Appendix B – User Requirements

The National Archives' Unified Communications User Requirements

Current Set-up Summary

TNA is single site, located in Kew, Richmond. TNA employs circa 550 full-time staff. Traditionally our workforce is office-based with most using PC client softphones, with a small proportion of desk phones and approx. 175 analogue DECT units. Our current soft Voice and Video clients consist of 8X8 and Teams. These apps are used both on PC and mobile apps, while DECT is still in use by our onsite teams, such as security, facilities, IT, etc.

TNA's IT equipment is in a secure environment at its site in Kew. Many services are cloud based, such as our voice, contact centre, video and unified communications, web filtering hybrid cloud proxy, Microsoft O365, to mention a few.

This contract renewal offers us the opportunity to better integrate our communications platform with our technology roadmap of using Office 365 and Microsoft Teams. We have determined that our preferred client for all unified communications is Microsoft Teams.

Requirement 1 – Analogue and DECT

The National Archives (TNA) currently has an Analogue DECT Infrastructure, with codec boxes to land DDI services into the DECT system, and emergency phones situated in lifts and various locations around the TNA site. We currently have approximately 95 base stations located around the site at Kew, 175 handsets linked to 8x8 extensions, ASCOM IP-Blades connected to an Audio Codes M800B, which uses cloud PBX and SIP registration and emergency analogue phones connected across two ATA Audio Codes MP-124E FXS, which use cloud PBX and SIP registration.

The supplier must support our use of on-site analogue emergency phones and DECT analogue infrastructure as described in the main ITT and here. Support includes the analogue hardware infrastructure equipment but excludes handsets, structured and endpoint cabling.

Long-term goals

Our long-term plan is to replace our current DECT system for an IP-based fully integrated site-mobile telephony solution. The supplier's solution must support and integrate with the current Analogue DECT infrastructure, but also support the installation of New IP Based DECT technology in the future and consolidate DECT hand units into mobile devices that support and work both with WI-FI & Digital DECT services seamlessly.

	Current Configuration and set-up of DECT	
1.	Reliable Signal 100% across the TNA Site	
2.	Handset (Talk Time) 8 Hours	
3.	Handset 'Man Down' call function	
4.	Emergency Pager	
5.	Group text messaging service (Pre-set message) along with group chat service	
6.	Call Transfer	
7.	Scheduled and on-demand reports	
8.	1 to many calling (walkie talkie facility)	
9.	Private peer to peer calling	
10.	Apply different ring tones coming from different contacts or Ext. E.g Emergency or Medical lines	

Requirement 2 - Voice

TNA has recently adopted Microsoft Teams as it is unified Comms Interface and Int/Ext. collaboration tool. TNA require that the telephony solution will integrate with our current analogue telephony solution to land DDI into the Teams application. This solution will be required to be connected to our various physical hardware we have on site for example, Poly VVX311 desk phones, analogue DECT phones, lift phones together with emergency phones. To support our future plans, the solution must also have the capability to support the introduction of IP-based DECT services.

	Requirement	Essential / Desirable
1.	Online billing including call logs of all numbers	E
2.	On screen pop up to answer calls	E
3.	Transfer call to another logged in mobile device	D
4.	Transfer call to different user /Ext. or Hunt Group	E
5.	Compatible with modern digital DECT systems? (Currently Analogue, looking to upgrade)	E
6.	Integration into Microsoft Teams	E
7.	Hunt, pick-up and ring group set up	E
8.	Presence and Online/ Offline status	E
9.	Outgoing and incoming calls via Teams	E
10.	Individual DDIs for every user	E
11.	Compatible with existing DECT hardware – ATA blades/ Analogue lines	E
12.	Voicemail – With Ability to assign retention policies	E
13.	Voicemail notification by email and/or with audio file attached	E
14.	On hold facility	E
15.	Retaining existing user assigned DDI number with extensions	E

16.	Unified address book (ability to access external contacts in Teams and Outlook alike)	D
17.	Mobile phone Teams application integration for common mobile operating systems	E
18.	Digital Corporate Phone Directory	E
19	Management Dashboard/Portal	E
20.	Ability to incorporate Ring Groups (at least 9)	E
21.	Assigned Account manager	E
22.	Advanced call forwarding	E
23.	Auto attendant for inbound callers – customisable greetings and schedules for active hours, after hours, out of office and during business hours	E
24.	PSTN telephone number presented in Teams meetings for audio only participants	E
25.	Full Teams functionality for meetings, chat and collaboration	E
26	Management Dashboard	E

Optional Requirement 3 – Live Web Chat System

Our public engagement department uses a Live Web chat system to communicate with our audiences. The department is looking to facilitate staff in assisting members of the public using web chat.

