>Wince</td><td>123</td><td>2</td><td></td><td></td><td></td><td>0</td></tr>
<tr><td>Jan</td><td>Ford</td><td>123</td><td>2</td><td></td><td></td><td>070700998</td><td>1</td></tr>
<tr><td>Jonny</td><td>O’Raily</td><td>200 (PN)</td><td>2</td><td></td><td></td><td></td><td>1 (PN)</td></tr>
<tr><td>Steve</td><td>Sawkins</td><td>300</td><td>2</td><td>350</td><td>1</td><td></td><td>1</td></tr>
<tr><td>Jane</td><td>Smith</td><td>301</td><td>2</td><td>360</td><td>2</td><td></td><td>1</td></tr>
<tr><td>Frank</td><td>Henry</td><td>321</td><td>2</td><td></td><td></td><td></td><td rowspan="4">1</td></tr>
<tr><td>Clive</td><td>Cussler</td><td>321</td><td>2</td><td></td><td></td><td></td></tr>
<tr><td>Bryan</td><td>Brown</td><td>321</td><td>2</td><td></td><td></td><td></td></tr>
<tr><td>Terry</td><td>Sinatra</td><td>321</td><td>2</td><td></td><td></td><td></td></tr>
<tr><td>Fredrik</td><td>Man</td><td>678</td><td>1</td><td></td><td></td><td></td><td rowspan="3">1</td></tr>
<tr><td>Jonny</td><td>Walker</td><td>678</td><td>2</td><td></td><td></td><td></td></tr>
<tr><td>Harry</td><td>Potter</td><td>678</td><td>2</td><td></td><td></td><td></td></tr>
</table>

5.2.1.4 How does the automatic update with Enterprise Sync work?

Fields from the organisational directory will be “mapped” with fields from the Trio Company Directory database, for example the field “Extension” in the Company Directory database is “mapped” to “telephone number” as the LDAP-Attribute. A key field is chosen to make the user unique.
Enghouse Trio Sync is used to import users, either as a single or as a scheduled event. Enterprise Sync supports LDAP import and flat file import/export.
The module can also be used to import or to export data. It works using standards like [,] or [;] separated text files. Set up the schedule per hour, day, week, or month. Specify one or two fields as key fields when synchronising databases. This function is used for example when information from a personnel system is transferred to the Trio System. An example of a text file:
1, Karlsson, Per, 1234, Sales
2, Ahl, Petter, 2345, Support
3, Ohlsson, Pia, 3421, Sales

The LDAP Client allows organisations to manage parts of the Enterprise Directory user information with the same tools they use to manage the users in their networks. This reduces the need for administrators to enter the same user information in several places. It is only necessary to enter the common information once, in their organisational directory (for example, Windows Active Directory or Lotus Notes Domino server). This reduces the risk of the same or incorrect information being added e.g. by administrators in different departments. With Enterprise Sync, when a person is given a new e-mail address it automatically updates the person’s record in the Trio Directory.
The LDAP client in the Enterprise Sync license follows the LDAP 3 standard. Trio can read information from the organisational directory and create, update or delete users in Enterprise Directory as they are created, changed or deleted in the organisational directory. The directory synchronisation process uses the LDAP standard protocol to communicate with the organisational directory.
It is possible to use LDAP to import up to 9 extensions to each user in the database.

5.2.2 Enterprise Calendar Connection License

5.2.2.1 Customer benefits

Trio Calendar Connection is a server to server-based installation, which means there is no installation necessary on the client site. The calendar process synchronises calendar events between the Mail server, and the Enterprise server automatically synchronises presence event information. If you add, delete or change a presence event in Trio, these changes will be reflected in the calendar (if you have a two way calendar integration). This is also true for changes in the Calendar being replicated to Enghouse Trio Directory. Recurring appointments will work, as well as meeting invitations (see charts below for details). The presence events/appointments are visible for other Enghouse Trio Directory users, as well as for the attendant.
Appointments made from your handheld computer (Palm, Smartphone etc.), or from your mobile phone, will automatically sync over to the Trio System, and close your phone automatically (activate Do Not Disturb) when you sync your mobile phone or handheld computer with your PC.
When users accept meeting invitations from other users, their phones are managed according to the presence event and are closed when the meeting starts, and reopened when the meeting ends (see charts below for details). See the Precense Connection to a PBX module for more information on presence events.

5.2.2.2 Considerations

Today Enghouse Trio supports the following calendar systems:

- Exchange / Outlook
- Google mail
- Exchange Online, Office 365
    - Exchange Online is accessed using the Microsoft GRAPH API

In most cases one Enghouse Trio system can connect to multiple Calendar Systems

The table will show whether the different calendar connections can coexist on the same Enghouse Trio Server or not. For further information, see the Solution Design Guide.

	Exchange 2016(2019	Exchange Online Office 365	Google Mail
Exchange 2016/2019	Same server if network allows it.	Same server if network allows it.	Same server if network allows it.
Exchange Online	Same server if network allows it.	Same server if network allows it.	Same server if network allows it.
Google Mail	Same server if network allows it.	Same server if network allows it.	Satellite server is needed

Supported System sizes:

	Exchange 2016/2019	Google Mail	Exchange Online Office 365
Maximum Size	4000 per Trio server, satellites are needed for load balancing larger systems	1000 users	4000 users

The amount of users for Google are set due to the delay between the users since the calendar connections are using “polling”). I.e 1 seconds delay between users will be a maximum of 15 minutes delay from setting a booking until it will be set in Enghouse Trio.

5.2.2.3 How is it licensed?

One licenses for every user of the Calendar Connection

5.2.2.4 Exchange – Two-ways

From the calendar
Server appointments are synchronised to the Enghouse Trio server and entered as presence events. These will control the user’s phone in the same way as a presence event entered by one of Enghouse Trio clients. The following information is synchronised:

- From time – date
- To time – date

- Subject field (in the Enghouse Trio directory, this is the presence event information field). Please see special section for Exchange Lite.

- Private
  - The subject fields in the calendar appointment is not synchronised, only the presence event code.

There are two main ways of configuring the calendar connection that are two ways.

1. “Synchronise all” – this command will synchronise all calendar appointments and enter them into the Enghouse Trio directory. If there is no presence event code entered in the beginning of the system, it will use the configured default presence event code. If the user has entered a presence event code in the subject field, this will be entered as the presence event reason. Presence events entered using Enghouse Trio clients will be synchronised with the calendar, with the correct presence event codes. When synchronising from Enghouse Trio to the calendar, the filtering of which code should be entered into the calendar or not, will work as configured in the system.
   When using “synchronise all” it is common to configure the system to leave the phone open, but enter the presence event information in the database. That way the call is transferred to the phone, but when the phone is redirected to the attendant or when the attendant searches the database, it will show the presence event information from the calendar.

2. Synchronise calendar appointments using presence event codes.

A presence event code must be the first 4 characters in the subject field, consisting of three letters and an indication (a colon or a semicolon) of how the user’s phone/extension should be managed for the duration of the presence event.

Colon (:) Extension closed/Activate Do Not Disturb (forwarded to Enterprise Voice or attendant)
Semicolon (;) Extension will be open/Do not activate Do Not Disturb. It will only supply information for your colleagues and operators at the company. All other appointments will not be synchronised.

Example of presence event codes

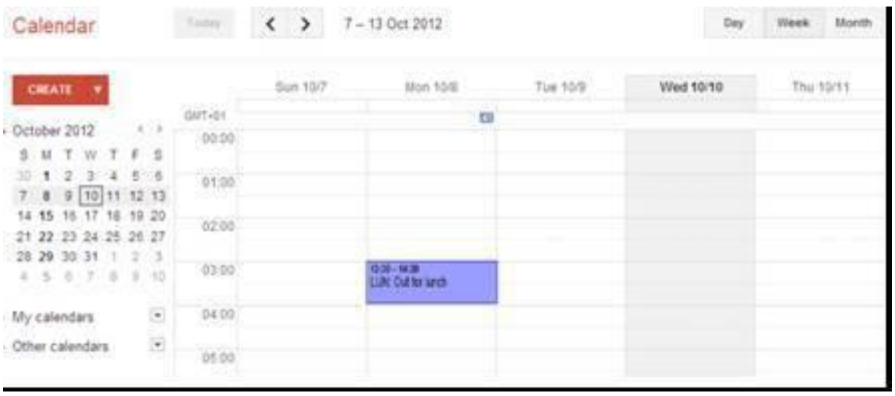
Code	Description
MEE	Meeting
LUN	Lunch
SIC	Sick
TRA	Travel
….	…

All presence events that are synchronised from the calendar system will be marked with the signature <CAL>, to indicate that they have been synchronised from the calendar. Every customer has to decide which codes are to be synchronized.

From Enghouse Trio clients
Presence Events created or changed in one of the Enghouse Trio clients will be synchronised to the Calendar. This does not apply to the Google Calendar and Exchange Lite connections since they are only one-way, from the Calendar to the Trio system. A filter can be configured for the system (system configuration only), deciding which presence events should be sent to the calendar, and which should not.
Presence events from the clients to the calendar will always be displayed with a presence event code in the subject field.
It you remove a presence event from Enghouse Trio Client; it will remain in the calendar. However, the presence event code will be removed if the system is set up with presence event codes only. If the system is set up with “synchronise all” the appointment will be marked with a semicolon (;)
It is important to understand the difference between one-way and two-way connection. If the calendar connection is configured for one-way it is NOT possible for the agent/attendant to change a booking/referral that has been set from the calendar. If the Agent/attendant is to remove the referral from Enterprise Attendant it will NOT be removed from the calendar.

5.2.2.5 Google Mail

The Google Mail connection will use the same behavior as Exchange. The user will write a code followed by a : or ; i.e MEE:. Users have to share their calendars with the account used for the calendar synchronization. The connection is one-way.



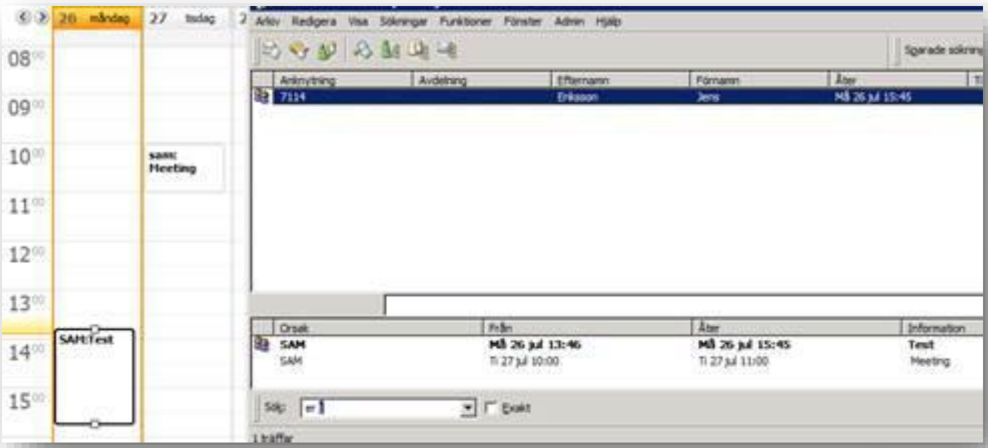
5.2.2.6 Exchange Online, Office 365

Exchange Online is the cloud based calendar from Microsoft. The connection is one-way. The Triosystem can be configured to synchronize bookings from the calendar by availability status or by three letter codes in the subject field. See below , Enterprise Exchange Lite connection License for how the two different configurations work.

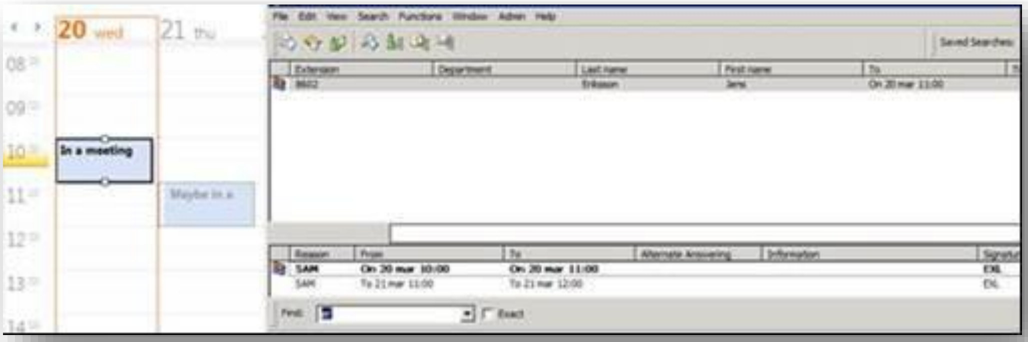
5.2.2.7 Enterprise Exchange Lite Connection License

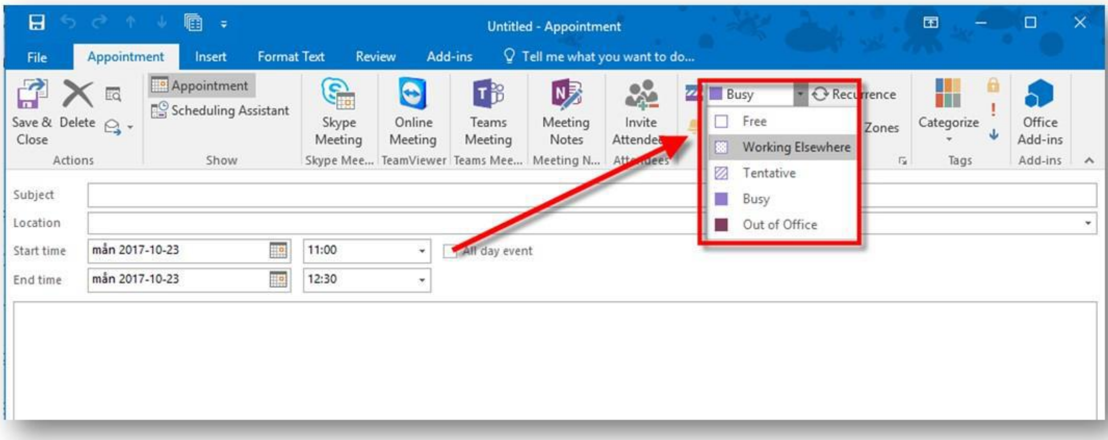
Exchange Lite is a “lighter” version of the regular Exchange connection. It is called Lite for two reasons. The first reason is for security, the Trio account that monitors the mailboxes does not need to have such extensive rights as in the regular Exchange connection. The second reason is for simplicity. The Exchange Lite connection will set a referral by the use of free/busy information of the booking. The system can configure the 5 different states, free, busy, tentative, working elsewhere and out of office to close or not close the users extension.
Exchange Lite can also work with codes. The connection is one-way.
Private bookings can also be synchronized if so desired but without subject becoming visible in Enghouse Trio.

1. In the example below the calendar integration is set to “Subject Parsing” mode (code).



2. If the calendar integration is running in “Availability mode” it will look like below. The first booking has Availability set to “Busy” and the second one is set to “Tentative”. Depending on how the system is set up, the availability codes can give different results in the bookings. Note that the bookings’ subject field will be hidden in this mode.





5.2.2.8 Functions table

	Exchange 2016/2019 (two-ways)	Exchange2016/2019 (Lite)	Exchange Online	Google Mail
Uses code i.e MEE:	Y	Y(Code)	Y(Code)	Y
Uses Busy, tentative (availability)	N	Y(Avail.)	Y(Busy)	N
”Soft bookings” can be made	Y	Y	Y	Y
Two ways	Y	N	N	N
One Way	Y	Y	Y	Y
Subject will be shown	Y	Y (Code) N/A (Avail.)	Y (Code) N/A (Avail.)	Y
Option to hide subject	Y	N/A	N/A	N
Booking invites will work	Y	Y	Y	Y
Tentative booking invites will not close phone	Y*	Y	Y	Y
Supports Syncronize all	Y	N	N	N
Private bookings	Y Will hide Subject	Y Will hide Subject	Y Will hide Subject	N

1) Exchange Lite works on booking codes OR availability, optionally.

5.2.3 Enterprise Presence Connection

5.2.3.1 Customer benefits

The Presence connection in Enghouse Trio gives the customer the possibility to review the current presence status of the employees in the Enterprise Attendant application.
The Enterprise Attendant can:

- Subscribe to, and display presence status available in an integrated presence source.

It is possible to integrate with the following presence sources;

  - Microsoft Skype for Business
  - Microsoft Teams
  - Cisco Unified Communications IM/Presence (Jabber)

This way the attendant can see the presence status of the users, to make a decision of which person is the best receiver of a call, to ensure that the call gets treated appropriately.
The following presence icons are used:

Available

Not at the PC

Not connected

Busy

The following precense icons are used in Trio Agent Web:

Available

Not at the PC

Not connected

Busy

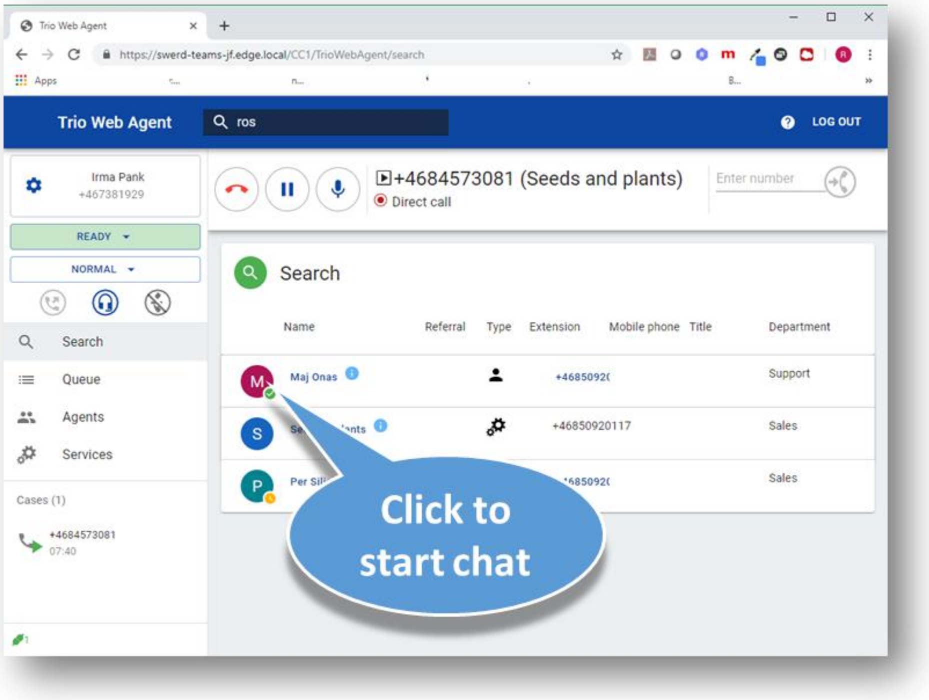
Do not disturb

Except of presence, the following information is shown in Enghouse Trio Attendant (Not shown in Trio Agent Web):

- Microsoft Skype for Business
  - Personal Note
  - Location

The integration with Microsoft Skype for Business or Microsoft Teams gives the attendant the possibility to initiate a chat session with a user in case of an urgent call instead of having to call the person.

The same possibility is available in the Trio Agent Web



5.2.4 Enterprise Mobile Line Status

5.2.4.1 Customer benefits

The Enterprise Mobile Line Status gives the customer the possibility to review the current mobile line status of the employees in the Attendant application. The Attendant is able to view the current mobile phone status that shows if the phone is busy, shut off or is available for new calls.
This way the attendant is able to determine which user is most suitable to receive the call.
The following icons are used to present mobile line status in the Enterprise Agent Attendant Client:

 The mobile phone is available.

 Mobile phone is busy

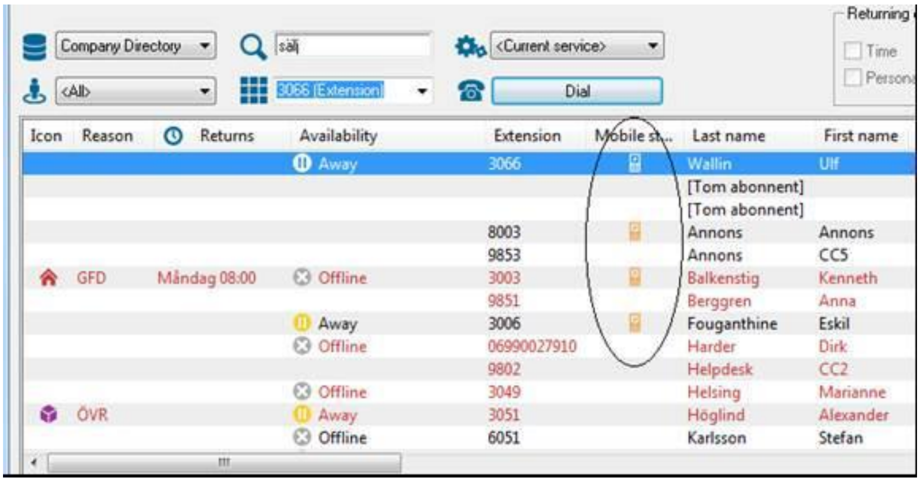
 Mobile phone is switched off or no service.

The following icons are used to present mobile line status in the Trio Agent Web:

 The mobile phone is available.

 Mobile phone is busy

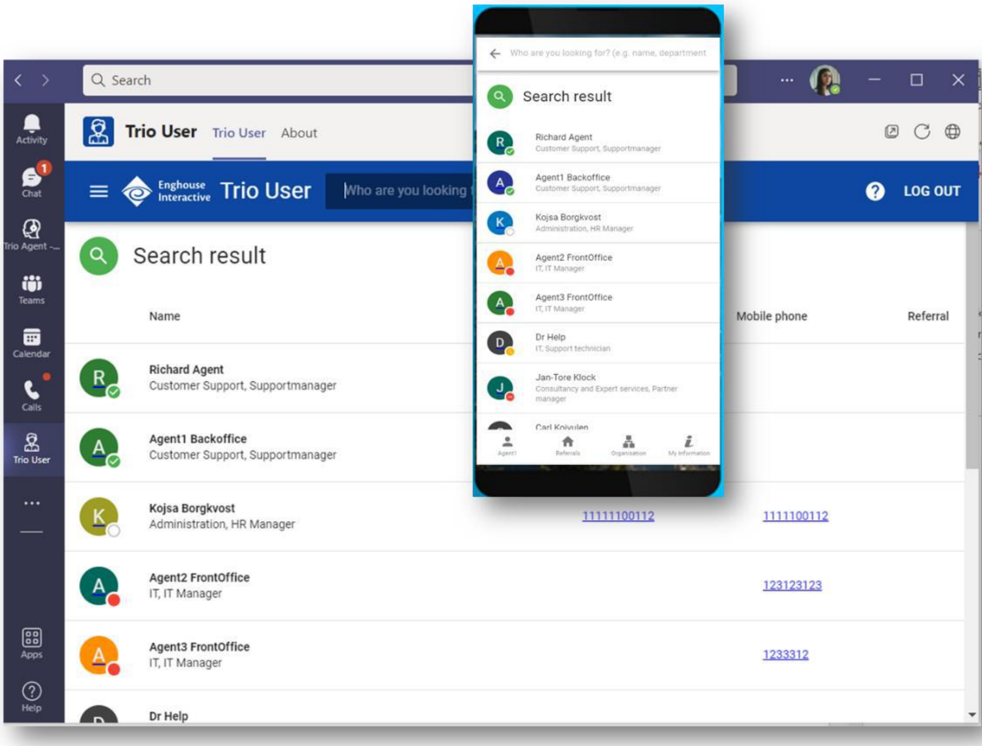
 Mobile phone is switched off or no service.



