

QMATIC

Administrator's Guide

Orchestra 7.4

212.01E

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1. What's New

This section describes what is new in this manual, since the latest original release of a Qmatic Orchestra upgrade

Version	Chapter	Change
01.A	User Management	Rename LDAP/SAML tab to IdP Mappings
	Surface Editor	Edit note about the preview function
01.B	Surface Editor	Remove outdated section, rearranged the content and improved readability. Add Generic Printer as Ticket Device Type.
	Business Configuration	Add information about possibility to select more than one ticket layout for a service. Add section about hardware license information in the Edit branch page.
	Calendar	Add note about how the booking logic is impacted is resources have blocking appointments.
01.C	Business Configuration	Add new segmentation rules.
	Surface Editor	Add Screen reader text property to a number of components

Version	Chapter	Change
01.D	Presentation	Update section about sorting and calling order logic
	Business Configuration	Add scheduling of branch publishing and other improvements of the Branches page.01.E
01.E	Business Configuration	Add new calling rule conditions

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1. Presentation

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Welcome!

Welcome to Qmatic Orchestra - an advanced system for Customer Journey Management.

To make sure that customers are served in a fair and efficient manner is Qmatic Orchestra's most important task.

Qmatic Orchestra is a collection of high quality components that can help you create a wide range of Customer Journey Management solutions.

This guide describes a neutral standard system not adapted to any specific customer or market segment.

About services, queues and visit numbers

One of the first things you need to do is to define the services your organization offers. Services represent the choices customers can make on for example a touch screen kiosk. A staff member can also choose a service for the customer. A service choice results in a visit number being generated in the system and usually printed on a physical ticket.

When the visit is created, the visit is placed in a queue. The queue specifies the visit number sequence. Two or more services that belong to the same queue also share the same number sequence, e.g. A001-A999.

When a staff member calls the next customer, the system looks at the staff member's work profile. This defines from which queue the next visit should be called. The work profile can for example define that a visit should be called from the queue with the longest waiting time. From that queue, the first visit in the queue is called.

Multi-service functionality

It is possible to configure the system so that customers can select several services. If different services target different queues, the first service defines what queue the visit is placed into to start with. When that visit is called and then served, the ticket is automatically placed in the queue of the second service, and so on.

By default, the ticket is transferred to the next queue sorted based on the visit lifetime. However, this is a system parameter that can be changed and you can also choose to always transfer a multi-service visit first in line or last in line.

Sorting and calling order logic

Central concepts

Below is an explanation of what we mean by these different concepts that are central in our solution:

- **Waiting time:** the time that the customer has waited in the current queue, without being called. Based on the time the visit was placed in the queue (referred to as “enter queue time”).
- **Total waiting time:** the time since the visit was created (referred to as “visit create time”), minus any transaction time, i.e. the time staff has spent serving the customer. This includes the current queue plus the waiting time in *all* queues the visit has been in.
- **Visit lifetime:** The time since the visit was created.
- **Transaction time:** The time a staff member spends serving a customer, i.e. the time from the visit is called until the staff member is done providing the service. Transaction time is sometimes referred to as “serving time”.
- **Appointment waiting time:** The time that has passed since the appointment start time. This means that the appointment waiting time is *not* based on the time when the visit is created (i.e. when the customer checks in).

Example normal visit

A customer selects a service and a visit is created in Queue A at 11:00. The customer is still waiting at 11:20.

- Waiting time: 20 minutes.
- Total waiting time: 20 minutes
- Visit lifetime: 20 minutes

The customer is then called at 11.20 and spends 25 minutes at the counter. The customer is then transferred to Queue B at 11.45. At 12:00, the following applies:

- Waiting time: 15 minutes
- Total waiting time: 35 minutes (20 min in Queue A + 15 minutes in Queue B)
- Visit lifetime: 60 minutes (35 minutes total waiting time + 25 minutes transaction time)

For the queuing and calling of visits to become as fair as possible, even when customers are for example transferred from one queue to another, we use the visit lifetime to sort visits.

Sorting logic examples

Below, the sorting logic is illustrated with the help of three examples, one for normal visits, one for appointment visits, and one for multi-service visits.

Example 1, normal visits

The following example illustrates in which order visits are sorted in a queue when a visit is transferred.

We have two queues with three customers in each queue. When visits are inserted into a queue, they are sorted by visit lifetime. So the visit that was created first is placed first in line.