	Requirement	Essential / Desirable
1	Integration into O365	E
2	Integration into common cloud telephony systems or Microsoft Teams	E
3	Ability to share documents over Chat	E
4	Ability to share screens over chat	E
5	Ability to start a voice or video call with recipient from live chat software and have full control	D
6	Ability for agents to manage at least 3 concurrent chats	E
7	To have the facility to vary the amount of concurrent chats per agent	D
8	The ability to create and manage different agent groups for expertise purposes	E
9	The ability to transfer chats between different agents	E
10	Pre-typed responses for quick response (easily accessible	E
11	To tailor pre-typed responses for specific agent groups	E
12	Ability to tag chats for the purpose of creating bespoke statistics	E
13	Ability to monitor another agent live	E
14	Ability to see what an enquirer is typing before they send it	E

15	An auto-response for first contact by enquirer	E
16	A pre-chat survey that can be edited	E
17	A post-chat survey that can be edited	E
18	Easy to access archived chats (by agent/ Group/ Date)	E
19	The ability to view which guides an enquirer has visited	E
20	Ability for the enquirer to save or send to themselves a copy of the chat	E
21	Pop-up warnings to alert an agent a new chat has arrived	E
22	Adviser Visual availability	E

Requirement 4 - Virtual Contact Centre

At The National Archives we have two virtual contact centres. Both take calls from internal and external customers. They each are assigned a main telephone number(s) and extension to contact where the calls would have to go through a series of scripts to reach an agent.

	Requirement	Essential / Desirable
1.	Transfer calls to users around the organisation (Switchboard facility)	E
2.	Integration into Microsoft Teams	D
3.	Office 365 integration	D
4.	Take incoming calls – Teams - Together with on-screen pop up	D
5.	Retention of existing phone numbers	E
6.	Support multiple incoming calls on main number	E
7.	Night/ day service	E
8.	Support pre-recorded response/ customer queue/ night day service/ public holidays/ public opening hours and days	E
8a.	Text-to-speech recording	D
9.	Auto attendant	E
10.	Call forwarding to other Contact Centre agents	E
11.	Management dashboard with multiple administrators	E
12.	Real-time reporting dashboard	E
13.	Agent status active/ offline	E
14.	Wallboard reporting	E
15.	IVRs	E
15a.	IVRs with voice recognition	D
16.	Audio bridging, support SIP H323 protocols	E
17.	Modern easy to use software without a reliance on dated plugins and browsers	E
18.	Central Phone directory - call by name	E

19.	Ability to present the Contact Centre extension number on outgoing calls	E
20.	Ability to add external contacts to address book	E
21.	Integration into common CRM systems and specifically Dynamics 365	E
22.	Assigned Primary Account/ Technical Contact	E
23.	Assigned Dedicated Customer Account Manager	E
24.	Windows 10/commonly used browser compatibility	E
25.	Statistical reporting to ideally include talk time by agent	E
26.	Call information including calls, total minutes, number of active users and average call time	E
27.	Excellent call quality and packet loss reduction, call history together with returning customers and mandatory call recording	E
28.	Scheduled and on-demand reports	E
29.	Data Encryption during transit	E
30.	Mobile phone application for common platforms	E
31.	Call monitoring/ Whispering/ joining another call (Barging)	E
32.	Scripting ability	E
33.	Automated end of call survey	D
34.	Caller queue position notification	E
35.	Call logs – alerts for frequent callers	D
36.	Call logs – alerts for previous abusive callers and ability to block	D