In case when the system is integrated with Microsoft SFB, Enghouse Trio is able to push the information to Microsoft SFB so that other Microsoft SFB Client users are able to view the status of a colleague cellular phone without having to dial the number.

5.2.4.1.1 Monitor and Updates Teams presence using the GRAPH api

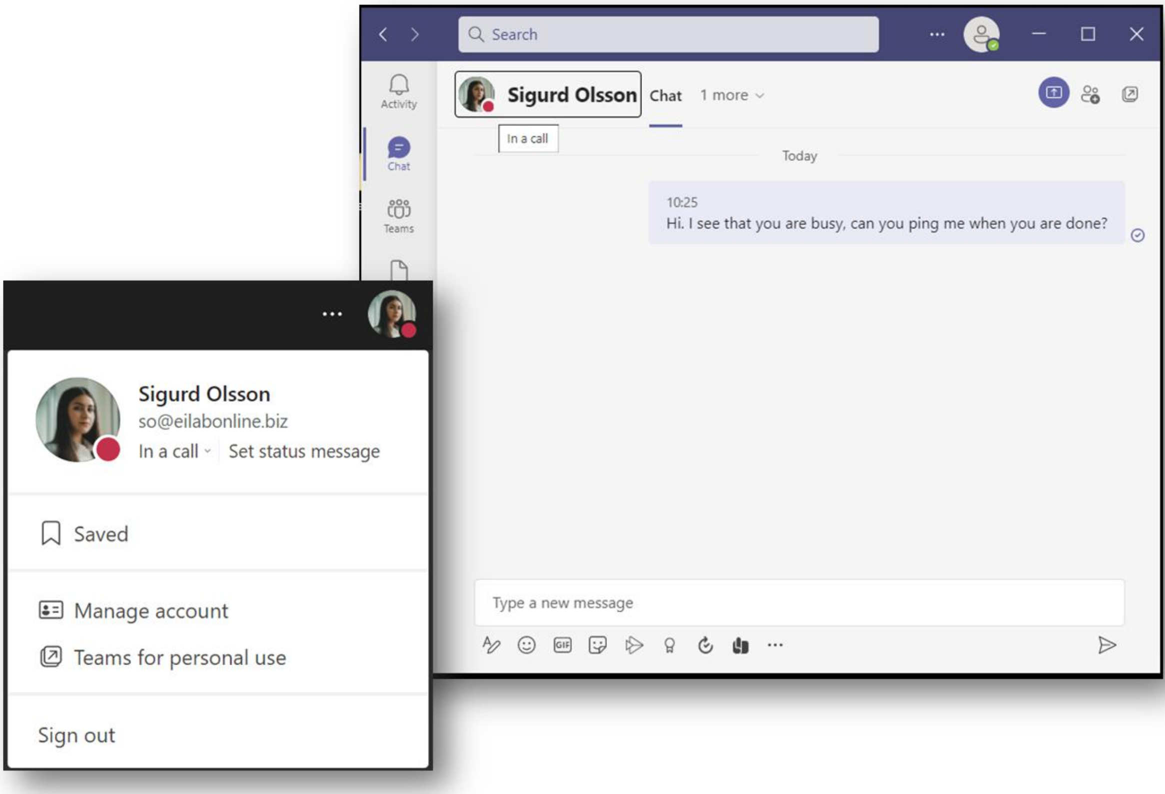
Presence is an important function when looking for good help right now, supported by chat and click 2 call most basic needs are filled.



Besides the ability to monitor Teams users' presence and display it for the colleagues, attendants and agents Trio 9.1 can also modify users Teams presence.

Trio 9.1 can update the user's presence in Teams based on Mobile line status (Eg put busy in call) without this integration the user will be seen as available when engaged in a mobile call.

This is an important feature in the case when the user is not using their Teams app to handle calls on their mobile.



In the case above Sigurd is shown as busy in call regardless of if it is a Teams call or if Sigurd is on a mobile call, Trio will set Sigurds presence to Busy in call.

Additional Information see the list of Service providers supported by Trio. Note that Presence status update will be kept by Teams for maximum 4 hours, for calls longer than 4 hours the presence will return to the state before the call started.

5.2.4.2 How is it licensed?

- One license per integrated Enterprise Directory user is needed.
- Enterprise Presence Connectionfor update of mobile line status in Microsoft SFB

5.2.4.3 Requirements

- Account with one by Trio supported operator
- Updates of the mobile line status are done over company's internet connection.

5.2.5 Trio User

5.2.5.1 Customer benefits

The new Trio User has a modern userinterface and user experience. Trio User has been developed on a common code platform that can be run on both a desktop/laptop computer, tablet/smart pad, and a smart phone. It is designed as a web page.

Trio User will let the user search for other colleagues, set referrals and administrate the voicemail in one easy to manage application.

5.2.5.2 How is it licensed?

Licensed per user

5.2.5.3 Considerations

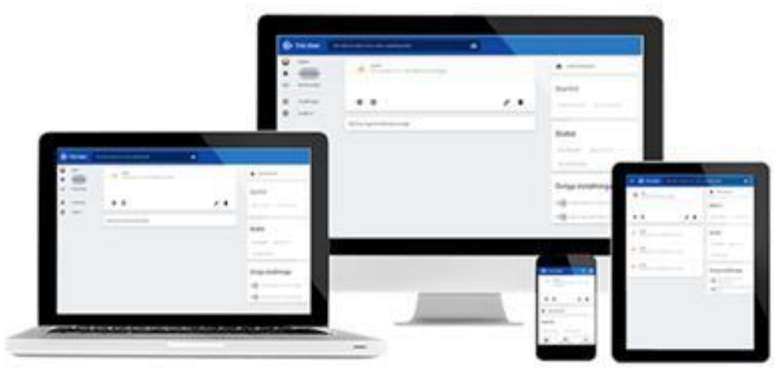
The program is located on the Enghouse Trio Server or on one or several of the DMZ servers. Users can use their web browser to access the application. Each user requires a username and password. Trio User supports Trio Single Sign on. When logging in from a smartphone with windows credentials, the domain and username needs to be written in manually by the user. Since Trio User is designed as a web page, there is no need for the users to download an app on their smartphone. The user will have to browse to the webpage and if they want, create a shortcut on the smart phone desktop.
Security is important. Enghouse Interactive strongly suggest to set up a proxy if the Trio User is supposed to be used on smart phones.

In Enghouse Trio the following functionality is not yet implemented in Trio User:

- Possibility to make a buddy list
- Possibility to see info tree
- Possibility to be secretary
- Possibility to listen to a voicemail from the phone if no softphone exist

5.2.5.4 How does it work?

The users browse to the Trio User web page. The GUI adapts to the screen, depending on the size of the screen.

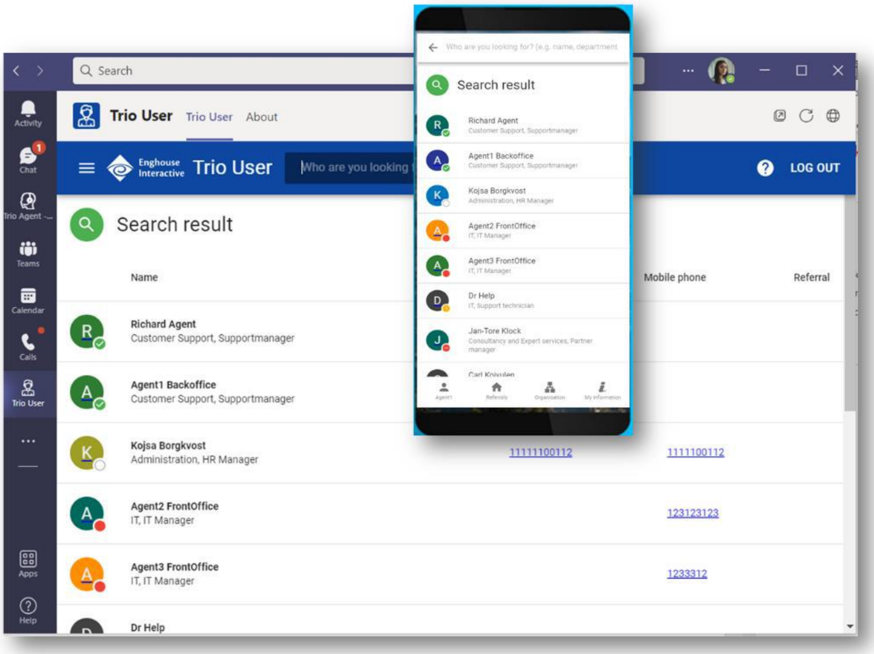


5.2.5.4.1 Home page

The home page will display if the user has any referrals. The possibility to set referrals by using Favorites and to create the Favorites are also locatates on the home page.

Favorites are set by choosing a whereabout code and time when to be back. Favorites can be deleted or edited.

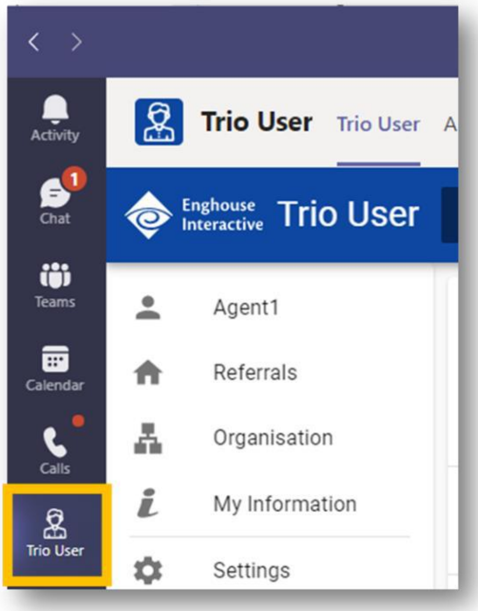
Smartphone view:



5.2.5.5 Apps for Teams - Trio User

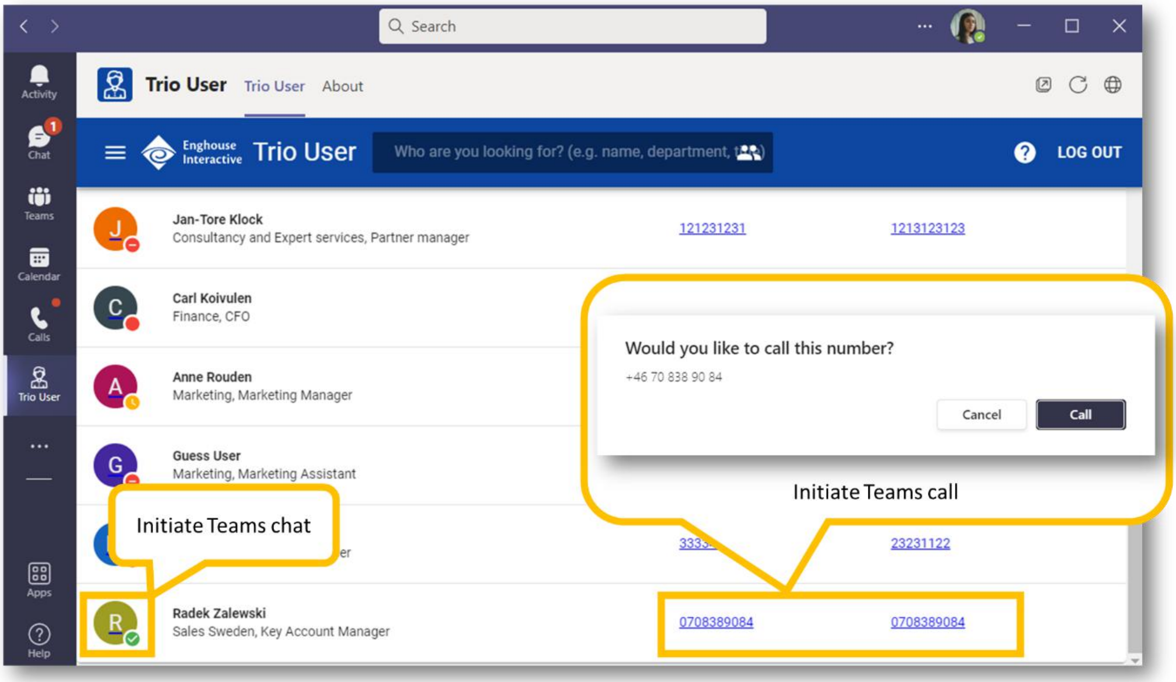
As a Team user with Trio user as an app, you can now easily not only start Team chats or conversations but also send text messages or even paging if your Trio solution has these channels active.

When the user needs to find competence outside of their immediate team they no longer have to switch to another program, everything is available from the left hand menu.

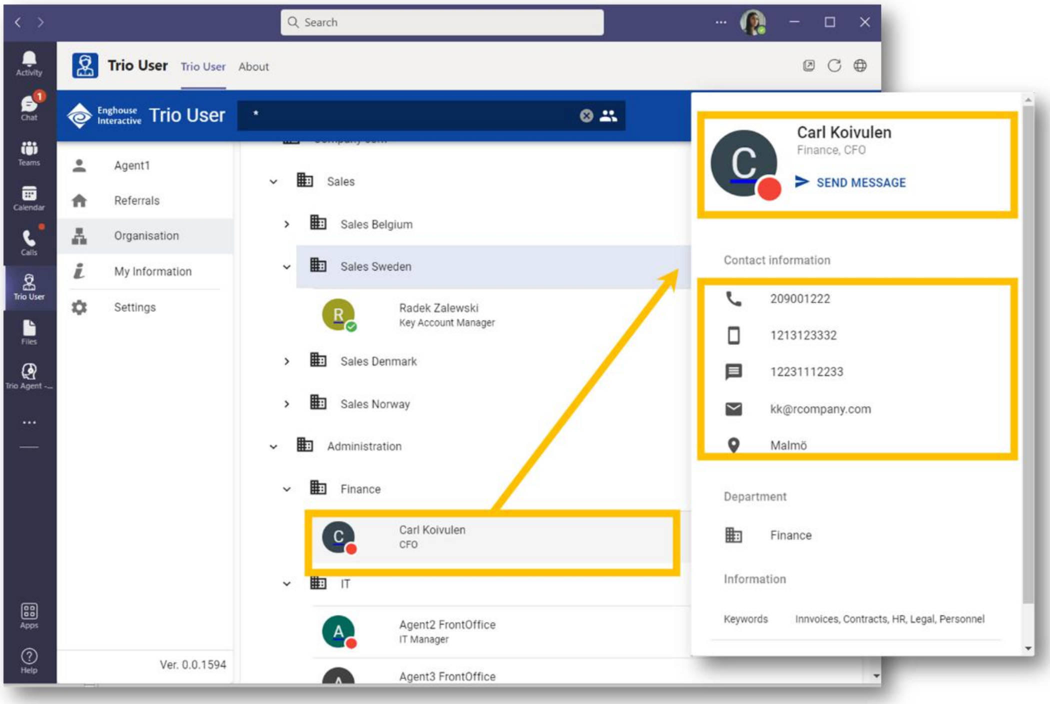


Persons that are not agents can use the Trio User

- Quickly search for colleagues based on information that agents and operators have.
- Browse the organization defined in the directory to select the best suitable persons based on their availability.
- Initiate Teams chats and make Teams calls based on information.



- Send SMS through Trio channels and if available Pager is also available as a messaging channel.



Other important features are:

- To be able to administer their referrals in Trio User.
- Add and remove the keywords that best fit my responsibilities and skills in the organization

5.2.5.5.1 How does it work?

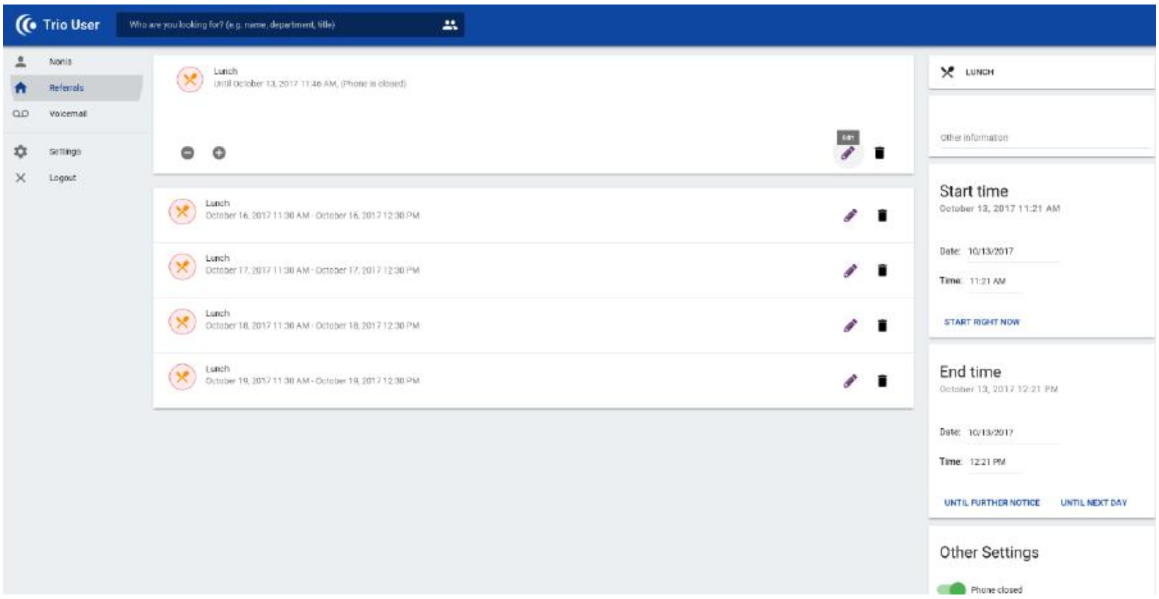
Teams can be regarded as a browser when Trio User is run as an app. Teams opens a web page in a tab, and the address to the web page is the external address to Trio User. This address is the only information that is shared with Teams. Trio User shares no information with Teams, and Teams shares no information with Trio User.

The zip file that is uploaded to Teams contains a manifest file where the important part is the address to Trio User. The zip file also contains some icons and the description of the app that is displayed in Teams, but not much more.

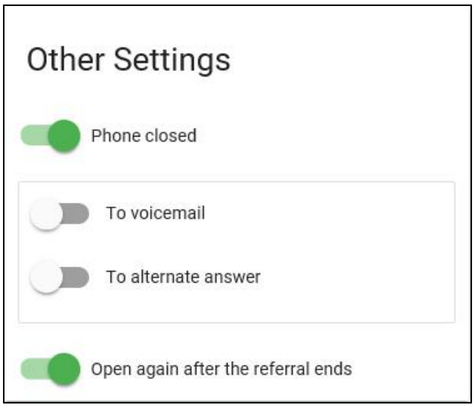
To handle the login procedure, Microsoft Teams JavaScript client SDK is used. But again, no information is shared since the login is done against the Trio system.

5.2.5.6 Referral page

On the referral page the current and future referrals for the logged in user are displayed. It is possible to create new referrals and to delete and edit current ones.



A referral is set by choosing referral code, start time, end time and other settings depending on if the system is configured with PPM (personal phone manage). Other settings are:



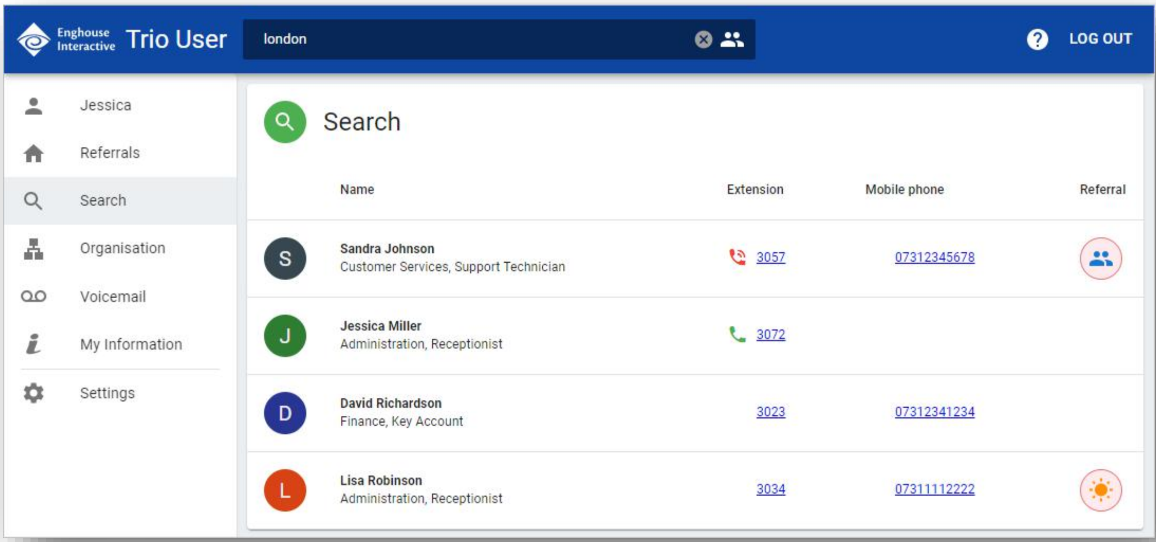
Select how your extension should react on just this referral.

5.2.5.7 New Search and display

Trio User support multi field search. This means that the user can search for words and get hits from the following fields: First name, Last name, extension, title, customer group, department, location, mobile number, phonetics 1-5, Extrafields 1-20, E-mail address and keywords.

The search box is always available on top of the page. When the search results is presented the user can see if the colleagues are busy on their phone or mobiles and what presence status they have, if the presence integration, line state integration and/or mobile line state integration are configured.

Desktop view:

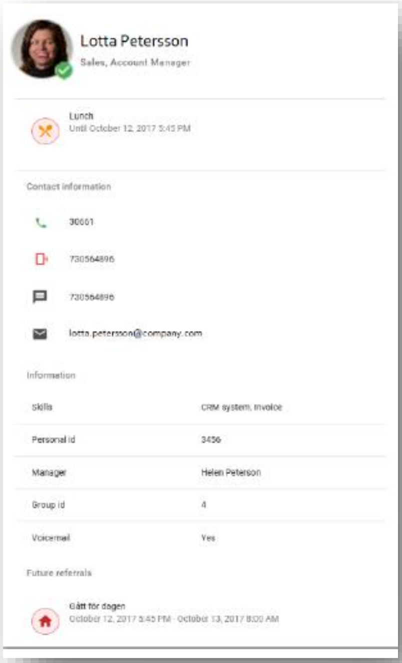


The search is made from the beginning of the words. For example a search for “hel” will get hits for names such as “Helen” and “Hellberg” but an email address like “mary.black@hello.com” or a department name “Support Hello” will not be found.