Table 1: Queue One at 12:30

Visit number	Waiting time (based on enter queue time)	Visit lifetime (based on visit create time)	Visit create time
A1	00:30	00:30	12:00
A2	00:20	00:20	12:10
A3	00:10	00:10	12:20

Table 2: Queue Two at 12:30

Visit Number	Waiting time (based on enter queue time)	Visit lifetime (based on visit create time)	Visit create time
B1	00:25	00:25	12:05
B2	00:15	00:15	12:15
B3	00:05	00:05	12:25

If we have a work profile that is calling from *both* queues, based on max visit lifetime, Visit A1 will be called at 12:30. Visit A1 is served for 10 minutes and is then transferred (sorted, based on visit lifetime) to Queue Two, at 12:40. The two queues now look like this:

Table 3: Queue One at 12:40

Visit number	Waiting time (based on enter queue time)	Visit lifetime (based on visit create time)	Visit create time
A2	00:30	00:30	12:10

Table 3: Queue One at 12:40

Visit number	Waiting time (based on enter queue time)	Visit lifetime (based on visit create time)	Visit create time
A3	00:20	00:20	12:20

Table 4: Queue Two at 12:40

Visit Number	Waiting time (based on enter queue time)	Visit lifetime (based on visit create time)	Visit create time
A1	00:00	00:40	12:00
B1	00:35	00:35	12:05
B2	00:25	00:25	12:15
B3	00:15	00:15	12:25

Visit A1 now has a total waiting time of 30 minutes, a transaction time of 10 minutes, a waiting time (in the current queue) of 0 minutes and a visit lifetime of 40 minutes. The visit lifetime determined the position of Visit A1 when it was transferred into Queue Two.

If we still use a work profile that calls by max visit lifetime, the visits will now be called in the following order: A1, B1, A2, B2, A3, B3.

Example 2, Appointment visits

The following example illustrates how these times are calculated and how they affect for example which place the customer gets in a queue when the appointment visit is transferred, as well as in which order the customers are called.

What differs an appointment queue from a normal queue is that visits in an appointment queue are sorted according to the appointment start time. Also, the visit lifetime and the waiting time in an appointment queue is based on the appointment start time.

We have two queues with three customers in each queue. One of the queues is an appointment queue:

Table 5: Appointment Queue One at 12:40

Visit No	Waiting time	Appt waiting time	Appt Visit lifetime	Visit create time	Appt start time
A1	N/A	00:30	00:30	12:00	12:10
A2	N/A	00:20	00:20	12:10	12:20
A3	N/A	00:10	00:10	12:35	12:30

We can see in Table 5 that Visit A3 checked in 5 minutes late, but the appointment waiting time is calculated based on the appointment start time .

Table 6: Queue Two at 12:40

Visit No	Waiting time	Appt waiting time	Visit lifetime	Visit create time	Appt start time
B1	00:28	N/A	00:28	12:12	N/A
B2	00:25	N/A	00:25	12:15	N/A
B3	00:15	N/A	00:15	12:25	N/A

If we have a work profile that is calling from *both* queues, based on max visit lifetime, Visit A1 is called at 12:40. Visit A1 is then transferred (sorted, which is always based on visit lifetime) to Queue Two at 12:50. The two queues now look like this:

Table 7: Appointment Queue One at 12:50

Visit No	Waiting time	Appt waiting time	Visit lifetime	Visit create time	Appt start time
A2	N/A	00:30	00:30	12:10	12:20
A3	N/A	00:20	00:20	12:35	12:30

Table 8: Queue Two at 12:50

Visit No	Waiting time	Appt waiting time	Visit lifetime	Visit create time	Appt start time
A1	00:00	N/A	00:50	12:00	12:10
B1	00:38	N/A	00:38	12:12	N/A
B2	00:35	N/A	00:35	12:15	N/A
B3	00:25	N/A	00:25	12:25	N/A

When visits in appointment queues are transferred sorted to a normal queue, it's when the customer checked in (visit create time) that determines where the visit is placed.

So, Visit A1 has been transferred sorted, based on the visit create time.

If we still use a work profile that is calling from both queues, based on max visit lifetime, the visits will be called in the following order: A1, B1, B2, A2, B3, A3.