The columns in the search result are: Name, Department, Title, Extension. Mobile phone and E-mail. The user cannot change the columns.

It is possible to have photos on each user.

With one easy click, the user will get more information of one specific colleague.

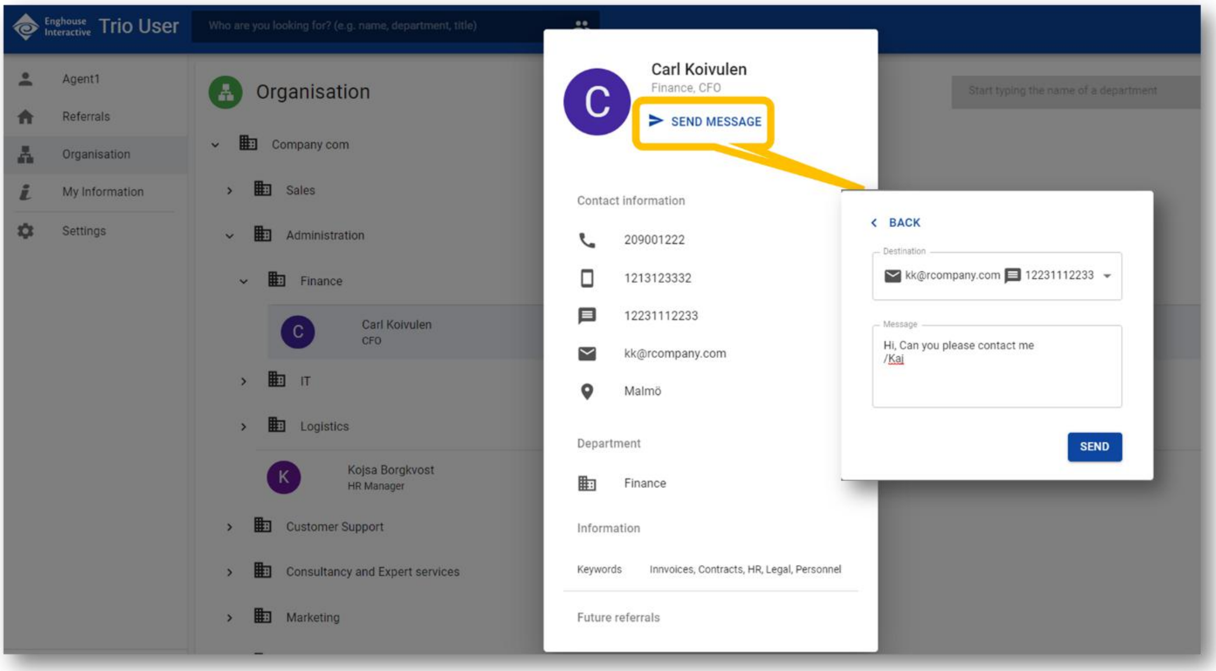


Information shown are:

- Name (photo if present)
- Department
- Titel
- Extension
- Extension information
- Mobile number
- SMS number (SMS can only be sent from devices that has SMS support)
- Skills
- Extra fields
- Current and future referrals
- Skype or Teams Presence status (if configured)
- Line status (if configured)
- Mobile line status (if configured)

5.2.5.8 Send messages via Trio User

In a similar way as in Trio Agent the user can send messages via various channels, this can be SMS, e-mail or even pagers in Trio User.

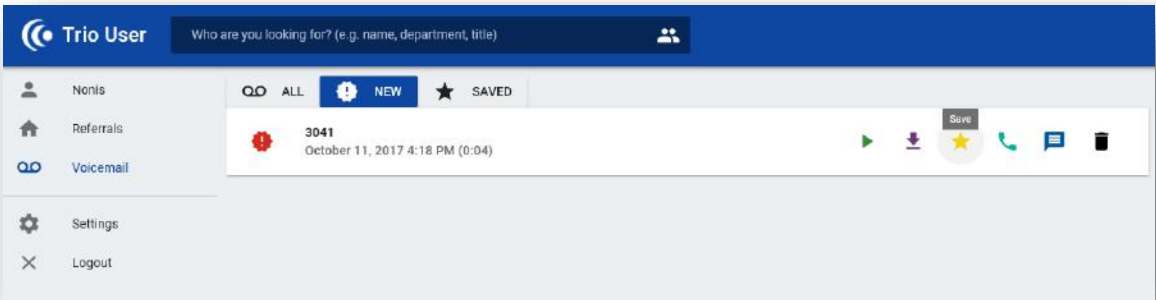


An all in one message management is in many cases necessary for users in health care or in another public sector. Due to this, a common solution for both Agents and users has been developed.

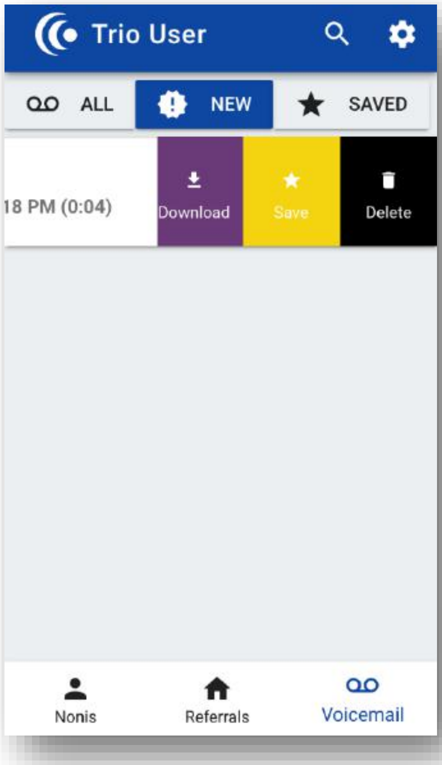
5.2.5.9 Voicemail

The user can administrate their Voicemail in Trio User. It is possible to listen, save, download, call the extension that left the message, send an sms (only available on devices with sms functionality) or delete the voicemail.

Desktop view:



Smartphone view with “swipe” functionality:



5.2.5.10Settings

Available settings for the users are:

Choose language: The user can choose from English, Swedish, Norwegian, Danish and Finnish.

Change Trio password: The user can change the Trio password. (The possibility to change password can be removed)

Referral settings (if PPM is activated): Select how the extension should react to each of the different referral codes. The settings you choose here will affect referrals that are set anywhere– - from user clients, from the attendant or from the calendar.

Voicemail settings: Choose if when abscense the call will be directly to voicemail or not.

5.2.5.10.1 The user can manage their keywords in Trio User

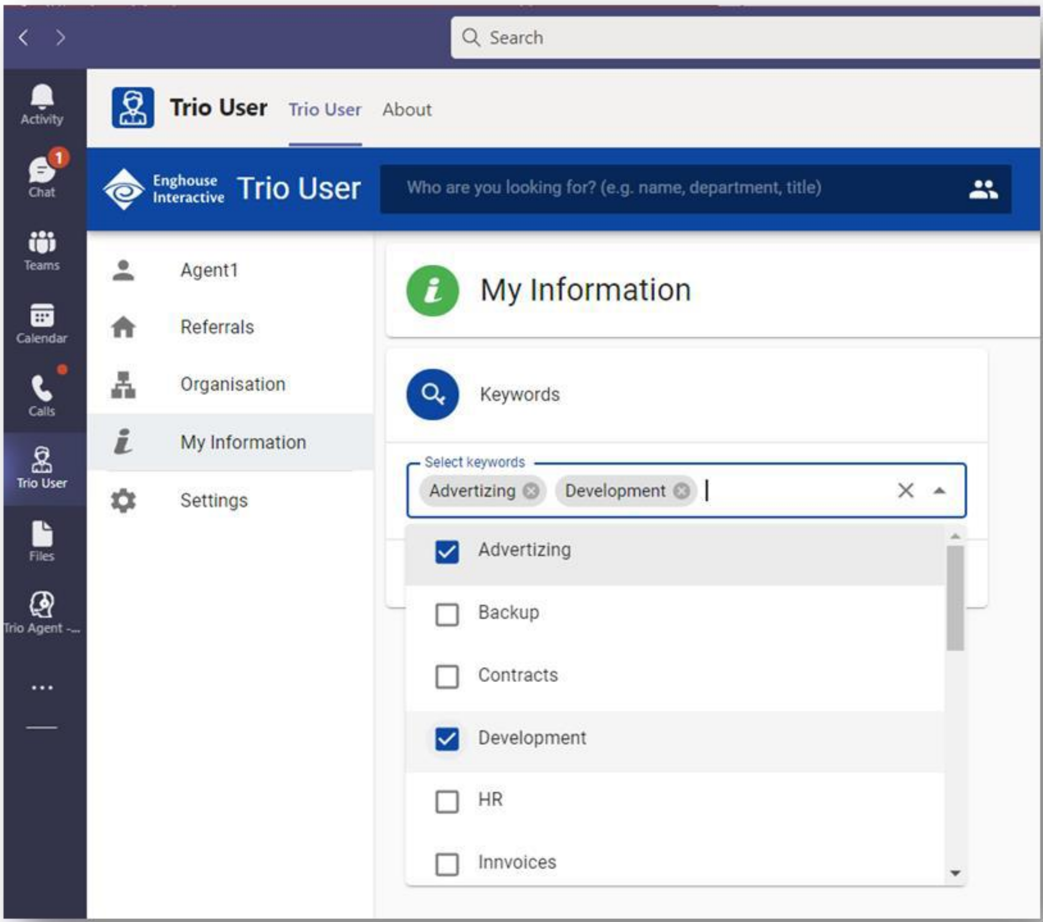
An updated directory is the key to find the right persons. Operators and colleagues rely on this to get the right assistance.

Keywords are an important part of the directory, these are used to answer questions like:

- Who should I talk to about this type of account?
- Who works with what?
- You need to quickly find the right person.

In Trio 9.1 you can in Trio User specify which predefined keywords suit you without having to contact an administrator. As a user, I can speed up the procedure for my colleagues to find me based on my expertise.

This is a perfect feature for Trio User which in 9.1 is also available as a Teams App.



We should keep in mind that even if we automate the management of keywords based on integration with HR systems and similar the users will always like to fine tune the information.

5.2.6 Assistant for Web

Assistant for web has been replaced by Trio User.

5.2.7 Trio Guest

5.2.7.1 Customer benefits

Trio Guest is a web application that allows anonymous access to the company directory. This is a perfect tool for the organisation to publish selected information about the employees to external viewers, for example for municipalities to show an overview of their staff and the staffs' responsibilities.

Trio Guest is based on Trio User, but offers limited functionality. It adapts to the size of the window, which means that it can be run on both PCs, tablets and smartphones. The appearance of Trio Guest, i.e. logotypes, colours and the application title, can easily be changed to match the customer's profile.

5.2.7.2 How is it licensed?

It's based on the Enterprise Directory License.

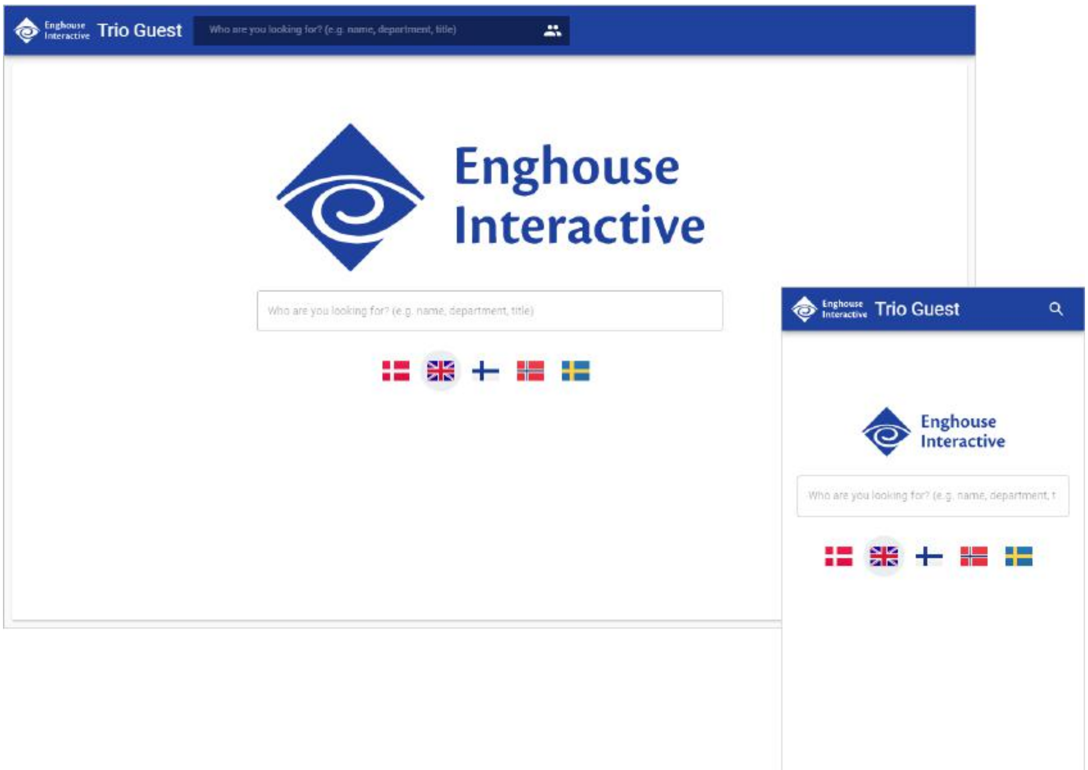
5.2.7.3 Considerations

Trio Guest is located in IIS on the Enghouse Trio core server or on one or several DMZ servers. If Trio Guest should be externally accessible, it is recommended to run the application on a DMZ server.

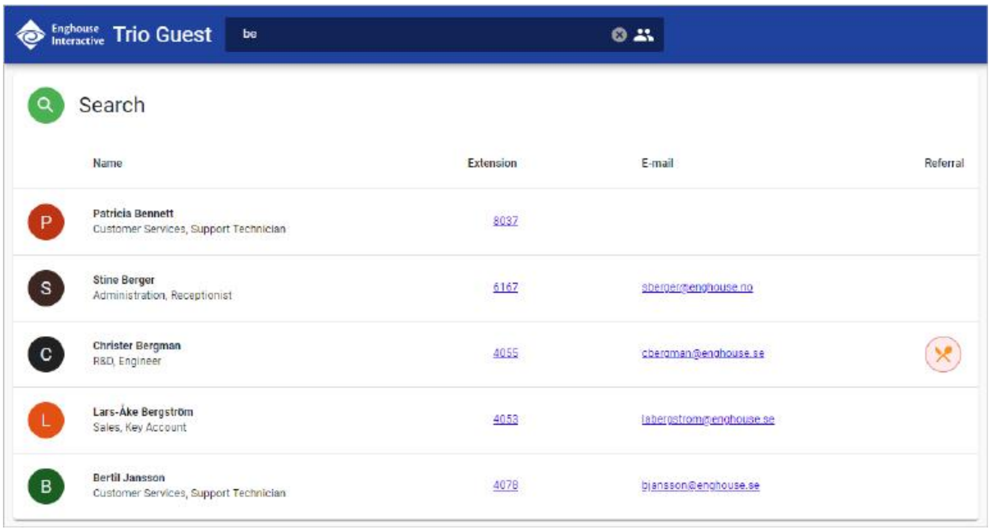
Even if there are multiple instances of Trio Guest, they all use the same configuration, including what fields and users to display.

5.2.7.4 How does it work?

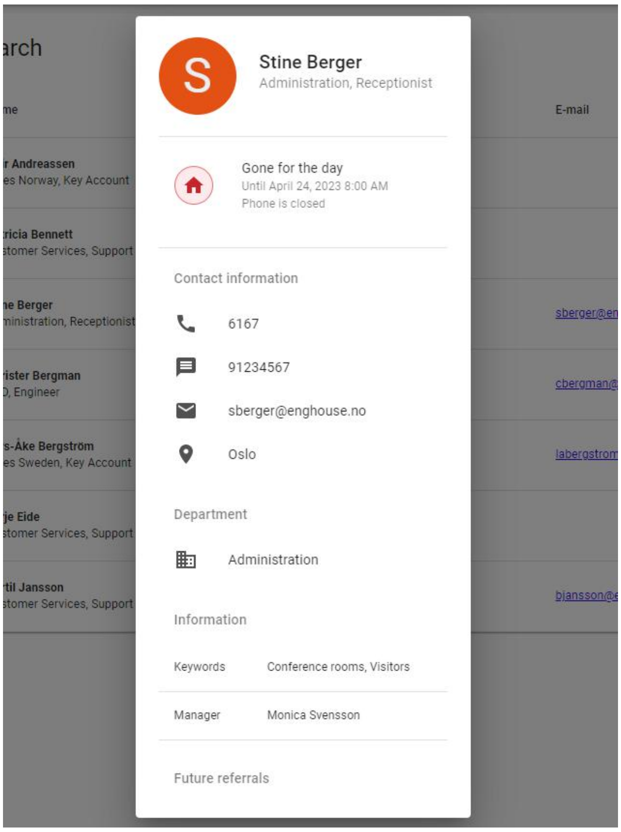
The users browse to the Trio Guest web page, usually on the URL http://<servername>/TrioGuest. The Trio Guest start page is then displayed. On the start page, the user can perform a search in the Company Directory and select language for the application. Available languages are English, Swedish, Norwegian, Danish and Finnish.



Searching in Trio Guest works just as in Trio User, i.e.multi field search in most available fields.

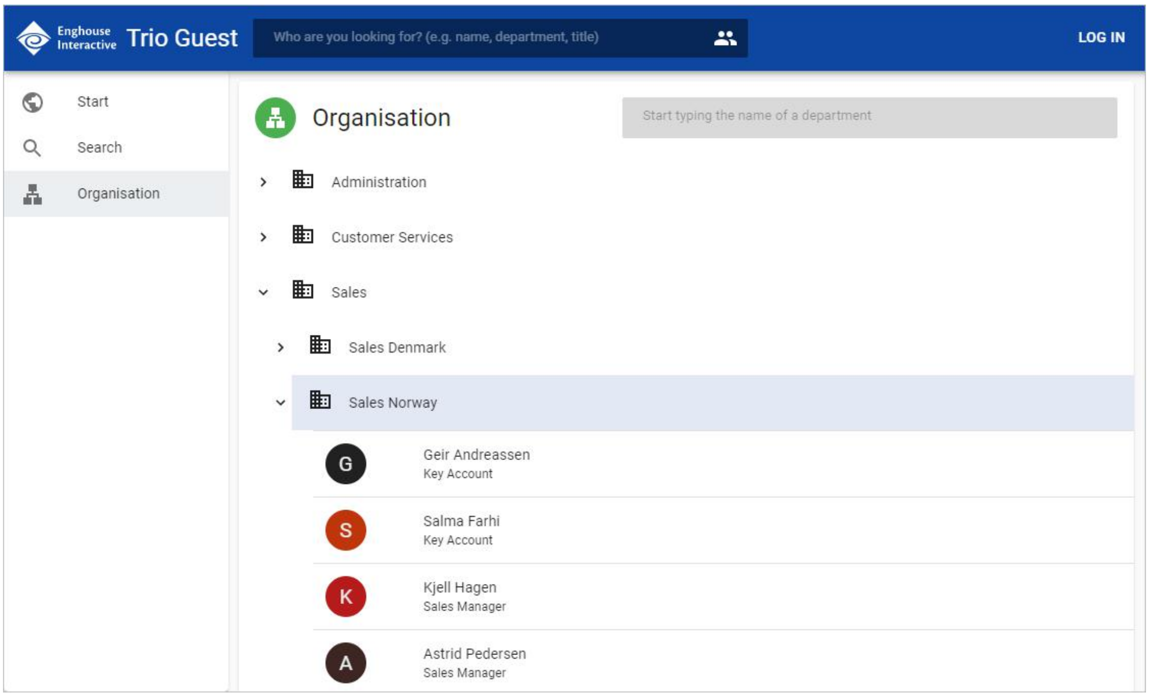


Clicking a phone number or email address in the search result initiates a new call/email using the default phone/email application on the device. Clicking a user in the search result displays a detailed view of that user.



Which user data that are displayed in Trio Guest can be configured in the Trio administrative tool. Individual users can also be hidden.

Trio Guest can be configured to display the organisation tree. If so, a menu to switch between the pages is displayed to the left. A button to let the user log in to Trio User can also be enabled in Trio Guest.



5.2.8 Enterprise Voice

5.2.8.1 Customer benefits

Enterprise Voice enhances the internal and external services, regarding voice services. Enterprise Voice consists of several functions, described below.

- VoiceGuide, spoken presence event
- VoiceMail, Enterprise Voicemail system
- Voice Mail Connection, connection to third party voice mail system

5.2.8.2 How is it licensed?

Enterprise Voice is licensed per user of VoiceGuide/VoiceMail.

5.2.8.3 Special consideration

- Calls handled by Enterprise Voice requires P004110 Enterprise Line licenses
- If connected to the PBX using QSIG connection, the system requires voice cards to process audio
- For connection to Cisco Call Manager, Enterprise Voice is necessary, to enable referral by entering DTMF codes on your phone key board *23*

5.2.8.4 How does it work?

VoiceGuide
VoiceGuide provides information for the caller about the status of the called extension. A voice will inform whether and why the extension is closed, and when it will be open again. The caller will have the possibility to be connected to voice mail, alternate answering, a mobile phone or an operator.
VoiceGuide is a superior way to inform internal and external callers about forwarding information, and deliver quick and professional service by voice. Internal users may also use VoiceGuide to present their forwarding information.

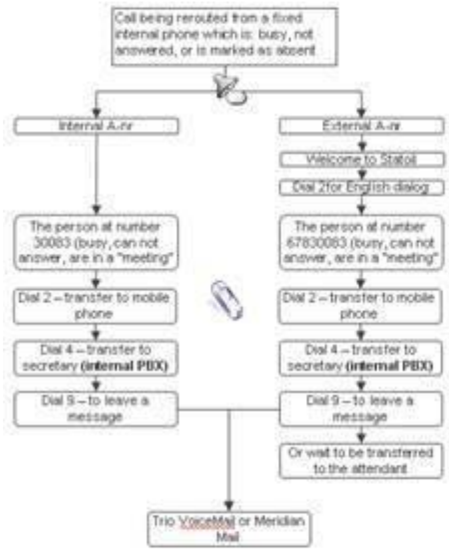
The different options in voiceguide are administered in Interaction Studio where the technician can change the default choices to modify the flow, for example switch the meaning of button 2 that is transfer to Mobilephone to transfer to Voicemail. It will be also possible to change the default destination from Attendant to Voicemail that is a greatly appreciated feature.

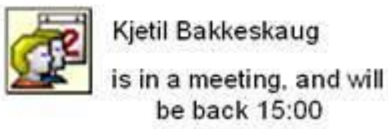
- VoiceGuide – forwarding information.
  When external or internal party calls a forwarded extension, they will get information about the forwarding cause, and when the employee expects to be back.

Default Codes	
Code	Icon
Lunch	
Left for the day	
Out on Business	
Meeting	
Business trip	
Part time	
Vacation	
On leave	
Temporarily out	
Ill	
Other	
Additional Codes (require consultancy)	
Caring for ill child	N/A
Working at home	N/A
Has a visitor	N/A
Busy	N/A
Parental leave	N/A
Training course	N/A
Visiting a customer	N/A
Off duty	N/A
Returns at hh:mm	N/A
Returns on MMDD	N/A

- VoiceGuide – Connect to mobile phone.
  When an external or internal party calls a forwarded extension, he will get the option to be connected to the employee’s mobile phone.

- VoiceGuide – Leave message in Voicemail.
  When an external or internal party calls a forwarded extension, he will get the option to be connected to employee’s voicemail to leave a message.
- VoiceGuide – Connect to attendant.
  When an external or internal party calls a forwarded extension, he will get the option to be connected to the operator for more service.
  - This is the default option for Enghouse Trio, the default option can be easily switched to for example Voicemail or Auto Attendant
  - The phrases “To be connected to an operator, please wait” “you will now be connected to an operator” can be changed, for example to ’To be connected to customer service, please wait’ and “you will now be connected to customer service”
  - It is possible to switch the default destination. The following choices are also available; “To be connected to an operator, press 9” and “To be connected to customer service, press 9”
- VoiceGuide – Connect to automatic attendant. (Requires P0311XX Auto Attendant)
  When an external or internal party calls a forwarded extension, he will get the option to be connected to the automatic attendant, if enabled.
- VoiceGuide – IM input
  Employees may use IM input to present their forwarding information by calling VoiceGuide and stroking DTMF commands. It is possible to configure the service to be reachable both internally and from PSTN.





- Voice Guide- Missed calls

A missed called due to that the mobile phone has been out of reach or the caller didn’t leave a message, if configured for the extension, an sms or e-mail will be sent to the extension owner.Trio VoiceMail is an excellent alternative to platform dependant voice mail systems. Enterprise Voicemail provides voice mailboxes on the Trio server. The user can administrate the mailbox from a telephone and/or the Web Client. Besides listening to the voice messages, the user can forward, save or delete the messages. It is possible to open or close the mailbox, and to change the personal message.

- Possibility to configure that the referral reason and/or the end time will not be read. This can be useful for customers who use non-closing referrals and do not want callers to get the specific Voice Guide information.

Using a phone, users can set presence events on their personal extensions.
Enterprise VoiceMail Connection is used together with Trio VoiceGuide, when VoiceGuide has to connect calls to an external voice mail system. Enterprise Voicemail connection is licensed by the number of Voice Mail boxes in the external system.

Hardware is not included; see voice card prices.

VoiceMail
VoiceMail is an excellent alternative to platform dependant voice mail systems. Voice mail provides voice mailboxes on the Enterprise server. The user may administrate the mailbox from a telephone and/or the Web Client. It is possible to open or close the mailbox, and to change the personal message.

- Voicemail – Listen by phone.
  Employees may call a dedicated phone number, to listen to their voicemail messages.
- Voicemail – Listen by web.
  Employees may listen to their voicemail messages, by logging on to Assistant for web.
- Voicemail – Optional functions.
  Employees may forward their messages.
  Employees may save their messages.
  It is possible to fast forward and rewind messages.
- Voicemail – Notification by e-mail.
  Employees will receive an e-mail when they get a new message in voicemail.
- Voicemail – Notification by SMS.
  Employees will receive an SMS when they get a new message in voicemail.
- Voicemail – Message waiting.
  Voicemail can notify an employee, by turning on “message waiting” lamp, on the extension. (not applicable on all SIP connected PBX:es, see teq rech for more infor

When receiving a mail or sms with incoming voice mails the A-number (calling number) will be presented. Also when listening to the voicemail the A-number will be read before the message is played. This will give the users the option to call the person back that left the message even if they didn’t leave any number. The text is possible to configure in 4 different languages. The message will be delivered in the language configured in the users VoiceGuide Profile.

VoiceMail connection
Trio VoiceMail connection enables integration from VoiceGuide to a third party voicemail system. When a caller gets forwarding information and decides to leave message in voicemail, the call gets transferred to the third party voicemail system.
VoiceMail connection works with the following VoiceMail systems:

- Cisco Unity
- Mobile Operators such as Telia Sonera and Tele 2

5.3 Enterprise (Info) Directory License Art.No. TRIO-P022210

5.3.1 Customer benefits

If the customer has extensions that are not part of the PBX or part of the PBX but no user is connected to the extension this license will give the Agent Attendants and other users the ability to search for the extension in the database. The license only includes a post in the database and the import/Export and LDAP functionality. No user clients are part of the license.

5.3.2 How is it licensed?

By the number of extensions in the Enterprise Directory database.

5.4 Microsoft Teams

With Microsoft Teams there are number of ways to work with Enghouse Trio, som ecustomers select telephony to be delivered to their mobiles and user Teams for collaboration only, some integrated Teams with their local PBX or combine these with mobile subscriptions.

In all cases Enghouse Trio can monitor Presence in Teams and display it for clleagues or agents.

Note that Trio can not update presence status for Teams users the same way as was available with Skype for Business on premises.

For details please see Comparison of Skype for Business with Teams

Depending on integration between Trio and Microsoft Teams different Trio functionality can be offered, for this please see comparison of Trio with Microsoft Teams SIP vs GRAPH API

5.5 Microsoft Skype for Business

Enghouse Trio can proudly present connections with Microsoft Skype for Business 2015 and 2019.

1) Enghouse Trio connected to SfB via UCMA
2) Enghouse Trio connected to SfB via UCMA and SIP (hybrid)

A Trio component, Trio MSPL, has to be installed on the MS SFB Front end server. The Trio MSPL application runs as a service in the front end server(s) with local administrator rights. This is because the application needs to run with certain privileges in order to communicate with the Front end server. The communication is SIP based controlled by a Microsoft Service Agent dll which advises the application of the SIP messages that it subscribes to.

NOTE In deployments with Microsoft SFB using UCMA interface the Auto Attendant and Enterprise Text To Speech cannot be deployed, if this functionality is needed the system shall be deployed with gateways and SIP. The Voice mail boxes provided from Microsoft, Exchange UM, will work in a SFB and Trio system using UCMA.

5.5.1 How is it licensed?

- One license per integrated user in the Enterprise Directory

Requirements

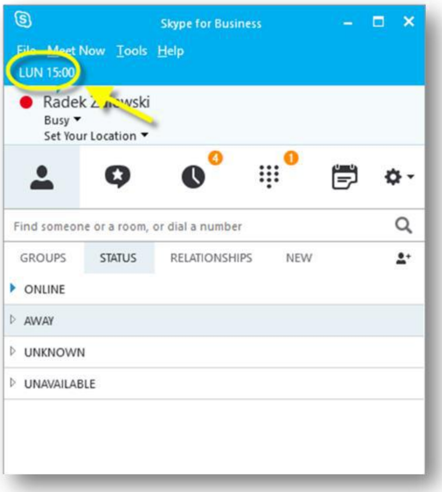
- Enterprise User License
- Microsoft SFB server
- Teams account
- Cisco Unified Presence Server 7

5.5.2 Special Considerations

In environments with SFB Server it is recommended to use Enghouse Trio calendar connection with Microsoft Exchange. The Auto Attendant and Enterprise Text To Speech cannot be deployed in a system using only UCMA.

5.5.3 Referral handling and Callhandling with Microsoft SFB

In Enghouse Trio it is possible for Trio to forward the SFB Extension the same way as it is possible with other PBXs. In the SFBClient the user will have to write the referral code in the “Whats happening today-field”. The referral will be sent to the Trio system and the extension will be closed and sent to Enterprise Voice where the caller will get information and the choices to be connected to Voice mail, Operator or other number.

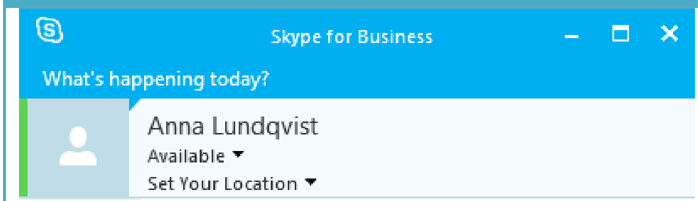


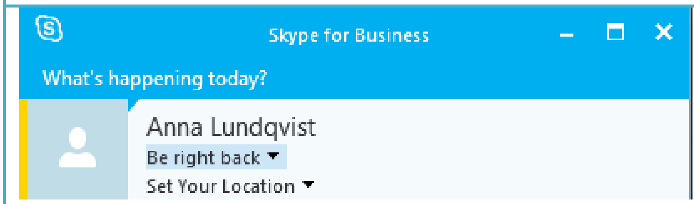
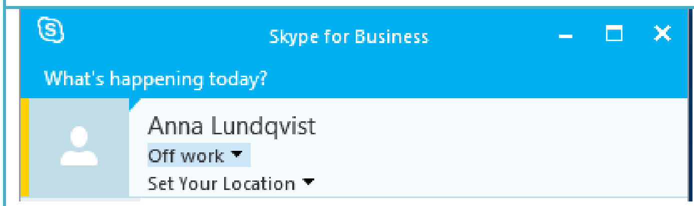
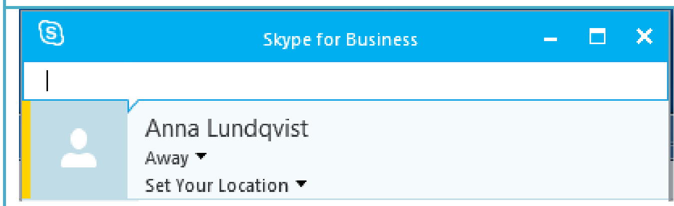
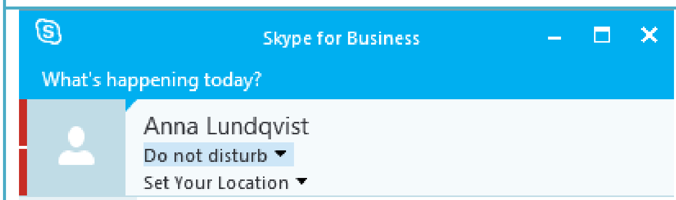
Trio advice the customers to also use the Trio Calendar Connection. Then the Microsoft SFB Client will have the status Busy when the referral is active. The SFB extension can be forwarded as any other PBX extension to Voice Guide which will offer Voicemail, forward to another extension or Attendant service to the caller.

The attendant can “camp on a busy extension” and will get callbacks if the extension is still busy.

The Trio system will monitor the SFB Client status and send the call to Voicemail if the extension owner does not answer.

Below is a table showing what will happen according to the Skype for Business status of the person who someone is calling:

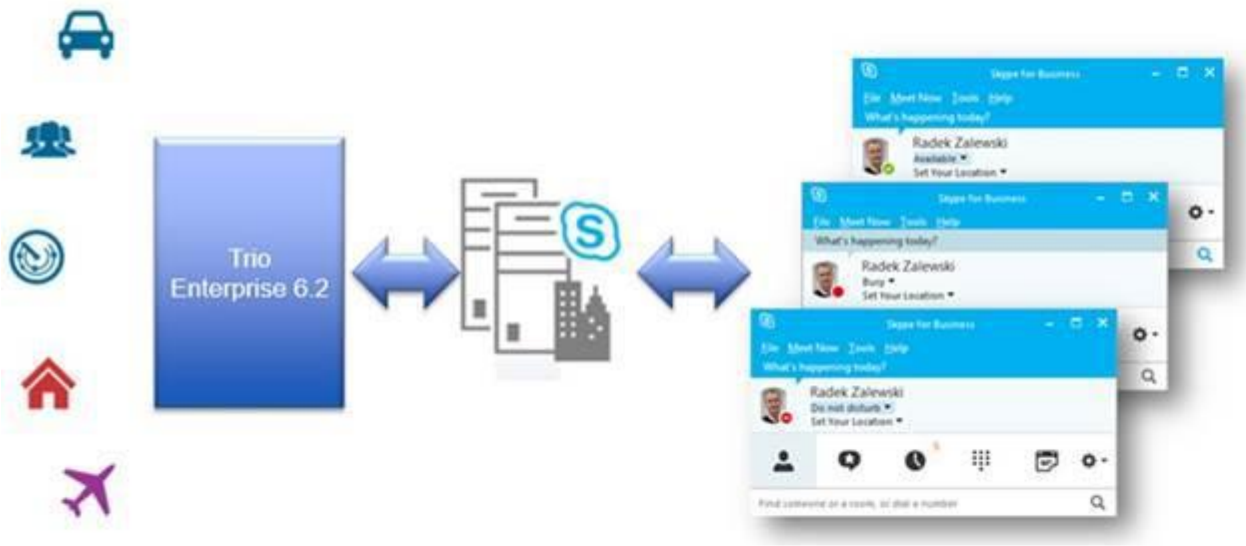
SFB Status	Direct Call
 Availabl– - No answer	Call is sent to VoiceGuide ”not available” Attendant gets flash on B-Number.
Status	Direct Call
 In a call – No answer	Call is sent to VoiceGuide ”Busy” Attendant gets flash on B-Number.

Status	Direct Call
 Busy – No answer	Call is sent to VoiceGuide ”Not available” Attendant gets flash on B-Number.
Status	Direct Call
 Be right back – No answer	Call is sent to VoiceGuide ”Not available” Attendant gets flash on B-Number.
Status	Direct Call
 Off work – No answer	Call is sent to VoiceGuide ”Not available” Attendant gets flash on B-Number.
Status	Direct Call
 Away – No answer	Call is sent to VoiceGuide ”Not available” Attendant gets flash on B-Number.
Status	Direct Call
Offline – No answer	Call is sent to VoiceGuide ”Not available” Attendant gets flash on B-Number.
Status	Direct Call
 Do not disturb	Call is not sent to TE

5.5.4 Enghouse Trio Absence and Presence Connection in Skype for Business

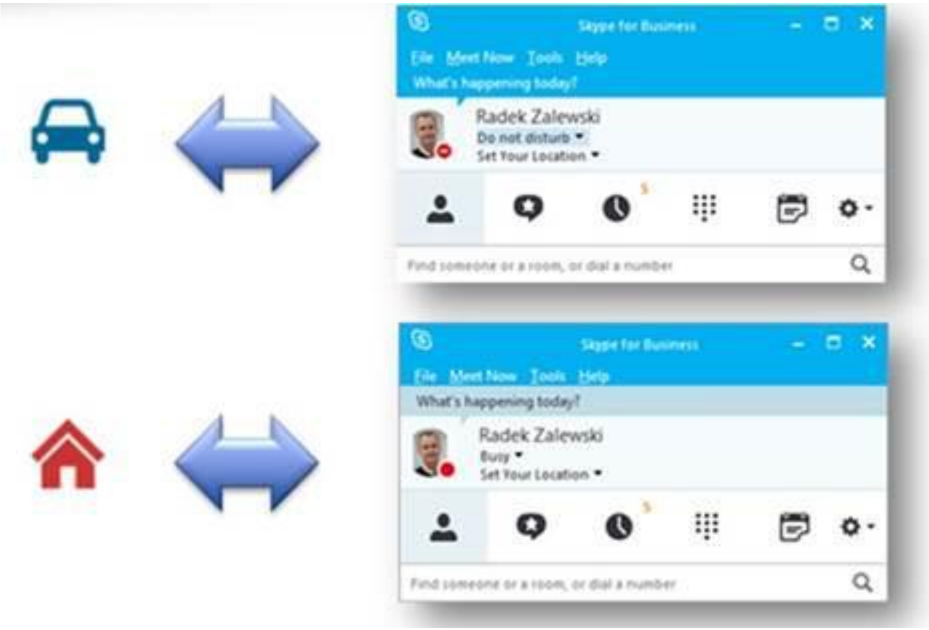
5.5.4.1 Customer benefits

Many customers see the need and benefits to integrate the classic referral handling with the presence status of the Microsoft skype for business users. Therefore the referral functionality of Enghouse Trio is tightly integrated with Microsoft Skype for Business server, letting the users by settings absence (referrals such as lunch, meetings etc) to change the Skype for Business status will remove the absence.

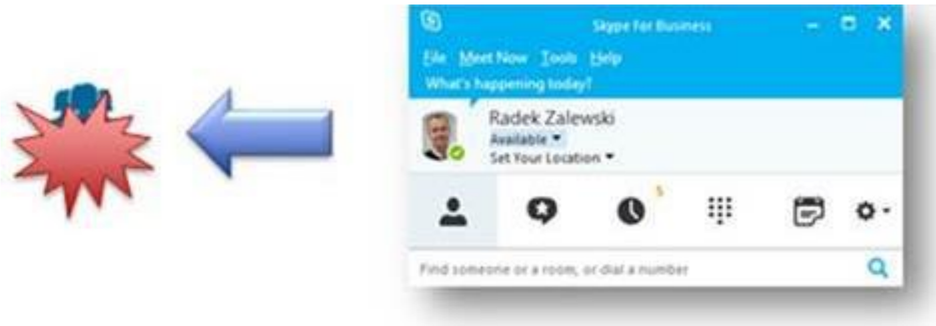


5.5.4.2 How does it work?

The Trio technician can define what code shall set what presence, for example a meeting can set the status to busy while a gone for the day will set the status to do not disturb. The definition is made on system level per referral code by a technician. The choices are; none, busy and do not disturb. In the following example a business trip set by the user will result in the presence status Do not disturb in the Skype for Business client and a Gone for the day absence will result in a busy status in Skype for business.



When a referral is active and the user updates his/her status to available (green) the active referral will be removed.



When a referral is active and the user changes the Skype for Business presence status to anything else than Available, and when the referral expires or is removed in Enghouse Trio the last set presence status will be kept in the Skype for Business client.
Example: A meeting will set “Do not Disturb”. The user change to “busy” while the referral is active. When the referral expires, busy will be kept as the users presence status.
If a referral is removed from Enghouse Trio, using web, calendar or other clients the Skype for Business presence status will return back to the same state as it was in before the referral became active.
Example: A user has the status “busy”. A referral is setting the status to “Do not disturb”. When the referral is removed by Enghouse Trio the “busy” status will be set.

5.5.4.2.1 Overriding the presence status

Some of the status codes such as “away” will need special handling and therefore an override functionality is available where the Enghouse Trio will basically override the user’s presence. For example in a case when the user leaves the building with an active referral. With override the presence state will be forced by the Enghouse Trio system to the value selected for the referral regardless of what presence state is active.

Example: A user has a referral and the status is set to “busy”. The user leaves the building/locks the computer. Then the SFB presence will be “away”. We can then NOT display “busy”, the users presence will be “away”. The override flag will only be used when setting a referral.

5.5.4.2.1.1 Overview of the different presence statuses with or without override

The picture below gives an overview of how the different status will be set and shown for other Skype for business users when the user has an active referral based on either override and not override being used in the Enghouse Trio system.

The matrix is on the top showing the SFB presence status that the user had when the referral is turning active.

Example: A user has “away” when the referral is being active. If the override function is NOT used the user will stay “away” even with the referral that is configured to set “busy”. If the override function is used the presence will be set to busy.

	Presence State in Skype for Business client	Available	Busy	Do not disturb	Be right Back	Off work	Appear Away	Offline	In a meeting	In a call	Presenting
The following states will be displayed when Trio Enterprise does NOT use the override flag when setting presence for a user											
1	When a Referral is active giving busy (With override = false)	Busy	Busy	Do Not Disturb	Be Right Back	Off work	Away	Same as previous state or		In a call	Presenting
2	When a Referral is active giving DND (With override = false)	Do Not Disturb	Do Not Disturb	Do Not Disturb	Be Right Back	Off work	Away			Do Not Disturb	Presenting
The following states will be displayed when Trio Enterprise does use the override flag when setting presence for a user											
8	When a Referral is active giving busy (With override = true)	Busy	Busy	Busy (men kan ej starta chat)	Busy	Busy	Busy	Busy		Busy	Busy (men kan ej starta chat)
9	When a Referral is active giving DND (With override = true)	Do Not Disturb	Do Not Disturb	Do Not Disturb	Do Not Disturb	Do Not Disturb	Do Not Disturb			Do Not Disturb	Do Not Disturb

It is worth to note the handling of presence states *Be right Back, Off work, Away, Presenting and Do Not Disturb* in some of the combinations.

Also note that the override is a system level parameter for all codes while Do not Disturb or busy is configured per referral code on a system level, these parameters are configured for all users and are not user unique.

Presence updates made after that Enghouse Trio has updated the users presence

If a user updates presence themselves after that Enghouse Trio has updated their presence it will be kept as set by the user, the only presence status that removes the referral is Available.

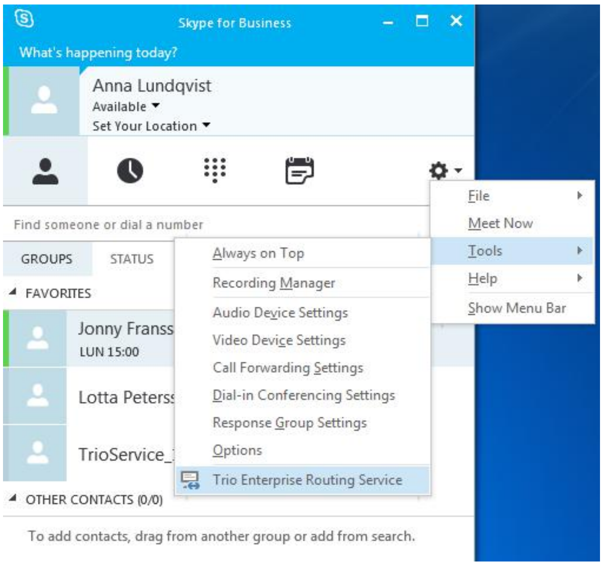
Note that when the user leaves their computer, Skype for business will update their presence status to Away or set the user as *Offline* when they shut down the PC. This new presence will be displayed for the colleagues regardless of if override has been used or not.