If we would instead want to prioritize calling the appointments in the appointment queue as close to the appointment time as possible, we could set up a calling rule that calls based on closest to service level and set the service level for Appointment Queue One to 0 minutes and the service level for Queue Two to e.g. 30 minutes. The visits would then be called in the following order: A2, A3, A1, B1, B2, B3.

⚠ It is never possible to transfer visits from a normal queue or pool to an appointment queue.

Example 3, multi-service visits

Let us say that a customer enters a branch and needs both a passport and an id card. That would be a typical multi-service visit.

When entering the branch, the customer would select both services and since the two services target different queues, the first service, passport, would define which queue the visit ends up in to start with. Once the passport service has been provided, the visit will be automatically transferred to the queue of the second service, id card, based on visit lifetime.

So, we have two queues, with three customers in each queue. One of the visits is a multi-service visit:

Table 9: Queue One at 12:30

Visit Number	Service	Waiting time (based on Enter Queue time)	Visit lifetime (based on Visit create time)	Visit create time
A1	Computers (Refrigerators)	00:30	00:30	12:00
A2	Computers	00:20	00:20	12:10
A3	Computers	00:10	00:10	12:20

Table 10: Queue Two at 12:30

Visit Number	Service	Waiting time (based on Enter Queue time)	Visit lifetime (based on Visit create time)	Visit create time
B1	Refrigerators	00:25	00:25	12:05
B2	Refrigerators	00:15	00:15	12:15
B3	Refrigerators	00:05	00:05	12:25

If we have a work profile that is calling from *both* queues, based on the longest visit lifetime (Visit create time), Visit A1 is called at 12:30, served for 10 minutes and then closed. As it is a multi-service visit, it is then, automatically, transferred (sorted, which is always based on Visit lifetime) to Queue Two, at 12:40. The two queues now look like this:

Table 11: Queue One at 12:40

Visit Number	Service	Waiting time (based on Enter Queue time)	Visit lifetime (based on Visit create time)	Visit create time
A2	Computers	00:30	00:30	12:10

Table 11: Queue One at 12:40

Visit Number	Service	Waiting time (based on Enter Queue time)	Visit lifetime (based on Visit create time)	Visit create time
A3	Computers	00:20	00:20	12:20

Table 12: Queue Two at 12:40

Visit Number	Service	Waiting time	Visit lifetime	Visit create time
A1	(Computers) Refrigerators	00:00	00:40	12:00
B1	Refrigerators	00:35	00:35	12:05
B2	Refrigerators	00:25	00:25	12:15
B3	Refrigerators	00:15	00:15	12:25

Visit A1 now has a Total waiting time of 30 minutes, a Serving time of 10 minutes, a Current waiting time of 0 minutes and a Visit lifetime, based on Visit create time of 40 minutes. Once again, it is the latter that determines the position of Visit A1 when it is transferred into Queue Two.

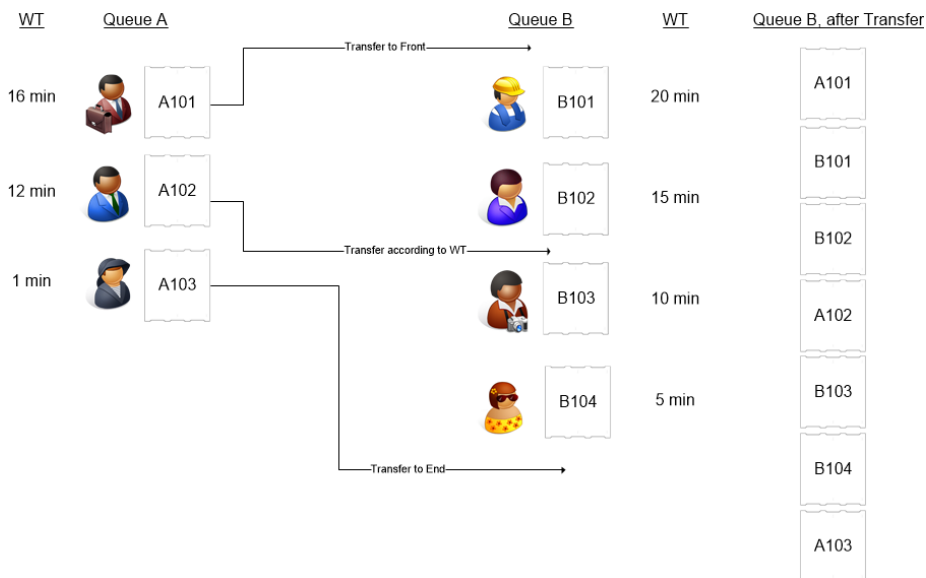
The visits will now be called in the following order, if called by visit lifetime: A1, B1, A2, B2, A3, B3.