The Absence and Presence connection supports Microsoft Skype for Business 2015 and 2019

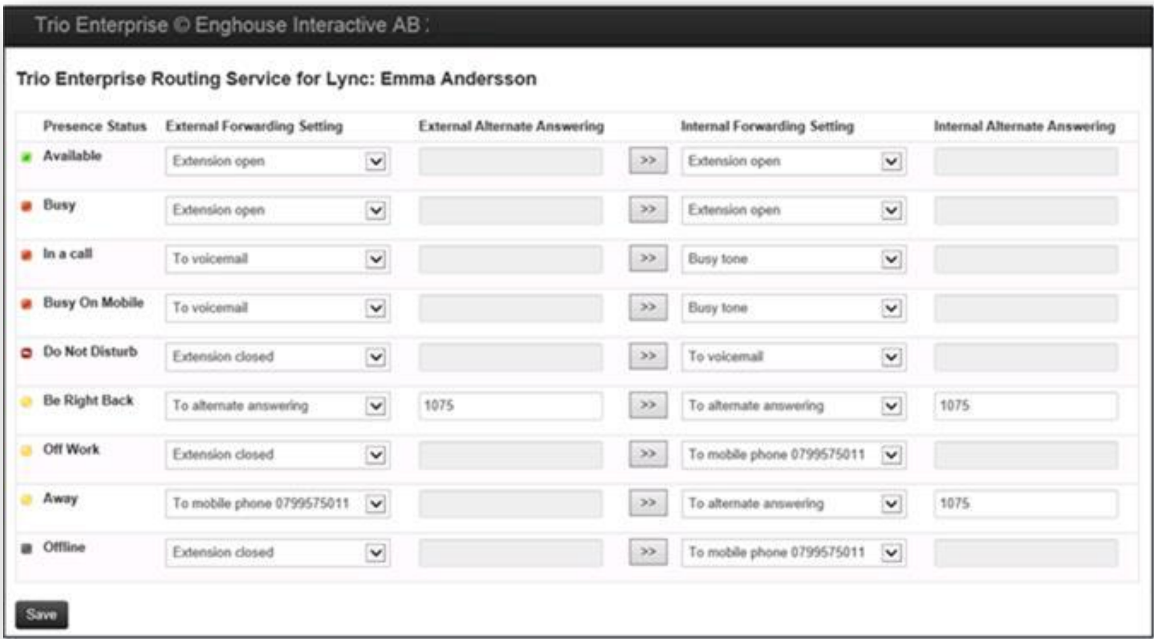
5.5.5 Enghouse Trio Routing Service for Skype for Business

The customers SFB users will have the opportunity to configure the way the inbound calls to the SFB extension will be handled depending on the SFB Presence statuses. For example the user can configure when the SFB Presence status is “In a call”, inbound calls will hear a busy tone or be transferred to another extension.

All SFB users will have to install an “addon” to the SFB user. When the addon is installed the “Tool” Enghouse Trio Routing Service will be visible for the user.



The Enghouse Trio Routing Service will open a web browser and the user needs to login with the same login as in the Trio User.


Trio Enterprise © Enghouse Interactive AB :

Trio Enterprise Routing Service for Lync: Emma Andersson

Presence Status	External Forwarding Setting	External Alternate Answering		Internal Forwarding Setting	Internal Alternate Answering
Available	Extension open		>>	Extension open	
Busy	Extension open		>>	Extension open	
In a call	To voicemail		>>	Busy tone	
Busy On Mobile	To voicemail		>>	Busy tone	
Do Not Disturb	Extension closed		>>	To voicemail	
Be Right Back	To alternate answering	1075	>>	To alternate answering	1075
Off Work	Extension closed		>>	To mobile phone 0799575011	
Away	To mobile phone 0799575011		>>	To alternate answering	1075
Offline	Extension closed		>>	To mobile phone 0799575011	

Save

The SFB presence statuses are shown on the webpage and the different choices are presented in a dropdown menu. In Enghouse Trio it is possible to have different configurations for internal and external incoming calls. If a person is defined in the Company Directory and calls from their mobile number or extension number of SIP it will be considered as an internal call.

Not every choice is applicable for all presence statuses.

Extension open: SFB ordinary call flow will be applicable.

Extension closed: The call will be directed to VoiceGuide.

To Voicemail: The call will be forwarded to the users' mailbox.

To Alternate answering: The call will be forwarded to the extension/number in the textbox Alternate Answering

Busy tone: A busy tone will be played for the caller.

To mobile phone: The call will be directed to the users' mobile phone number.

The agents/attendants have an overview of the different user's settings for how the calls are handled by the Trio Routing Service.

When the attendant has no active calls the two options are listed the same way with external first and internal option second within parenthesis next to the presence indicator.

Once a call has been answered the attendant can easily see what option (internal or external) is relevant for the type of call since it is indicated with bold text. This way the attendant can be see how the transferred call will be handled by the Trio Routing service once it has been transferred to the selected user.

In the example above we see the overview and we also see how an internal call will be handled by the Trio Routing service upon transfer.

It is important that the attendant/agent is aware of that if he/she connects a call to an extension that has configure the presence statuses the attendant/agent will connect the call according to the configuration. If an extension is "In a call" the attendant/agent will be able to queue the call, the Presence configuration will be overridden if it is configured differently.

A referral will always override the SFB Presence configuration.

On system level there are four configuration possibilities:

- Disabled – The configuration possibility does not exist
- Enabled (Read Only) – A system administrator can configure system settings that are applicable for all users. The users can see the settings but not change.
- Enabled – The users can change their own settings.
- Enabled – using profiles settings

Default configuration and different choices:

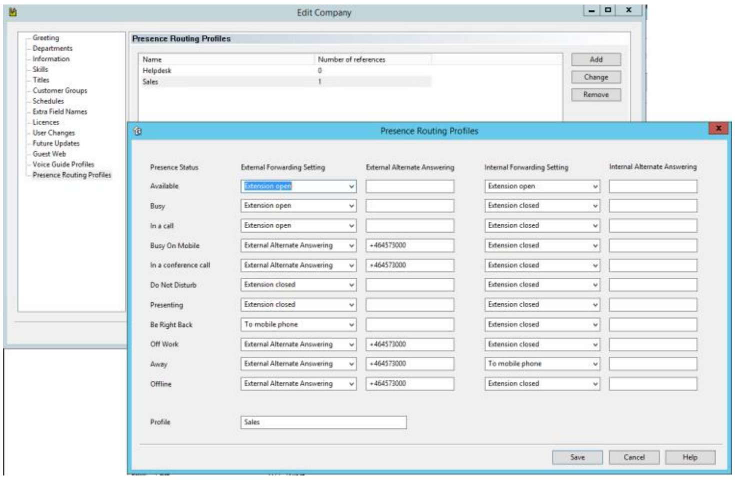
Presence Status	Default	Extension Open (SFB behavior)	Extension Closed (To VoiceGuide)	To VoiceMail	To Alternative Answering	Busy tone (Play Busy Tone)	To Mobile Phone (To the users Mobilephone number)
Available	Extension Open	Y	N	N	Y	N	Y
Busy	Extension Open	Y	Y	Y	Y	Y	Y
In a call	Extension Closed	Y	Y	Y	Y	Y	Y
Busy on Mobile	Extension Open	Y	Y	Y	Y	Y	N
Do not Distrub	Extension Open	Y	Y	Y	Y	Y	Y
Be right back	Extension Open	Y	Y	Y	Y	Y	Y
Off work	Extension Open	Y	Y	Y	Y	Y	Y
Appear Away	Extension Open	Y	Y	Y	Y	Y	Y
Offline	Extension Open	Y	Y	Y	Y	Y	Y

- The Presence status “Busy on Mobile” will be shown in the web application even if the user doesn’t have a mobile and even if the customer doesn’t have any integration for mobile line status to SFB.
- The choice “to voicemail” will be shown in the web application even if the user doesn’t have a voicemail box. If the user by accident uses this configuration the call will be sent to VoiceGuide.
- The presence status “Inactive” will use the same configuration as Available.
- Supports MS Microsoft Skype for Business 2015 or 2019

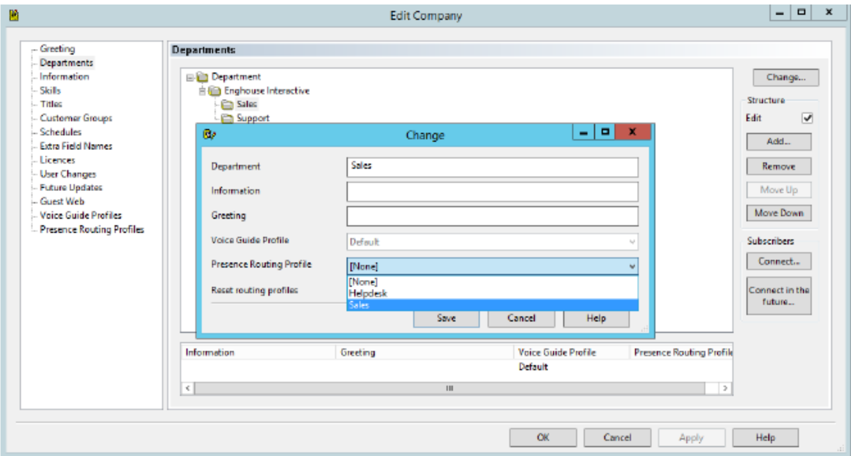
5.5.5.1 Profile settings

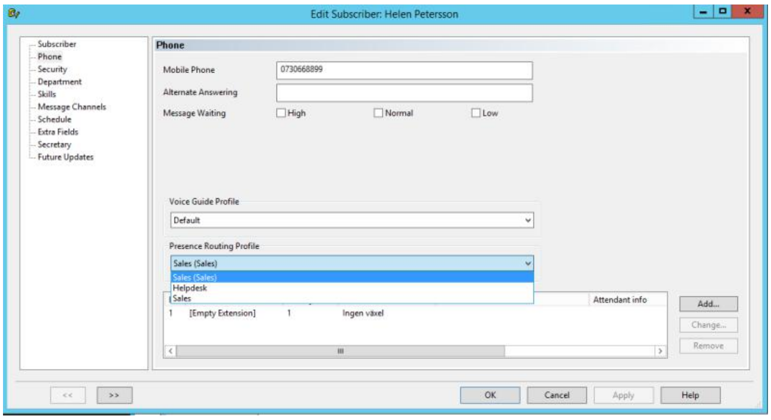
Different departments has different needs when it comes to forwarding calls. In Enghouse Trio it is possible to make profiles that can be set on departments or on individual users. The users will not be able to change the profiles but can see the configuration they have in the web application.

An administrator in CD admin will configure the profiles:



The profile will be set on a department, meaning that all the users belonging to the department will get the same profile. It is also possible to set profiles individually on the users. Maybe the CEO of the company needs his/hers own profile.





5.5.5.2 Working as a clientless agent in Skype for Business

When an Agent is using their Skype for Business client as answering device they do not need to use DTMF commands or the Agent desktop client to transfer calls.

When an agent receives a call from the contact center they can transfer the call using the Skype contact list.

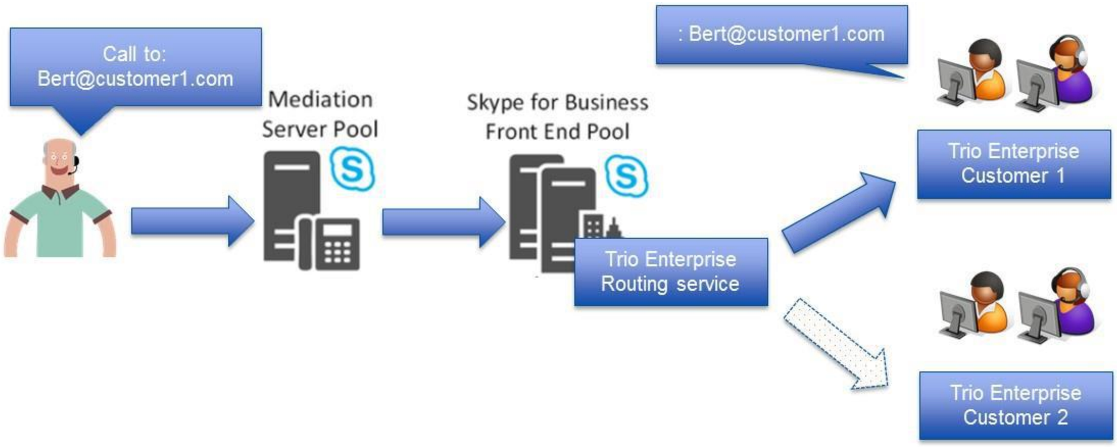
In many cases this is very appreciated for the agents that only serve as client less phone agents.

5.5.5.3 Design with shared Skype for Business

For scenarios where one central Skype for Business environment is shared by different companies and organizations Enghouse Trio has the following functionality.

Trio Forwarding Service, the central component handling calls has been adapted to work with multiple Trio Company Directories, so there is no longer any need to deploy one Front-End server or Front-End server pool per Enghouse Trio installation.

The Trio Forwarding Service component will find the Enghouse Trio that the called user belongs to and handle the call according to its rules.



This opens up for easier partner hosting of Enghouse Trio with one central Skype for Business deployment.

6 Enterprise Managers

6.1 Interaction Studio Manager License Art.No. P023120

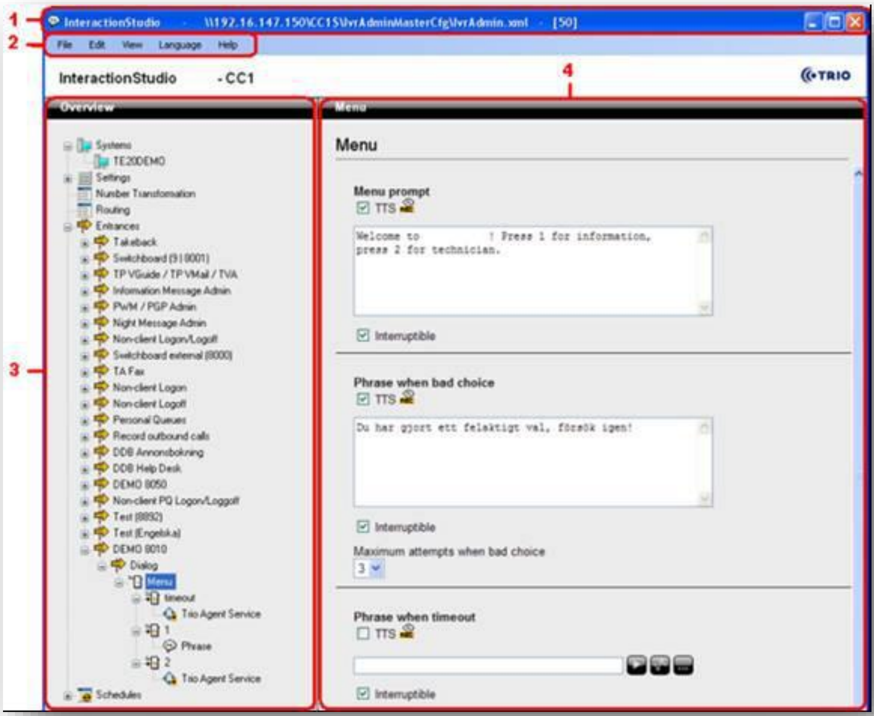
6.1.1 Customer benefits

Trio Interaction Studio provides an advanced tool for setting up call distribution and queue rules. This graphical utility enables trained technical personnel to set up how calls should be distributed. Customers can use this utility to alter phrases and service opening hours.
Trio Interaction Studio provides a flexible tool to build IVR (Interactive Voice Response) menus as well as change call routing and phrases for incoming calls.

6.1.2 How is it licensed?

Server license is included in the Enghouse Trio Server, additional clients require separate licenses.

6.1.3 How does it work?



The purpose of the application is to specify, both graphically and verbally, how incoming calls to various telephone numbers should be handled, and to store that information in a configuration file, which can be sent to connected systems. The parts of the Application Window are:

- The title bar (1) presents the name of the client and the name and version of the current configuration file. Each time an updated configuration file is sent to the connected system(s), the version number (e.g. [1]) is incremented. When changes are made to the configuration, but they have not yet been saved, the XML file is followed by an asterisk (*).
- The menu bar (2) is where you will find the various commands available.

- The left pane (3) contains a graphical representation of the objects in the system configuration.
- The right pane (4) gives a detailed presentation of the next lower level of the object selected in the left pane.

Interaction Studio can handle several systems, and works with several languages. Recording of voice phrases is done using Adobe Audition, and a USB headset.
From Enghouse Trio 6.1 the Interaction Studio will no longer need to be part of the same domain as the Enghouse Trio Server. The phrases that are played back in the IVR messages are replicated to the Administrators PC used to run Interaction Studio. From the local replica the files are played back and can be chosen for different IVR functions.
New phrases recorded by the Administrator for example using Adobe Audition can be uploaded to the Enghouse Trio server using the upload functionality.
The access to the Enghouse Trio server is this way “limited” and is made more suitable for hosted deployments.

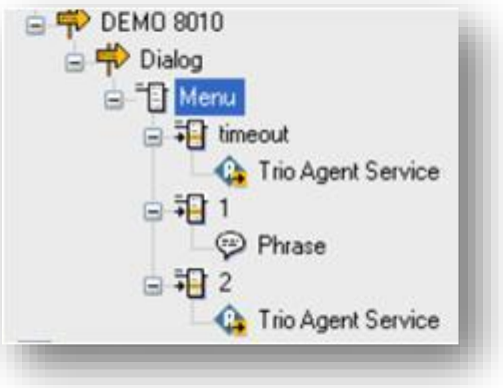
Example of a call flow
Routing tables are configured to direct calls to phone number +46 8 457 30 00 to the Entrance “Trio main entrance”
- *Welcome to Trio* (First voice prompt for the caller)

– Working days 8-17 Schedule

- *For sales department, press 1*
- *For support, press 2*
- *For attendant service, please wait*

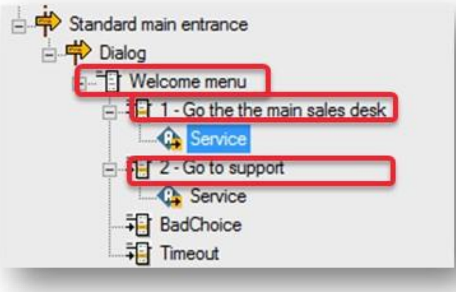
– Outside office hours Schedule

- *Our opening hours are Monday through Friday, 8 am to 5 pm*
- *For technical support, press 2*

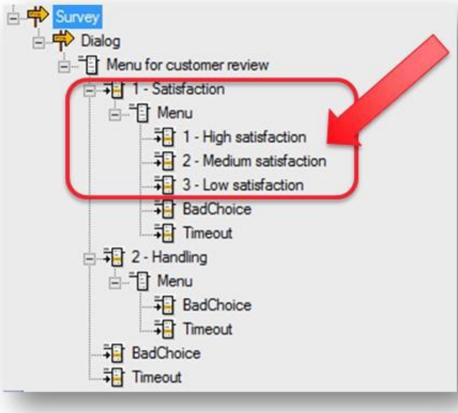


In addition to schedules, it’s possible to check if a Trio service is open before you present the choices. This is to ensure that you don’t offer choices that will end in a dead end.
If any condition should change, you can alter/remove/add voice prompts, schedules or choices etc, to manage the new situation.

Sometimes DTMF menus can be hard to understand and review once these has been defined, therefore naming is available. Naming makes it easier to get an overview of what the different DTMF choices do for call flow.



Naming the different DTMF menu options so that these are easier reflected in the Enterprise Statistics IVR-report.

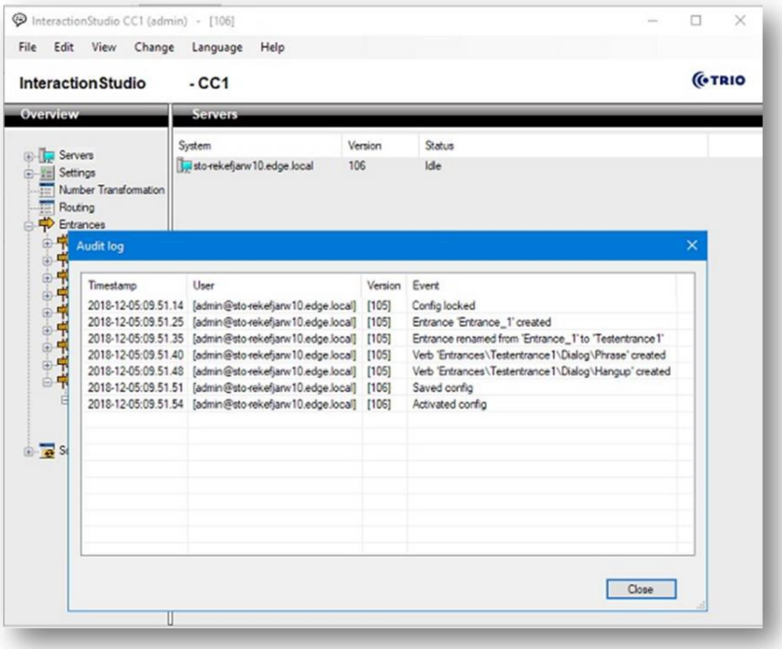


Pincodes:
It is possible to configure a pincode for when an administrator will call in to make a change in the night messages, information messages or greeting messages.

Special features:
Get and Set Call Parameter, that allows the user of Trio interaction studio to specify the data that the caller needs to put in before the call is sent to a service and to an agent. This data could be a customer telephone number or similar.
Transform Number allows the administrator to modify the caller's redirecting or called number, by adding or removing digits so the call data better suits for example a CRM connection, where the number is needed.

6.1.4 Audit log

In interaction Studio, it is possible to see the audit log. This is helpful when searching for whom did the last changes etc. It is also available to see what changes where done.



The audit log displays the date, who made the change, the version and what has been changed.

7 Customer Interaction Products

7.1 Enterprise Extensions

7.1.1 Enterprise MBN Extension Art.No. P024120

Note! The connection with Telenor Mobilt Bedriftsnett is only available in Norway.

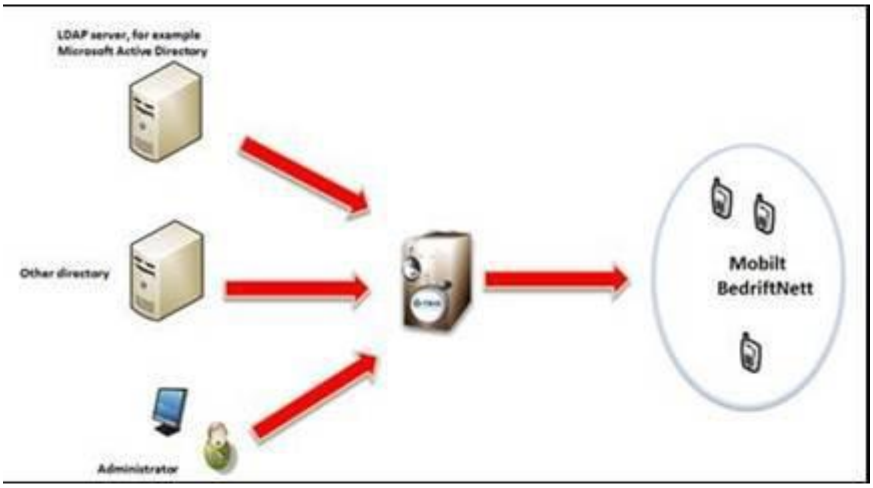
7.1.1.1 Customer Benefits

Companies often have one or several telephone systems (PBX), in addition to a number of mobile phone subscriptions. As larger proportions of the corporate workforce only use mobile phones, there has been an increased demand for efficient and seamless integration of fixed and mobile telephony.

7.1.1.2 How does it work?

7.1.1.2.1 Directory integration

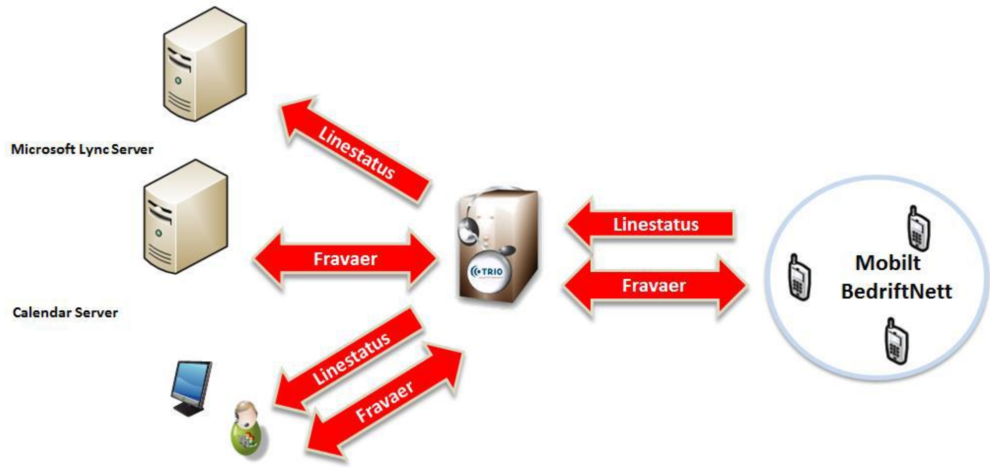
For additional user experience the Enghouse Trio Directory is synchronized with the Mobilt Bedriftsnett Directory. The Trio Company Directory administrator can this way make sure that the same information that is available in Company Directory can be used for updating Telenor specific clients, both Web as mobile.
Trio Directory can be linked with for example Microsoft Active Directory through LDAP or other external sources that can populate the Trio directory with information, and this information is then synchronized with the Mobilt Bedriftsnett directory that displays the correct information in the Telenor clients.



The fields that are updated by Trio in Mobilt Bedriftsnett Directory are Firstname, Lastname, Phone number. For users of Mobilt Bedriftsnett the phone number is administered by Telenor and Trio will update the Mobilt Bedriftsnett external contacts with the non Mobilt Bedriftsnett users, f ex. the users that are only using local PBX extensions. This way the users of Mobilt Bedriftsnett clients can use the click 2 call functionality for both types of contacts, internal and external.
Example of Telenor Mobilt Bedriftsnett directory

7.1.1.2.2 User Availability

The referrals are synchronized between Trio and Mobilt Bedriftsnett based on the Telenor Calendar API, and the user can administer their availability using the calendar or any other referral source that is supported by Trio. Using their Telenor clients, both web as mobile, the user can add, remove their referrals and these will update the users calendar as well as show the information for the Attendants.
In addition, Mobile line status is synchronized and made available to Attendants and Agents using the Enghouse Trio product. This information, when also integrated with Microsoft SFB, will show the mobile line status as part of the users availability presented in Microsoft SFB.



Enghouse Trio synchronizes the following absences by default with MobiltBedriftNett

Telenor Norwegian	Telenor English	Trio
Ingen årsak	No reason	Annet
Gått for dagen	Left for the day	Gått for dagen
Ekstern avtale	External	Tjenesteoppdrag
Møte	Meeting	Møte
Forretningsreise	Business trip	Tjenestereise
Ute til lunch	To lunch	Lunsj

Ferie	Vacation	Ferie
Ikke tilgjengelig	Not available	Deltid
Snart tilbake	Back soon	Ute
Syk	Sick	Syk
Permisjon	On leave	Permisjon

The following Line status information is available

	The mobile phone is available.
	Mobile phone is busy
	Mobile phone is switched off or no service.

7.1.1.2.3 Callhandling

The telephony replacement of Proffnet is based on SIP trunks between Enghouse Trio and Telenor Mobilt Bedriftsnett supported by the Telenor Nordic Connect service. Calls to the mobile phones that do not answer and have an active referral are redirected to the Enghouse Trio queue using the SIP trunk connecting Enghouse Trio and Mobilt Bedriftsnett.
Enghouse Trio supports “twin sim”. If the number located in the mobile phone field (Master) is free and the number located in the extra field (Slave) is busy, busy will be shown in the Attendant client. If Master is free and Slave is ”turned off”, free will be shown in the Attendant client.

The same SIP trunk can be used for direct external callers offering the attendants all the functionality available in Enghouse Trio such as advanced multichannel queue handling and recording. For more details see the product description.

7.1.1.2.4 Supported callcases

A list of the Enghouse Trio supported call cases in combination with MBN and SIP trunk can be found in the Solution Design guideline. The most important cases are for calls when the users do not answer and in the following sections the behavior of the most important call cases are described.

7.1.1.2.4.1 No Answer

When the phone do not answer Trio recommends that the phone is forwarded to a suitable number terminated by the Nordic connect SIP trunk, Trio will offer Voiceguide reading back the current status and transfer the call to operator.

If the user needs to use Telenor voicemail the call can be forwarded to “Min Svartjeneste” instead where guide will read back the users current status and give the caller different options.

7.1.1.2.4.2 Not available

Similar to no answer, see above.

7.1.1.2.4.3 Busy

When busy it is recommended that the call is forwarded to Trio destination terminated by the SIP trunk, this way the operators will be able to queue calls to the busy Mobilt bedriftsnett user.

If the user uses “Min Svartjenest” as destination the Telenor guide will read back the message to the caller again if the call is transferred to the busy extension.

7.1.1.2.4.4 Late busy/Deny

Similar to Busy, see above.

7.1.1.2.4.5 Closed with an active absence

When setting the absence using Telenor clients it is recommended that the user sets the destination to the number that is terminated by Trio using the SIP trunk or “Min Svartjeneste” that can forward the call to the attendant after reading back the message.

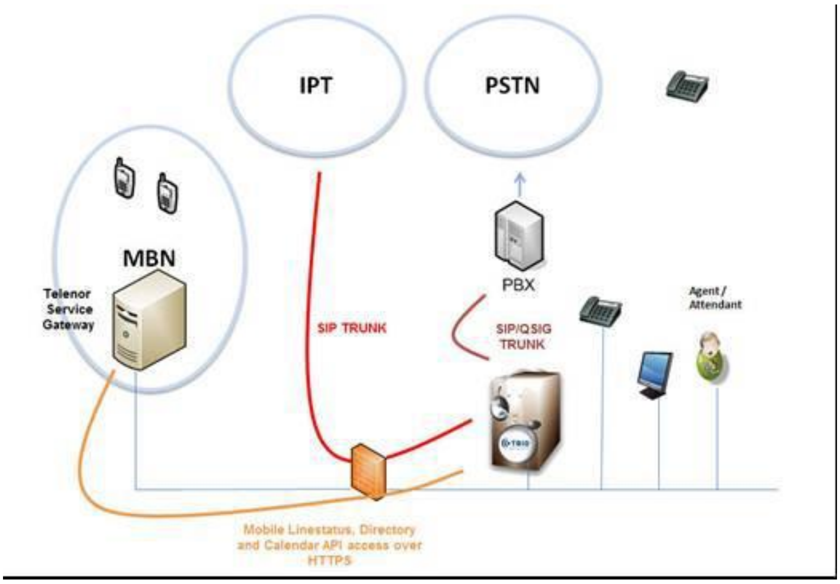
When the absence has been created from Trio, for example based on the calendar booking, the phone will be forwarded to the number defined for the Trio SIP trunk.

7.1.1.2.4.6 General

When Telenor “Min Svartjenest” is used the Trio voiceguide should not be used for the MBN users and the caller should be put through to the operator directly.
The Attendant/Agent can connect directly to MBN VoiceMail from the Attendant consol.

7.1.1.3 How is it implemented?

7.1.1.3.1 Example of a solution



The solution is based on connection to MobiltBedriftnett based on the Status Push, Calendar and Directory API, the communication between Enghouse Trio and the Telenor system is based on HTTPS protocol,
For callhandling the NordicConnect service is used to utilize the connection over SIP.
Requirements

- Enterprise Line license (Art.No. P004110)

7.2 Auto Attendant

7.2.1 Enterprise Automatic Attendant Server License Art.No. P002190

Trio Auto Attendant is a product suite of automated voice services.

7.2.1.1 Customer benefits

Trio Auto Attendant enables the caller to get automatic attendant and referral functionality, by voice commands. A substantial benefit is that the automatic attendant can serve calls 24/7. Trio Auto Attendant also enables the employees to refer their extensions by voice commands. The employees simply call Trio Auto Attendant and can configure their referral, by telling Trio Auto Attendant why they are not present and when they will be back.

7.2.1.2 Special considerations

Enterprise Voice must be installed to use Trio Auto Attendant
It is recommended that Trio Auto Attendant is installed on its own server for systems containing more than 10000 entries in the Enterprise Directory or more than 4 Auto Attendant ports

NOTE In deployments with Microsoft SFB using UCMA or Microsoft Teams using GRAPH API the **Auto Attendant cannot be deployed**, if this functionality is needed the system shall be deployed with gateway and SIP.

7.2.1.3 How is it licensed?

Trio Auto Attendant is licensed by available lines for handling calls, it is possible to queue the caller to Trio Auto Attendant but more lines gives better service.

7.2.1.4 Requirements

Enterprise Automatic Attendant Server License (P002190).
Enterprise Auto Attendant Agent (P01116X)
Nuance Speech Suite (TP1001001)

7.2.1.5 How does it work?

As customer you choose the number to be routed to Trio Auto Attendant, and configure the PBX and server to let the application answer the number chosen. It is usually a number in the direct access number plan. Trio Auto Attendant uses Nuance to enable text-to-speech, and for speech-recognition.

Functions

- Automatic attendant
- Referral of phone
- Leave voicemails

7.2.1.6 How is it implemented?

Calls are connected through Enghouse Trio Server, using RTP. Network connection between Trio Auto Attendant and Enghouse Trio Server instable network service can have negative impact one speech recognition.

7.2.2 Enterprise Auto Attendant Agent – Danish Art.No. TRIO-P011160

7.2.3 Enterprise Auto Attendant Agent – English Art.No. TRIO-P011161

7.2.4 Enterprise Auto Attendant Agent – Norwegian Art.No. TRIO-P011162

7.2.5 Enterprise Auto Attendant Agent – Swedish Art.No. TRIO-P011163

7.2.5.1 Customer benefits

Trio Auto Attendant enables the caller to get automatic attendant and referral functionality by voice commands.
For example:
The system asks:
Who do you want to call?
The caller than can say:
“Anders Andersson” or “Anders Andersson on mobile”
If there are more persons with the same name defined in the company directory the auto attendant will let the caller to choose from up to 3 persons with similar names, if there are more than 3 the caller will be connected to the Attendant service.

7.2.5.2 Other features

Call profiling:

It is possible to turn off call to certain person’s mobile phones or enabling for certain persons when these have been disabled globally as standard.

A substantial benefit is that the automatic attendant can serve calls 24/7. Trio Auto Attendant also enables the employees to refer their extension by voice commands. The employee simply calls Trio Auto Attendant and can configure his referral by telling Trio Auto Attendant why he is not present and when he’ll be back.
Organizations that share the Enghouse Trio system would like to have the possibility to specify the part of the database that is used when the caller calls the automatic attendant. Customers sharing a PBX often have different attendant groups handling internal calls for different parts of the system, similar functionality is requested from the Auto Attendant.

The possibility to assign different number for different parts of the directory, ie customer groups, speeds up the automatic attendant call handling in larger systems and minimizes the risk that the caller is connected to the wrong person. Note that it is also possible to build an IVR menu where the caller can choose both the organization as well as the language they would like the automatic attendant to work with.

So when a caller is looking for “Anders Andersson” in a specific organization this organization will normally have its own number for automatic attendant, this will lead to that only persons with this name in this particular part of the directory will be returned

If the caller cannot find the correct person and they ask for switchboard they will be connected to the correct attendant queue servicing the part of the system they called since every customer group can have different attendant queues assigned

It is possible to have one single auto attendant installation that can handle multiple languages at the same time, what language will be used is decided either by an IVR menu where the caller chooses the language or based on the number the caller dialed so for the different internal or external callers the company can have different numbers that will directly answer the call in the correct language.

Keyword searching

In Enghouse Trio there is a possibility to create “services/queues” in the Enghouse Trio database.
The feature enabled the customer the possibility to give the caller a possibility to be connected to a service based on different keywords, for example:
A customer creates a number to Trio Auto Attendant that gives the caller a possibility to state different reasons for them calling, for example:

- Support
- Error
- Sales
- Service
- etc

This way the caller does not need to state the first and last name of the person.

In the Enterprise directory database a person is created that have different alternative spellings; the different spellings are used to define the keywords that can be used.

Miscellanous

- It is possible to configure that a caller can be connected to the mobile number even if the extension has a referral.
- It is now possible to disambiguate on two of three fields, location, department and title in any order.
- It is possible to configure if the caller will have the possibility to ask for “what number/mobile number has XX” and “Who has number XX”. The possibility to say “until further notice” when setting a referral.
- Weekend handling, possibility to configure that the returning time for “left for the day” on Friday will be on Monday.
- Possibility to say “last number” and Auto Attendant will call the last number you have asked for.
- Different numbers for “operator” and “referral service”.

7.2.5.3 Special considerations

Languages supported are Norwegian, Swedish, Danish or English; every language requires its own license
NOTE In deployments with Microsoft SFB using UCMA interface the Auto Attendant cannot be deployed, if this functionality is needed the system shall be deployed with gateways and SIP
The Auto Attendant is based on two main features, text to speech and automatic speech recognition, running multiple languages in the same system requires some special planning.
With text to speech one must note that the base Auto Attendant language is also mainly adapted to handle the names in that language. Swedish names are pronounced by an English text to speech engine in an English Auto Attendant installation and vice versa. The text to speech engine shall be considered as a native speaker that is fluent in a specific language.
In systems with a lot of different type of names it is recommended that the customer considers recording the names in a professional studio, this is especially useful with multiple language instances since the recorded name will be played back regardless of what language instance is used.
The speech recognition part is also adapted for a certain language; the hit rate for Swedish names will be a lot better on a Swedish instance of the Auto Attendant than on the English one. The hit rate is also dependant on the size of the system, a large number of names will make it harder for English speech recognition to choose the correct Swedish name than in a smaller system. In these scenarios it might be useful to have instances of Auto Attendant in multiple languages.
To improve recognition in larger systems the customers can use the phonetic fields that will make certain names more adapted for English or Norwegian callers.

Numbers need special attention as well, for example organization name “Business Unit 33” will be read back differently by a Swedish, Norwegian or English instance, the numbers are localized to the called instance language but the name will be read back with the best effort.

7.2.5.4 How is it licensed?

Auto Attendant is licensed by available lines for handling calls.

7.2.5.5 Requirements

- Enterprise Automatic Attendant Server License (P002190).
- Enterprise Auto Attendant Agent (P01116X)
- Nuance Speech Suite (TP1001002)

7.2.5.6 How is it implemented?

Trio Auto Attendant communicates with Enghouse Trio Directory and Line Interfaces through a web service and SIP/RDP (UDP).
Trio Auto Attendant works as an Enterprise Agent Service; different welcome messages are available per number accessing the service
It is also possible though not recommended, to queue a caller for a while awaiting an Auto Attendant resource to become available, exactly the same way as for services staffed with personnel.

7.2.6 Enterprise Auto Attendant Agent Additional language – Danish Art.No. TRIO-P011165

7.2.7 Enterprise Auto Attendant Agent Additional language – English Art.No. TRIO-P011166

7.2.8 Enterprise Auto Attendant Agent Additional language – Norwegian Art.No. TRIO-P011167

7.2.9 Enterprise Auto Attendant Agent Additional language – Swedish Art.No. TRIO-P011168

7.2.9.1 Customer benefits

This item is the additional language for the Auto Attendant feature, for example a customer that buys the Swedish base can add the Auto Attendant Agent Additional Language - English as additional language.

7.2.9.2 Requirements

- A base such as:
  - Enterprise Auto Attendant Agent – Danish Art.No. TRIO-P011160
  - Enterprise Auto Attendant Agent – English Art.No. TRIO-P011161
  - Enterprise Auto Attendant Agent – Norwegian Art.No. TRIO-P011162
  - Enterprise Auto Attendant Agent – Swedish Art.No. TRIO-P011163
- And one Nuance Speech Suite Additional Language (Art.No. TP1001002) per additional language

7.2.9.3 How is it licensed?

The number of Auto Attendant Agent additional language shall always be equal to number of Auto Attendant Agent Licenses.
If you have the need for 2 languages one Enterprise Auto Attendant Agent Additional language licens is needed (min 2), when you need the 3rd language you purchase one Enterprise Auto Attendant Agent Additional language more.

Similar is needed for Nuance Speech Suite Additional Language (Art.No. TP1001002)

7.3 Enterprise Additional Modules

7.3.1 Enterprise Connection per external system (CRM) Art.No. P033910

7.3.1.1 Customer benefits

This license is required when Enghouse Trio is connected to a CRM system. Connection to CRM systems is used for "popping" the information from the CRM system, based on the callers A-number or registered customer number. One license is needed for each CRM system that you connect to the system. Work from Enghouse Interactive PS department will be necessary to complete the CRM Connection. Please ask your sales representative for a customization document.

7.3.1.2 How does it work?

Integration with Enghouse Trio can usually be divided into three entities:

- Enghouse Trio supplies customer data to the CRMS
    - E.g. sends survey answers
- Enghouse Trio retrieves customer data from the CRMS
    - E.g. prioritises VIP customers
    - E.g. routes customers to the correct agents
    - E.g. informs the agent of certain data about the caller
- Enghouse Trio automatically activates windows, and performs macro operations on the client workstation
    - E.g. activating the CRMS and automatically entering customer identification data, and then pulling up customer data

The entities are enabled by caller identification, either by the callers originating phone number, or an identification process in which the caller enters an Instant Voice Response menu. Here he/she is prompted to make certain choices, or enter an identification number, e.g. customer number or social security number. Some of the technologies that we have utilised when integrating with a customer's CRMS are listed below

- TCP/IP – Web services
- ODBC – Open Database Connectivity
- DDE Client – Dynamic Data Exchange Client
- TCP/IP – Socket transactions
- Named pipes
- COM – Component Object Model
- VBA – Visual Basic for Applications
- WSH – Windows Shell scripting
- WIN32

7.4 Enterprise Text To Speech Art.No. P034110

7.4.1 Customer benefits

The Text To Speech (TTS) is a text to sound generator service. TTS is used for automatically updated information (such as names, phone numbers, prices, weather forecasts, service messages etc.). It can also be used for standard phrases, to avoid manual recording of phrases each time a new message is needed.
TTS can be used with:

- Customized IVR scripts (self-service applications, etc)
- Interaction Studio
- Voice Guide (Enterprise Voice) for reading names instead of phone numbers.

The standard voices used by Trio Text to Speech are:
Swedish: Elin, Emma or Erik, Elin is used by default
Norway: Kari,
Danish: Mette
English: Graham, Lucy

It is possible to listen to the voices at the web site http://www.acapela-group.com/virtual-speaker-6-speech-solutions.html

7.4.2 Special considerations

The functionality is similar to the Auto Attendant, where the names are read back and are based on the language instance of the Text To Speech.
With text to speech one must note that the base Text To Speech language is also mainly adapted to handle the names in that language. Swedish names are pronounced by an English text to speech engine in an English Voiceguide and vice versa (language is defined by the Voiceguide Profile of the person in the database). Certain names are pronounced according to the best practice common for certain languages and might be considered as incorrect by some individuals.
The text to speech engine shall be considered as a native speaker that is fluent in a specific language, this means that names uncommon to a specific language will probably not be pronounced correctly.
For names that are hard to be covered by Text To Speech it is recommended that the persons Voiceguide profile is configured so it does not use Text to Speech and the person records their name personally.

NOTE In deployments with Microsoft SFB using UCMA or Microsoft Teams based on GRAPH API the **Enterprise Text To Speech can not be deployed**, if this functionality is needed the system shall be deployed with gateways and SIP

7.4.3 How is it licensed?

Licenses are based on the number of Enterprise Line license/Call queuing License.
The licenses are bought one by one following the Line licenses. When the licens level reach every hundred (100, 200, 300 etc) a new Acapela license is required.
First Additional language requires:

- Art.No. P035110 Enterprise Text to speech, 1st Additional Language

Second additional language is sold this way:

- Art.No. P036110 Enterprise Text to speech, 2nd Additional Language

7.4.4 Requirements

- Enterprise Line License/Call Queuing License (Art.No. TRIO-P004110)
- To be able to generate the TTS licenses the Trio Line interface server MAC-address is needed.

7.4.5 Enterprise Text to speech, 1st Additional Language Art.No. P035110

7.4.5.1 Customer benefits

The first additional language for TTS, in case the customer wishes to have multiple languages, see Enterprise Text To Speech Art.No. P034110 for more information.

7.4.5.2 How is it licensed?

Licenses are based on the number of Enterprise Line license/Call Queuing License.
The licenses are bought one by one following the Line licenses. When the licens level reach every hundred (100, 200, 300 etc) a new Acapela license is required.

7.4.5.3 Requirements

- Enterprise Text To Speech (Art.No. P034110)
- To be able to generate the TTS licenses the Trio Line interface server MAC-address is needed.

7.4.6 Enterprise Text to speech, 2 nd Additional Language Art.No. P036110

7.4.6.1 Customer benefits

The second additional language for TTS, in case the customer wishes to have multiple languages, see Enterprise Text To Speech Art.No. P034110 for more information.

7.4.6.2 How is it licensed?

Licenses are based on the number of Enterprise Line license(Call Queuing License.
The licenses are bought one by one following the Line licenses. When the licens level reach every hundred (100, 200, 300 etc) a new Acapela license is required.

7.4.6.3 Requirements

- Enterprise Text To Speech (Art.No. P034110)
- Enterprise Text to speech, [1]st Additional Language (Art.No. P035110)
- To be able to generate the TTS licenses the Trio Line interface server MAC-address is needed.

8 Phone options for Enterprise Agent Client and Enterprise Attendant

This section explains the different functionality, depending on the phone options in Enterprise Agent Client and in the Enterprise Attendant client. The free seating offers new, efficient ways to work. You can work, independently of the phone set available at the location where you are working. However, there are differences in the functionality depending on the phone you are using. This section will explain the functionality in each option.
The two clients can connect to the system using standard phone, and standard phone with auto answer. The Agent or Attendant can also choose to work in “Open Line” mode. Standard phone with auto answer is based on the Trio TVP process, providing the client with TAPI like functionality for the phone. This requires the phone to be set up with auto answer functionality. Here is a description of the different phone settings in Trio client. For Enterprise Agent Client you supply your phone type and number in the logon window.

8.1 Available phone options

8.1.1 Standard phone

In this solution, the client uses a separate phone, and has to answer the call on that phone. There is no requirement for the phone; it could be a system phone connected to the PBX, a mobile phone or a home phone.
The call is distributed to the client. The call information is displayed in the client. The server connects the call to the phone number configured. The phone starts ringing, and the client answers. Your phone status will be set to busy in the agent’s window (agent’s window is a real-time monitor of all agents and attendants in the Trio system; this is a part of the Enterprise Agent Client installation), when answering calls to the service or to your personal queue. If you have the Personal Welcome Message option, this will be played for the caller, as well as for you. If you have the recording option, the inbound calls to the service call will be recorded (se Enterprise Voice Recorder line license).