Transfer options

The picture below illustrates the different options when visits are transferred and sorted into other queues or pools. The following transfer options are available:

- According to visit lifetime ("sorted"). Note that visits that are transferred with delay are also transferred according to visit lifetime.
- To the end of the queue (last)
- To the front of the queue (first).

⚠ A visit can never be transferred first into a queue or pool and be placed *before* another visit that was already transferred first. Thus, if you try to do two transfer first to the same queue, the visit that is transferred second will not end up first in the queue. It will be inserted after the last visit with sorting policy first.



Recommendations for fair queueing with appointments

In this section, we will go through some recommendations for organizations who use appointments.

Set up appointment queues

When setting up queues, it's important that you segment appointment visits into appointment queues. This makes it possible to set up the system so that appointment customers are called as close as possible to their booked time. When you use calling rules like "Call by max waiting time", the system uses the appointment time to calculate the waiting time. Also, visits in appointment queues are sorted based on the appointment start time.

If you don't segment appointments into appointment queues, appointment visits will be handled just like walk-in visits and they will be sorted according to the check-in time.

Limit how late and early customers can check in

It's recommended to limit how long before and after the appointment time customers can check in on kiosks or by using Mobile Ticket. In general, it's most important to restrict how late they can be, because if customers arrive too late, the risk is that the rest of the appointments on that day are delayed.

- For kiosks, in the appointment arrival widget, enter values for the settings **Appointment Early (Minutes)** and **Appointment Late (Minutes)**.

- In Mobile Ticket, configure a value for **appointment_late** and **appointment_early** in config.json.

ⓘ Note that you cannot limit how early or late a staff member can check in a customer.

Set up segmentation rules based on check in time

You can set up segmentation rules to segment customers into different queues, depending on when they arrive in relation to their booked appointment.

To segment late customers into another queue, use this rule:

- WHEN: When the appointment is <late> by over X minutes, THEN: Go to the assigned queue.

This way, you could segment late appointment customers into a normal queue and not let them cause delays for the subsequent appointments.

To segment on-time customers into a appointment queue, and let the rest go to a normal queue (for example), use this segmentation rule:

- WHEN: When appointment is <early> no more than X minutes AND when the appointment is <late> no more than X minutes, THEN: Go to the assigned queue.

Inform customers about check-in restrictions

It's a good idea to let customers know if you have check-in restrictions. Place this information in the booking confirmation and also in the check in reminder.

Limit how early an appointment can be called

It's recommended to limit how long before the appointment time an appointment visit can be called. This way, you will not reward customers who have checked in way too early (if you allow this).

The setting for this is called **Block early appointments** and can be found in the System Administration application. Note that this setting is applied globally on all branches and all services. The value you set must be less than the "appointment early" setting.

The only case where it is not recommended to do this is if you don't allow cherry picking visits, in which case you could end up in a situation where an early appointment customer is the only visit in the queue and the staff member cannot call that visit.

Set up calling rules based on service level

If you have counters who are calling both appointment customers and drop-in visits, you should set up work profiles with calling rules that calls a visit from the queue that is closest to service level.

Let's say the time is 10.00. A walk-in customer has taken a ticket a 9.45 and has now waited for 15 minutes. You also have an appointment customer who has an

appointment at 10.00 and checked in at 9.55. Ideally, you would want the appointment customer to be called next because you always want to prioritize serving customers who have booked an appointment in time. One way to achieve this is to set the service level for the appointment queue to 0 and set the calling rule to call by closest to service level.

Customer Journey Management Terminology

Below you can find a description of the most common terms used in this manual.