- Requires answering on the phone set.
- Use any phone
- Enter the number you are using in the configuration utility, or when logging on if you are using the Enterprise Agent Client.
- Your phone status will be shown in the Agents window for attendant’s calls and calls to the personal queue
- Supports personal queue
- Connect call from the client, using the keyboard or mouse
- Works with Personal Welcome Message (this option requires an additional license)
- Supports recording (this option requires an additional license)

Answering calls
Inbound calls are distributed to the clients. Depending on the configuration, the call is either automatically sent to the phone se– - or the client must first select the call in the application, using short-cut keys on the keyboard, or clicking on the answer button in the application. In both cases, the call is put through to the phone set, and the call must be answered on the phone.
A call should not be connected directly to the extension, if the phone is used for direct calls. The phone will report busy back the Trio server if a direct call is in progress. The server will then distribute the call to the next available client.
If the call is not answered on the phone, the server will distribute the call to the next available client.

Outbound dialling
Dialling from the address book, the server sets up the call to the client’s phone extension. When the client answers the call, the server will place the outbound call and connect the two parties.
When dialling manually, using the phone, you will need to pause the client.

8.1.2 Standard Phone with Auto Answer

In this solution, the client is using a phone connected to the local PBX. The phone supports and is configured with auto answer. Calls to this phone are automatically answered in the headset, without having to press any buttons on the phone or lift the receiver.
Phone calls are answered in the client or pushed directly to the phone, depending on the client configuration, (push/pull for the Attendant and ready/paused for the Agent. The client does not need to answer or hang up the call on the phone set. This solution requires a phone set with auto answer functionality, check with the PBX technician.)

Auto Answer on the PBX
Auto Answer is a function in the PBX. The function varies between the PBX brands, you should check with your PBX supplier whether this function is supported. Note also, that the functionality might vary between phones or headsets. You should test your system, to make sure that the function is available and works as intended.
Auto Answer works on the PBX phones, regardless of whether Enghouse Trio is installed or connected. Note that most phones have a “new call” notification tone before connecting the call, to make the client aware that a new call has been put through. The audio level of this notification tone varies from phone set to phone set. Make sure that your phone system does not have a notification tone that is disruptive or annoying for your agents or attendants, before you set up the system with auto answer.
The call is distributed to the clients. The call information is displayed in the client. The server connects the call to the phone number specified. The call is automatically put through to the client. Your phone status will be set to busy in the Agents window when answering calls to the client service or to your personal queue, (agents windows is a real-time monitor of all agents and attendants in the Trio system; this is a part of the Enterprise Agent Client installation). If you have the Personal Welcome Message option, this will be played for the caller as well as on to you. If you have the recording option, the inbound calls to the service call will be recorded (se Enterprise Voice Recorder line license).

- Requires a phone that can be configured with auto answer
- Calls are answered in the client only
- Phone number is configured in the client configuration utility
- Your phone status will be shown in the client window for attendant’s calls and calls to the personal queue
- Supports personal queue
- Connect call from the client, using the keyboard or mouse
- Works with Personal Welcome Message (this option requires an additional license)
- Supports recording (this option requires an additional license)

Answering calls
When a call is distributed to the client from the service or the personal queue, the auto answer configured will automatically answer the call. At the same time, the client window will display information about the call and sound the ringing tone, (in this case the ring tone is on the computer, and requires the ability to play sound on the PC). The caller is still waiting for the agent to answer (in queue or listening to ringing tone). The agent answers the call, either by pressing the answer key on the keyboard, or by clicking on the answer button in the client window.
If the call is not answered on the phone, the server will distribute the call to the next available client and the application will be set in pause mode. This behaviour can be configured.

Outbound dialling
When dialling from the client, the server sets up the call to the client's phone extension. When the phone answers the call in auto answer mode, the server will place the outbound call and connect the two parties. When dialling manually, using the phone, you will need to pause the client.

Private calls to Attendant and Agent, when using auto-answering phone
Attendant/Agent using Enterprise Agent client with auto answering phone set, must use personal queue and address book for private calls. Private inbound calls are handled by the personal queue. To use personal queue you have to configure PABX, to route calls to private extension to Enghouse Trio system, and configure personal queue within Enterprise system.
When dialling manually, using a standard phone, you will need to pause the client and call manually from your phone.

8.1.3 Open Line

In this solution the call from the Trio server to the agent/attendant phone through the PBX stays open for as long as the function is "on".

Both standard phone and standard phone with autoanswer can use the functionality open line. Openline means that a call will be set up between the Server and the agent phone through the PBX and it will be active until the agent decides to hang up. The agent will start the open line by clicking the open line icon:

The System will use open line, the call to the agent/attendant phone is active:

The call is distributed to the clients. The call information is displayed in the client. The server connects the call to the already existing open line call to agent/attendant. The agent/attendant phone status will be set to busy in the Agents window when answering calls to the client service or to your personal queue, (agents windows is a real-time monitor of all agents and attendants in the Trio system; this is a part of the Enterprise Agent Client installation). If you have the Personal Welcome Message option, this will be played for the caller as well as on to you. If you have the recording option, the inbound calls to the service call will be recorded (se Enterprise Voice Recorder line license).

- Calls are answered in the client only when open line is active
- Phone number is configured in the client configuration utility
- Agent/Attendant phone status will be shown in the client window for attendant's calls and calls to the personal queue
- Supports personal queue
- Connect call from the client, using the keyboard or mouse
- Works with Personal Welcome Message (this option requires an additional license)
- Supports recording (this option requires an additional license)

Answering calls
When a call is distributed to the client from the a service or the personal queue a sound from the PC will be played (requires the ability to play sound on the PC). The agent/attendant client will automatically answer the call when the user hits "answer". At the same time, the client window will display information about the call. If the call is not answered, the server will distribute the call to the next available client and the application will be set in pause mode. This behaviour can be configured.

Outbound dialling
When dialling from the client, the server already has a call to the client's phone and a call will be made to the dialled extension. When th246ialleded extension answers the audio between the two parts are connected. If the agent/attendant need to call from the actually phone the open line function has to be deactivated.

Private calls to Attendant and Agent
Attendant/Agent using Enterprise Agent client using open line, must use personal queue and address book for private calls. Private inbound calls are handled by the personal queue. To use personal queue you have to configure PABX, to route calls to private extension to Enghouse Trio system, and configure personal queue within Enterprise system.
If the agent/attendant need to call from the actually phone the open line function has to be deactivated.
If the Attendant/Agent is using SFB as Phone type, the Open Line icon will not be visible.

8.1.4 Microsoft Skype for Business client

In this solution the Agent or Enterprise Attendant uses the soft phone functionality of Microsoft SFB Client
A requirement is that the user is enabled for Enterprise Voice and that they have an extension defined for their Microsoft SFB Client

Answering calls
The call handling is similar to the Standard Phone, the difference is that the user does not need to answer calls in the Microsoft SFB Client; instead they can use the key on the keyboard that is used for answering or press the answer button in the application.
In Trio Agent Web the user needs to answer the calls in the Skype for Business client.

Outbound dialling
Dialling from the address book, the server sets up the call to the client's phone extension. When the client answers the call, the server will place the outbound call and connect the two parties.
When dialling manually, using the phone, you will need to pause the client

8.1.5 Microsoft Teams

See Standard Phone with Open Line as option

8.1.6 Built-in phone in Trio Agent Web

See Trio Agent Web

9 Enghouse Trio and Large systems

Enghouse Trio includes enhancements for systems up to 2000 simultaneously agents. Development in the platform (a new process called XP) and new functionality for agents/attendants and administrators are implemented to simplify and improve the work.

It is possible to set up skill profiles in the system. This means that instead of giving every agent their skills one by one, a skill profile can be configured and added to the agent. If any skill in the profile needs to be changed it will change on all agents belonging to that profile.

10 Enghouse Trio in Multiple Timezones

Support for distributed systems has been Trios Enterprise strong side for many years. Enghouse Trio has support for handling of referrals in multiple time zones .

10.1 Functionality available

10.1.1 Operators/Attendants and Voiceguide

The operators will be able to view and administer referrals for users in the user's correct time zone and the Trio Voiceguide will inform the caller about the end users return time of the person they tried to reach.
It is possible to setup queues that shall service the different timezones, this way it will be possible for the attendants to see the different persons return time adapted to the callers timezone.
The operator can switch to view the return times between operators time, the callers time and the end users time.
If a user calls his VoiceMail the server timezone will be read for when the message was recorded.

10.1.2 Agents

Agents Casehistory and list of last contacts has been adapted so it converts the timestamps and presents these in the agents local time.

10.1.3 Queues and Servcies

With additional configuration the contact center administrator can adapt the schedules for multi TZ deployments, specify if the schedule is for Sweden or for Finland

10.1.4 Statistics and recording

Statistics and recordings are presented and stored in the main Enghouse Trio Server time and do not cover the time differences.

10.1.5 Outbound Call Server

Outbound Call Server (Telemarketing) administration is handled in the server time, to start the campaigns in different time zones the administrator must consider the differences in time.

11 Microsoft Teams and Skype for Business Comparison

11.1 Background

The goal of this section is to create an overview of differences between a Trio integrated with Skype for Business and a Trio Enterprise integrated with Microsoft Teams

11.2 Presence

Description	Microsoft Skype for Business	Microsoft Teams
Display Presence in Trio User	yes	yes
Display Presence in Trio Enterprise Agent	yes	yes
Display Presence in Trio Web Agent	yes	yes

11.3 Client features

Description	Microsoft Skype for Business	Microsoft Teams
Click 2 call fom Trio User	yes	yes
Initiate chat from Trio User	yes	yes
Initiate chat from Trio Web Agent	yes	yes
Add Trio User to client	no	yes
Add Trio Web Agent to client	no	yes

11.4 Linestatus

Description	Microsoft Skype for Business	Microsoft Teams
display busy in call in Trio User, Trio Enterprise Agent and Trio Web Agent	yes	yes
Update presence based on mobile linjestatus	yes	yes
Update presence based on PBX linjestatus	no	no

11.5 Referral

Description	Microsoft Skype for Business	Microsoft Teams
Update presence based on referral	yes	no
Be able to create referral based on presence (busy with note)	yes	no
remove referral by setting presence status available	yes	no

11.6 Working as agent

Description	Microsoft Skype for Business	Microsoft Teams
Modify presence status when logging on as agent in Trio Enterprise	yes	no
forward internal calls to my number when logged on as agent	yes	no
forward external calls to my number when logged on as agent	yes	no

11.7 Call Recording

Description	Microsoft Skype for Business	Microsoft Teams
Trio Enterprise built recording	yes	yes (SIP)
QMS recording	yes	yes

11.8 Call routing

Description	Microsoft Skype for Business	Microsoft Teams
Be able to redirect calls differently based on presence for external callers	yes	no
Be able to redirect calls differently based on presence for internal callers	yes	no

12 Comparison of Teams with Direct Routing(SIP) and using Native GRAPH api

The goal of this section is to create an overview of differences between a Trio integrated with Teams using SIP(SBC) and Trio based on Teams Native GRAPH API based deployment

12.1 Summary

12.1.1 Other functions that are not listed

Here we list limitations identified, functions like callback, playback of welcome phrases, surveys and other non speech recognition based functions are available.

The important thing is that the Trio system in the Teams GRAPH API scenario does not have the media or ability to modify the different legs and is limited to what the GRAPH API is offering.

12.1.2 Hybrid solutions?

A hybrid of a cloud PBX (Telepo etc) or an hosted PBX shall not be combined with GRAPH, a SIP approach shall be chosen that gives similar functionality in all parts of the solution.

12.1.3 Benefits of Teams with GRAPH?

There are many benefits with Teams GRAPH based solution, no SBC are needed, customer may obtain telephony by Microsoft Calling plans, Operator Connect without the need to invest in SBCs or similar.

As found below using GRAPH calls can be transferred to Teams users that do not have a Teams phonesystem license.

Calls are handled within a "BOT" conference created upon answer or when making outbound calls

12.1.4 Supported Trio Agent clients

Description	Teams SIP	Teams GRAPH	Comments
Trio Agent Web	yes	yes	Trio Agent Web client is adapted for Limitations of Native Teams
Trio Agent Windows AP	yes	no	Windows Agent will not be adapted to limitations of Native Teams integration

Trio CC App	yes	no	Use Agent Web on mobile instead, the CC app is not meant for Native Teams
Trio Phone Agent (non UI agent)	yes	yes*	* can not use DTMF for transfer/recording of calls

12.1.5 Callhandling

Description	Teams SIP	Teams GRAPH	Comments
in IVR Answer call, play prerecorded messages like queue music, place in queue etc while waiting foe what shall be done with the call	yes	yes	No Text to Speech
Make it possible ´for the caller to speak to an agent (answering as agent)	yes	Yes*	*With Teams Connector agents need to pick up handset manually
Make call from Agent like for example for Callback/Telemarketing or spontaneous call to any number	yes	yes	
Make call from Agent like for example for Callback/Telemarketing or spontaneous call to a UPN supported by Teams (like Teams user without a phone number)	no	yes	
Add a any destination to the call handled by an Agent	yes	yes	
Mute agent line	yes	yes*	Hold only with Teams Graph
Consultation call (calling a 3rd party like the manager to consult with caller online)	yes	yes	
Announced transfer (calling a 3rd party to announce the call before transfer)	yes	yes	Using GRAPH API hold functionality
Blind Transfer (Sending the call to the 3rd party and dropping the agent before answer)	yes	yes	
Supervisor listen in and whisper	yes	no	

12.1.6 Agent phonetypes

Description	Teams SIP	Teams GRAPH	Comments
Teams client as answering device	yes	Yes*	*Open line is only available for SIP Agent Call recording is only available for Teams
Trio Agent Web built-in phone (WebRTC)	yes	no	WebRTC not possible when handling calls using GRAPH
Trio Agent using open line	yes	no	The GRAPH based solution has no ability to keep a conference, therefore Open line to agents is not supported
Mobile or any PSTN phone	yes	yes*	Agent can use any device for answering calls, note that Open Line is not available Calls can not be recorded * There is a delay when setting up speech for non Team based agents

12.1.7 Speech Recognition and Text to Speech

Description	Teams SIP	Teams GRAPH	Comments
Automatic Attendant (ASR) / Voice Enabled IVR	yes	no*	* Autoattendant can be made available over SIP/PSTN
Test to Speech (TTS)	yes	no*	

12.1.8 Call Recording

Description	Teams SIP	Teams Graph	
Trio built-in recording	yes	no	No media paths available so speech can not be recorded by the Trio system
QMS recording	yes	yes (Teams client only*)	* Agents on mobile or PBX phones can not be recorded.

Phrase recording (information and queue messages)	yes	yes*	* max 2 minutes can be recorded, GRAPH api does not support longer recordings

12.1.9 Voicemail options

Description	Teams SIP	Teams Graph	
Trio Voicemail support	yes	no	
Support for Teams Voicemail (transfer from Voiceguide)	no	no	

12.1.10 DTMF functionality in different situations

Description	Teams SIP	Teams Graph	
Support for DTMF in IVR	yes	yes	
Support for DTMF from caller in call with Agent	yes	yes *	* as long as Agent has not done a consultation of the call before.
Support for DTMF in outbound calls from Agent	yes	yes	* as long as Agent has not done a consultation of the call before.

12.1.11 Number handling in Contact Center calls

Description	Teams SIP	Teams Graph	
Receive caller ID (calling number)	yes	yes	
Receive redirecting ID (redirecting number) (similar to history/diversion in SIP)	yes	yes	
Receive redirecting cause(redirecting number) (similar to user busy or no answer)	yes	yes*	* There is no definition why the call was forwarded.
Receive called number (final destination) (similar to "to" in SIP)	yes	yes	

12.1.12 Transferring calls

Description	Teams SIP	Teams Graph	Comments
Call a PSTN or Mobile number	yes	yes	
Call a sip address (a Teams user without a phone number (no Phonesystem license))	no	yes	Using GRAPH the destination does not need to have a phone number, meaning all Teams users can be reached
Transfer a call to a PSTN or Mobile number	yes	yes	
Transfer a call to a sip address (a Teams user without a phone number (no Phonesystem license))	no	yes	Using GRAPH the destination does not need to have a phone number, meaning all Teams users can be reached

12.1.13 Detailed handling of outbound calls

Description	Teams SIP	Teams Graph	Comments
Define redirecting number (modify calldata)	yes	no	No ability to define redirecting number for outbound calls from CC/IVR
Set PAI header or diversion/history (basically billing information for outbound calls)	yes	no	No ability to define SIP headers etc for outbound calls from CC/IVR
Define outgoing caller ID (from in SIP) Ex: re-use caller ID from incoming calls in outgoing calls	yes	no	Important for outbound dialer and operator transfer,a dialer could dial out as a certain application.
Support for Early Media in outbound calls	yes	no	No support for early media

12.1.14 Gathering Teams Presence

Description	Teams SIP	Teams GRAPH

Display Presence in Trio User	yes	yes
Display Presence in Trio Enterprise Agent	yes	yes
Display Presence in Trio Web Agent	yes	yes

12.1.15 Handling Linestatus with Teams - Trio Presence connector

Description	Teams SIP	Teams GRAPH
display busy in call in Trio User, Trio Enterprise Agent and Trio Web Agent	yes	yes
Update presence based on mobile linjestatus from operators such as Telenor, Telia, Tele 2 or 3	yes	yes
Update presence based on PBX linjestatus	no	no

12.1.16 General Teams related Trio client features

Description	Teams SIP	Teams GRAPH	
Click 2 call from Trio User	yes	yes	Uses call to that initiates a Teams call , a non Teams Connector function
Initiate chat from Trio User	yes	yes	Uses SIP that initiates a Teams chat, a non Teams Connector function
Initiate chat from Trio Web Agent	yes	yes	Uses SIP that initiates a Teams chat, a non Teams Connector function
Add Trio User as a Teams APP	yes	yes	From 9.1 Trio user can be added as a Teams App
Add Trio Agent Web as a Teams APP	yes	yes	From 9.1 Trio agent Web can be added as a Teams App

12.1.17 Trio Referral handling

Description	Teams SIP	Teams GRAPH	

Update presence based on referral	yes	yes	Trio Presence connector will be able to update presence to busy when there is an active referral
Be able to create referral based on presence (busy with note)	no	no	Trio Presence connector will not be able to create a referral in Team since the user can not set the "note(text)" as in Skype
Remove referral by setting presence status available	no	no	Will be investigated once GRAPH API opens up for additional features

12.1.18 Trios Working as agent functionality

Description	Teams SIP	Teams Graph	
Modify presence status (set as busy) when logging on as agent in Trio	yes	yes	Trio Presence connector will be able to update presence to busy when there is an active referral
forward internal calls to my number when logged on as agent in Trio	no	no	There is no possibility to forward calls from Trio in Teams
forward external calls to my number when logged on as agent in Trio	no	no	There is no possibility to forward calls from Trio in Teams

12.1.19 Trios Call routing based on presence

Description	Teams SIP	Teams Graph	
Be able to redirect calls differently based on presence for external callers	no	no	There is no possibility to forward calls from Trio in Teams
Be able to redirect calls differently based on presence for internal callers	no	no	There is no possibility to forward calls from Trio in Teams
Be able to forward calls to Trio when user has an active referral	no	no	There is no possibility to forward calls from Trio in Teams

13 Security features

The Enghouse Trio clients such as Trio Referral (Assistant for Smart Phone), Trio User, Enterprise Statistics, Mobile Agent Client and the Enterprise Attendant/Agent Client goes through an authentication process to get a token that is valid in the system. Each client communicates with a central security service when the users tries to logon. If the clients succeeds an Authentication Token will be given. That Token will be sent and used in the entire system for all operations that need to identify the user.

To trace the changes made by the different administrators, especially in the Contact Center, logging for administrative operations has been added. This way the customer can trace when changes to different functions has been made and by whom.

13.1 Account Security

13.1.1 Logging and auditing of logon attempts

All login attempts by end users of Assistant for Web, Trio Assistant for Mobile phones, Mobile Agent Client, Phone Agent Client-APP and the Enterprise Attendant/Agent Client are logged. This way repeating attempts to log on from a certain user can be observed.

13.1.2 Password complexity requierements

Passwords complexity can be defined. This means that customers can require their users to use passwords of specific length, mix digits, letters with special characters and mix upper and lower case.

13.1.3 Locking out users due to bad logon attempts

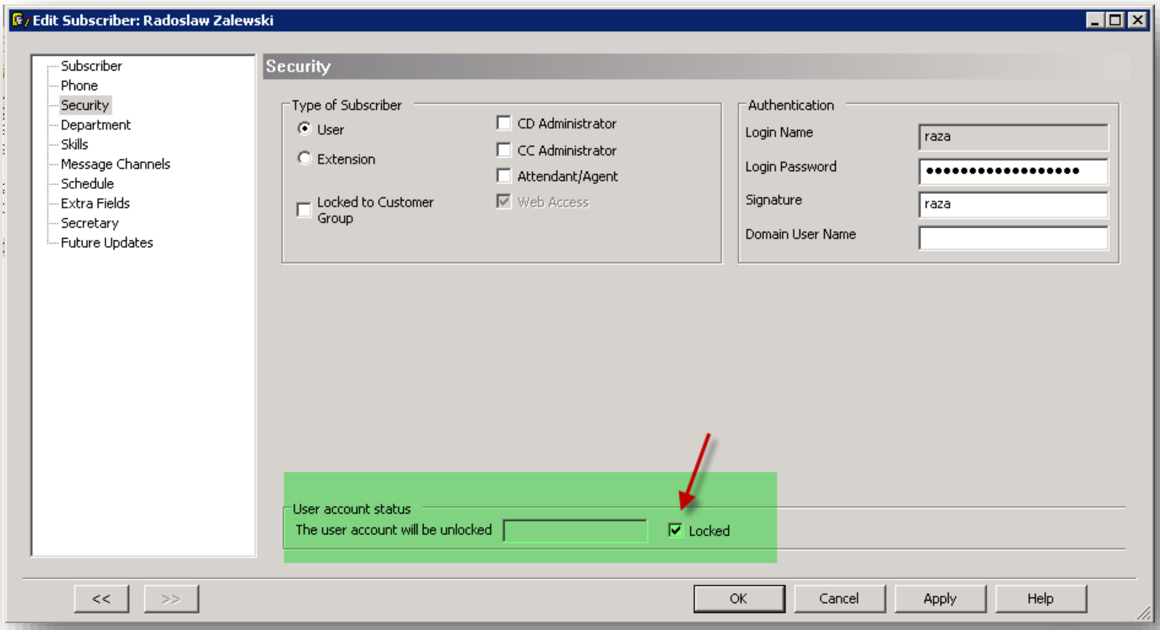
Account locking after failed login attempts is a feature that can be enabled by the technician setting up Enghouse Trio. This will force additional security upon the Enghouse Trio.

First of all the technician can set the number of retries per login attempt, this mean how many t tries the user can do before the account is temporarily locked

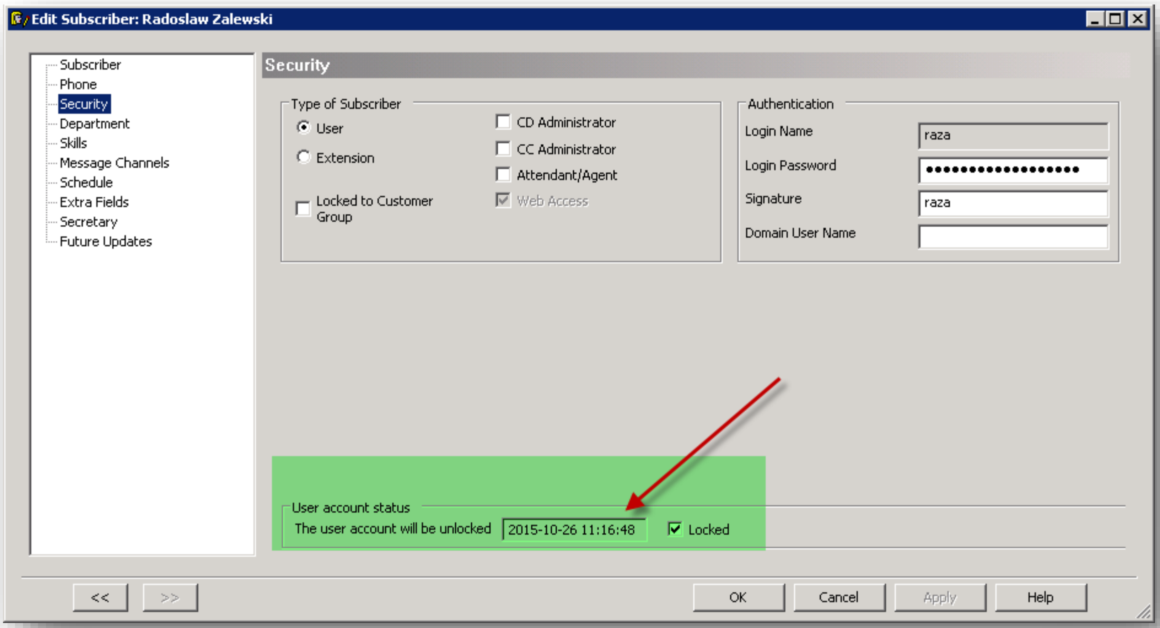
The temporary locked time can be set to a number of minutes before the account is available for login again.

The technician is also able to define the number of login attempts, meaning that how many temporary locked will be set before permanently locking the account.

Once the account is permanently locked only the user of the Company Directory administrator client can make the account available to login again.



An example of permanently locked account



Example of temporarily locked account:

13.1.4 Locked out users whose passwords do not meet the complexity

The technician that is setting up Enghouse Trio can activate a parameter that will prevent logins with accounts whose passwords does not fit the complexity required.

This is mainly a feature adapted for systems that are upgrading from earlier versions of Enghouse Trio. It can be hard to distribute new password to all users so when upgrading the old passwords can be valid for a while (decided by customer) until the parameter is switched on. This will give the users time to change their passwords to meet the new requirements.

13.2 Trio Administrator audit

The Trio Adminstrator has a audit functionality.. In the new version changes are logged in an audit log that is available on the Enghouse Trio server.

13.2.1 How is it logged?

The changes to Subscribers, Agents, Services/queues, Contact Center schedules, Tag lists, Post processing lists, Roles, Playlists and personal greetings are logged.

13.2.2 What is not logged?

Typical changes to the Company directory settings like department, titles, skills/keywords, information chart and referral schedules are not logged.

13.2.3 What is being logged?

As soon as the administrator opens a queue, agent or other for editing the CHANGE will be logged, even if no changes are made.

Basically the system will log when a change has been made, by which administrator and on what object.

When new Agents, queues and other are added these are logged as CHANGE.

When Agents, queues and other are removed the changes are logged as DELETE.

13.2.4 Example of a Audit logfile

```
2015-10-20 12:45:16  | Resource name: Backoffice (1)        | Resource type: Role (1010)        | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:45:28  | Resource name: Test (1)              | Resource type: PlayList (1012)    | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:47:49  | Resource name: Agent1 Agent1 (2)     | Resource type: Greeting (1013)    | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:47:49  | Resource name: Agent2 Agent2 (3)     | Resource type: Greeting (1013)    | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:53:53  | Resource name: Agent1 Agent1 (2)     | Resource type: Agent (1001)       | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:57:29  | Resource name: Agent1 Agent1 (2)     | Resource type: Agent (1001)       | Edited by: CDCC Admin (10)      | Type of edit: CHANGE (0)    | CCID:  1
2015-10-20 12:57:58  | Resource name:  (3)                  | Resource type: Service (1002)     | Edited by: CDCC Admin (10)      | Type of edit: DELETE (1)    | CCID:  1
```

13.2.5 Storage of the audit file

The changes are logged continuously in a file named AuditTrail.log that is placed in the default directory for Company Directory 1, for example: D:\TE\ProgramData\CD1\log.

The file has a maximum size of 10 Megabytes, 2 files are kept, where the oldest file is being removed when needed.

13.3 Interaction Studio audit

In interaction Studio it is possible to see the audit log. This is helpful when searching for whom did the last changes etc. The audit log displays the date, who made the change, the version and what has been changed.

13.4 Single sign on (SSO)

Enghouse Trio supports validation of users with external identity providers (IDP) such as Active Directory Federation services (ADFS), Azure AD, IDPs using SAML 2.0 and Windows authentication. When the user has logged in to the first Trio application, the following Trio applications does not require any log in.

13.4.1 Customer Benefit

13.4.1.1 Easier to administrate

Using SSO means centralized user credential administration with support for complexity rules and password lifecycles managed in the centralized system, for example Microsoft Active Directory. The IT personnel can administrate access to Trio using the same tools as they use for all other user accounts.

13.4.1.2 Sign in once

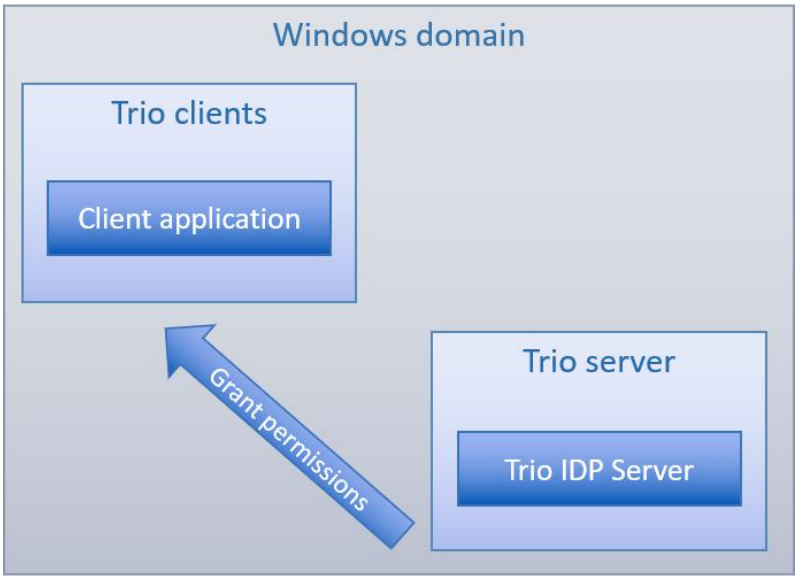
The user only needs to remember one set of passwords. When the user clicks on one of the supported Enghouse Trio clients the password from Windows or another external IDP will be used. Once the user is logged in to one Trio application, the next application will start without the need of logging in again (see supported clients below).

13.4.2 Different login alternatives

13.4.2.1 Windows login

Authentication is already performed by Windows login (often from MS AD when the users logs in to the PC) which means that Enghouse Trio can rely on the answer from Windows when granting access to the Trio applications.

The user chooses to login by pressing the Windows button in the Trio login form. The browser is redirected back to the Trio module that enables Windows authentication. The user's credentials are than validated, and if there are no valid Windows credentials the user is asked to fill such in. Once validated, Trio IDP server approves the user and sends back claims with Trio permissions. After this the application starts and the claims are reused by other Trio applications based on the established session which means that the user does not need to authenticate again.



If need to change user, the user must logout from Windows and login again or use “switch user” feature in Windows.

Permissions to Trio applications are still handled by Enghouse Trio and are managed using Trio Administrator.

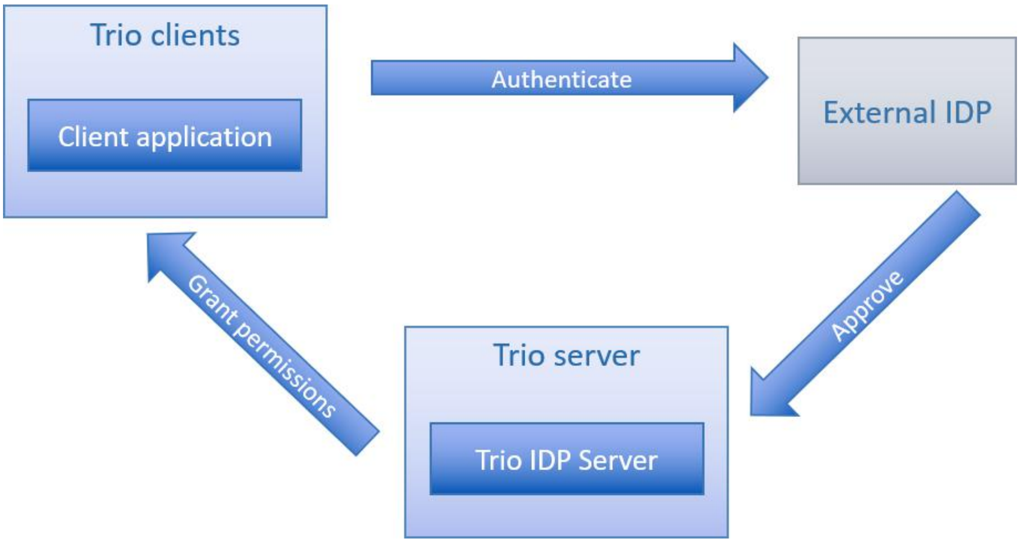
13.4.2.2 External IDPs

Trio SSO can be configured to use one or multiple instances of these external IDPs:

- ADFS (if external access is required, only one instance is supported)
- Azure AD
- Any IDP using SAML 2.0

Authentication is performed with the external IDP and once the user has been approved, Enghouse Trio will grant access to Trio resources connected to the user identity.

The user chooses to login by clicking the button for the IDP to use in the Trio login form. The user is then redirected to the external IDP where the user’s credentials are validated and if approved, the user is redirected back to the Trio IDP server. The Trio IDP server approves the user and sends back claims with Trio permissions. After this, the application starts and the claims are reused by other Trio applications based on the established session which means that the user does not need to authenticate again.



The user can sign out from the external IDP and this way change the user in the Enghouse Trio system if necessary.

Permissions to Trio applications are still handled by Enghouse Trio and are managed using Trio Administrator.

13.4.2.3 Trio login

Even if the customer does not have an integration with an external IDP, SSO will be used for the supported Trio clients. Login credentials in Trio will then be used to authenticate the users.

When starting an Enghouse Trio application, the Trio credentials are entered on the Trio IDP server web page. Once the user has logged in, other Enghouse Trio applications will be signed in automatically.

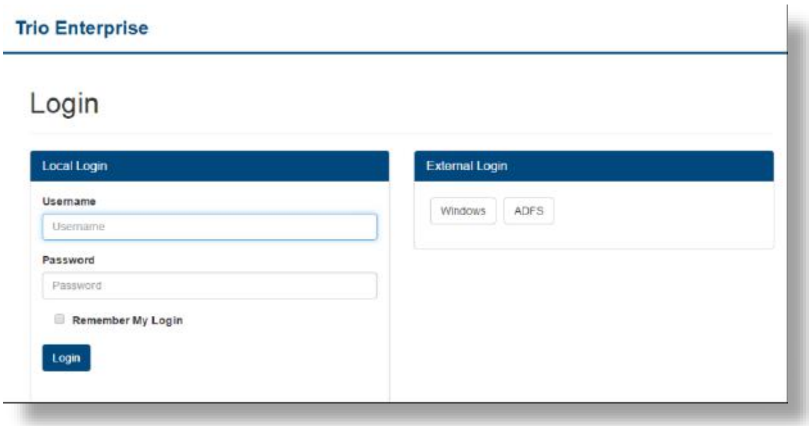
If the customer uses an external IDP server for authentication in Trio, the possibility to log in using Trio credentials can be disabled.

13.4.3 Supported clients

- Trio Agent (Web and Client)
- Trio Administrator (Web and Client)
- Trio User (When logging in from a smartphone Windows credentials need to be specified manually. Forced Windows and ADFS is not supported from smartphones)
- Trio Recording Browser
- Trio Statistics
- Data Manager

13.4.4 How does it work?

When the user wants to log in to any of the supported clients, a web based log in page is displayed.

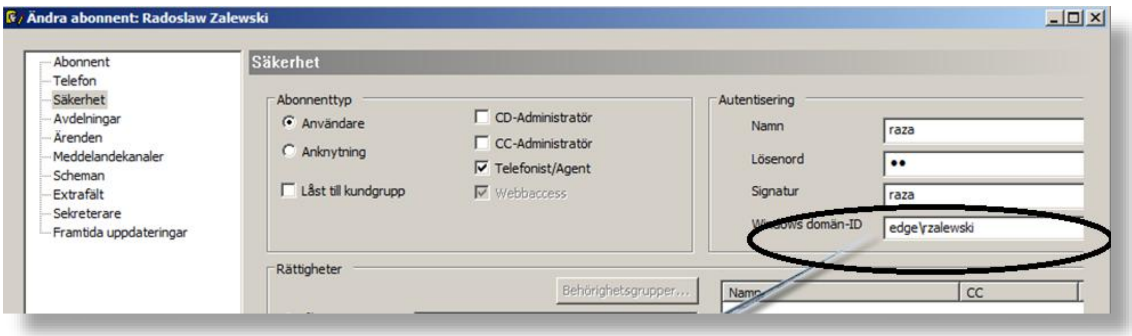


If any external IDPs are configured, each of them has a button under External Login. It is possible for a customer to have different log in for different users but usually the customer will have one.

Once authentication is completed, another web page opens to tell the user that he/she is now logged in. When the user opens another SSO supported Trio Application, no login is required.

The user can save the login so next time there will be no need to login to the first application.

In Trio Administrator the user’s ID in the external IDP has to be filled in.



13.4.4.1 External access

All authentication methods can be used to access most of the Trio web applications externally.

If using ADFS, Microsoft Web Application Proxy (WAP) is set up on a DMZ server and serves as a reverse proxy for the Trio web applications on the Trio core server. If external access for ADFS is configured, only one instance of ADFS can be used in the system.

If using Azure AD or a SAML2 IDP the Trio Applications are installed on a DMZ server for external access. The same address can be used to reach the applications internally on the Trio core server. This requires Split DNS configuration.

13.4.5 Special considerations

13.4.5.1General prerequisites

- First-party cookies support is required from users browser.
- To keep authenitcation status when closing the browser, the cookie must be retained.
- The integrations with external IDPs require some settings in the external system. See the installation manual for details.

13.4.5.2Compability chart

Autentication ->	Trio login	Windows Log in	ADFS Log in	SAML 2.0 and Azure AD
User in same Active Directory Domain as Trio Server	OK	OK, Works together with Trio login.	OK, if ADFS is supported	N/A
User in different Active Directory Domain as Trio Server	OK, The Trio Server set as trusted site or be listed as local intranet site.	NOT OK	OK, if ADFS supports all users. Works together with Trio login.	N/A
Multiple Active Directory Domains	OK	OK, Requires that all Windows Active Directory domains trust each other, i.e. intra domain trusts.	OK, if ADFS supports all users. Works together with Trio login.	N/A
Multiple ADFS Sources	OK	NOT OK	OK, for internal use. If external access is required, only one ADFS source can be used.	N/A

13.5 IPv6

In Enghouse Trio the most client applications has been IPv6 enabled. This solution is very suitable for customers implementing IPv6 in the client segments of their networks as well as for mobile users.

The customer can benefit from for example the Direct Access functionality available in Windows 10 without the need of backend proxies except of the equipment needed for Direct Access.

13.5.1 Server components

Enghouse Trio server and its internal components communicate over IPv4, meaning that IPv4 is required for multiple server deployments as well as communication with external services such as SIP trunks, Calendaring systems etc

13.5.2 Client overview

The following table shows the status of different clients in Enghouse Trio:

Client	IPv6 supported	Note
Trio Agent Client/ Enterprise Attendant	**Supported**	
Trio Agent Web	**Supported**	
Trio Administrator	**Supported**	
Trio User	**Supported**	
Trio Guest	**Supported**	
Trio Statistics	**Supported**	
Web Statistics	**Supported**	
Outbound Call (Telemarketing)	**Supported**	
Recording Browser	**Supported**	
Interaction Studio	**Supported**	
Visit clients	**Not Supported**	
VoiceMail Admin	**Not Supported**	
Mobile Agent APP- Trio CC	**Supported**	
Monitor	**Not Supported**	
Phone Agent APP – Trio Agent	**Supported**	
Trio Data Manger	**Supported**	

13.6 SRTP

Enghouse Trio supports SRTP for the PBX MX-One and Cisco with following limitations:

- Open line and multiple line interface will not be supported.
- Recording will not be made in “stereo”. The sound file will be mixed.
- Early media is not supported
- Route optimization is not supported.
- Auto Attendant is not supported.

13.7 Windows firewall on Enghouse Trio servers

Enghouse Trio 8 has been prepared to automatically configure the Windows Firewall in the Windows Server to support the specific deployment for the customer.

This way the Windows Firewall is automatically configured and secured based on the Enghouse Trio needs and depending on what Enghouse Trio modules has been enabled.

Any unnecessary access to the Windows server is blocked by Windows firewall further securing the server from threats.

13.8 Trio Agent and Trio Administrator over internet

Trio User has been available to be accessed over internet in previous releases, in Enghouse Trio the administrative and agent clients can access Enghouse Trio over internet in a similar way.

Similar to the need for web-based administration we see that many of our deployments are complex to deliver Enghouse Trio since there is a need to establish VPN connections between the hosting center or integrators datacenter and the end customer.

This way to access the clients in a secure manner opens up for deliveries from public cloud services such as Microsoft Azure or publicly available based datacenters.

13.8.1 Deployment details

The integration is based on TLS by default by Trio self-signed, created by the server, certificates that are issued when Trio server components are activated. It will also be possible to use customers own certificates when so needed but will require some additional settings of course then using the built in functionality.

If the clients shall access the Enghouse Trio over the open internet the Enghouse Trio failover shall not be used and other ways to achive redundancy are recommended like virtualization.

13.8.2 Existing clients when upgrading to Enghouse Trio 9

What happens to the installed clients if you update to Enghouse Trio 9?

In Enghouse Trio 8.1 local users, using the same network will be able to connect to the Enghouse Trio system the same way as before; this will lower the risk when updating the Enghouse Trio system to the new version.

However, if some external users shall be able to access the system there will be an ability to activate external access for these users that will run a specific client installation package.

Client	Prepared for access from Internet	Note
Trio Agent Web		
Trio Agent Client/Enterprise Attendant	Prepared	
Trio Administrator Client	Prepared	
Trio Administrator Web	Prepared	
Assistant for Web	Not Prepared	Legacy, replaced by Trio User

Trio Statistics	Prepared	HTTPS recommended
Web Statistics	Not Prepared	
Outbound Call (Telemarketing)	Not Prepared	
Recording Browser	Prepared	
Interaction Studio	Prepared	
Visit clients	Not Prepared	
Voicemail Admin	Prepared	
Mobile Agent APP- Trio CC	Prepared	
Monitor	Prepared	
Phone Agent APP – Trio Agent	Prepared	
Trio Referral	Prepared	
Trio User	Prepared	
Trio Guest	Prepared	
Datamanager	Prepared	

14 Professional Services

14.1 Enghouse Trio Customization Art.No. T800100

We offer development of special adaptive features and integrations outside Enghouse Interactive's standard products. An adaptation is designed and developed with a special solution according to a customer's unique business demands. The aim is that you as a customer will have a customized solution that fits your and your clients' specific need that the standard product are not able to cover.

A customization is an adaptation or change of functionality within the Trio concept and must be limited in time, technique and version of Trio software. A completely new functionality should only be regarded as a change request if Trio decides that this new function should become part of the standard functionality in the next version of the Trio software.

Examples of customizations are:

• Advanced CRM Integrations

• Integrations with survey system for customer and employee surveys

• Advanced IVR solutions

15 3rd party software

15.1 Nuance Speech Suite (Art.No. TP1001001)

15.1.1 Customer benefits

With Nuance Speech Suite, the customer receives the base used for speech recognition. The package contains a speech recognizer based on Nuance Recognizer 11 as well as a text to speech license based on Nuance Vocalizer.

Package contains

- 1 Nuance Recognizer 11 Tier 3 including one language
- 1 Nuance Vocalizer 7 including one language

15.1.2 How does it work?

Auto attendant server terminates calls bridged by Trio. The call is answered with pre-recorded phrases. The speech recognition is used to interpret what the caller says and text too speech reads the dynamic texts such as names.

15.1.3 How is it licensed?

One license is required for each Enterprise Auto Attendant Agent (Danish. English,Swedish or Norwegian) (Art.No. 7011165- 7011168), minimum 2 licenses.

15.2 Nuance Speech Suite Additional Language (Art.No. TP1001002)

15.2.1 Customer Benefits

In cases where the customer wants the Trio Auto Attendant to be able to handle calls in different languages, such as both English and Swedish, you need to purchase a Nuance Speech Suite Additional Language (Art.No. TP1001002).

15.2.2 How does it work?

With this license, each ASR and TTS channel can either handle, in this example, Swedish or English. This provides an opportunity for customers to speak in their native language. A system can have different numbers to the different languages or the person calling in can choose English or Swedish.

15.2.3 How is it licensed?

A license is required for each Enterprise Auto Attendant Agent Additional language (Danish. English,Swedish or Norwegian) (Art.No. P011165- P011168). Minimum 2 licenses.

15.3 Visitlog (Art.No. TPR1002)

15.3.1 Customer Benefits

Visitlog is the recommended replacement system to match and replace Trio Visit. Visitlog is a third-party solution provided by RIV software https://visitlog.se/.

Visitlog is a visitor management system that helps you reduce the workload at the reception and make it easier for visitors. Visitlog gives each customer the opportunity to customize functions and appearance, such as the company's name, log on e.g. trays and labels. Visitlog can be connected to a number of different services such as MS Outlook, Exchange server, Active Directory and BookitWise smooth registration and management process.

Visitlog helps customers gain control over visits, visitors, spaces for meetings, parking permits and also track visitor history and keeps track of visitors and visitors during the day.

15.3.2 How does it work?

Visitlog requires the Trio API to be active, and Trio Version Trio 9.1/9.2 later is required

Visitlog connects to Trio using the Trio API and Visitlog builds up employee data by replicating data from the Trio Company Directory using the Trio API.

15.3.3 How is it licensed?

Visitlog is offered on a Term basis and the default offering is 36 months. A PS package is also required, this includes installation and set up. For further information see your Account Manager.

Hardware and installation is supplied and managed by RIV Software