Table 13: Customer Journey Management Terminology

Term	Description
Appointment	An agreed intention to a visit. The appointment may include multiple services (and by that multiple transactions) but it only has <i>one</i> appointment time.
Arrived	Used, for appointments, when a customer has started a visit, i.e. when the customer gets a ticket number.
Branch	An office or department carrying out one or more services in a geographical location.
Called	When the ticket number was called, no matter if the customer responded or not. A transaction that started without the customer entering the queue was never called.
Calling Rule	A set of rules that decide <i>from which queue</i> the next customer should be called. It then calls the first visit in the queue according to the sorting order.
Customer	A customer is a person visiting a branch.
Customer Journey Management	The setup of services, and queues, calling rules and segmentation Rules.
Delivered Service	A kind of mark about what service that the customer got. Not necessarily the service they chose at the Entry Point
Display	Generic display that can change view, e.g. LED or monitor display.

Table 13: Customer Journey Management Terminology

Entered Queue	Every time a customer is placed in a queue during a visit, even if the waiting time is 0. There is a possibility to have a transaction without entering any queue and that is when a service is added when a customer is served without being placed in any queue (multi service without any waiting between services).
Entry Point	A point in the customer journey where the customer selects a service and is assigned to a queue. Can be for example the Reception module or a kiosk.
Information Display	A LED or a graphical display that shows system information.
Journey	A journey includes all activities (visits, transactions, appointments, etc.) that are required to deliver one end result. The exact definition depends on the client but it must be possible to link two activities to place them in the same journey. For example in one appointment, you book the next appointment, belonging to the same journey.
Mark	A user defined value that can be added to a Service Transaction. See Outcome and Delivered Service.
Main Display	A LED or a graphical display in the waiting area that shows the Ticket Id that is called, the Position that is calling and the direction to the Position.
No Show	A customer that does not respond to a call.
Outcome	A mark object that can be added to a service or a delivered service to specify the result of the transaction.
Positional Display	Display above a service point.
Presentation Point	A unit that can display information, for example main displays and positional displays.
Queue	A first in first out list of customers.

Table 13: Customer Journey Management Terminology

Queuing Profile	A part of the branch operation profile that defines the queuing logic of the branch operation profile.
Reception	Where the visit (sometimes) starts, once at the branch.
Served	When there has been at least some interaction between the staff member and the customer during a transaction. This is usually when a customer has responded to a call but it is also when a customer is given a service without being called (multi services). A customer that does not respond to a call (No Show) is never served.
Service	A service is what our client delivers. A task performed by the company for the customer. See also Delivered service and Outcome.
Service Point	A unit where the staff member is handling the requested service for the customer. For example a counter.
Service Transaction	The process of attending a service.
Staff member	A person delivering a service.
Terminal	A hardware service point.
Ticket	Most commonly a physical note with the queue number for a customer. May however also be in the form of for example an SMS or email.
Ticket Id	The reference to the visit. For example a ticket number or booking reference.
Time zones	All events, in stat, are saved with the local branch time.

Table 13: Customer Journey Management Terminology

Transaction	A transaction is the waiting and deliverance of one service. A transaction must always include a service (even if the service never was delivered) and usually includes waiting in a queue. There are two special cases: • Transactions that are interrupted before the customer has been called are still transactions, but they do not include any transaction time. • When a service point delivers multiple services without transferring the customer to queue, each service is a transaction but without any queue or Waiting time.
Visit	A visit is the part of a customer journey where the customer has been assigned a ticket number. The visit continues until the end of the last transaction on the same ticket number.
Work Profile	A work profile calls customers from a specified number of queues with some kind of priority (calling rule).

System description

Components

The *Home* page of Qmatic Orchestra shows which components of the system are installed and available. Here is an example of what the Home page may look like:



Below, the available components of Qmatic Orchestra are listed:

- Counter - application for calling customers.
- Calendar Client - application for managing appointments.
- Connect. A native application for iOS and Android that gives you the possibility to run a counter on a mobile device.
- Concierge - application for creating appointments, checking in customers and creating visits. Available both as a web application and as a native application for iOS and Android.
- Reception - create visits and print tickets.
- Calendar Admin- application for configuring appointment profiles, resources and similar.
- Appointment reception - application for arriving appointments
- Operations Panel - see live branch information in a dashboard.
- Personal Data - manage customer data and retention policies.
- User Management - users, roles, and LDAP integration.
- Business Configuration - Branch configuration, operation profiles, services, etc.
- Surface Editor - surface application designer.
- Context Marketing - manage messages and playlists.
- Hardware Monitoring - Analysis dashboards for hardware monitoring.
- Notification Admin - SMS and Email Administration. For more information, see "Notifications" on page 169.
- System Administration - System settings, LDAP settings, Import / export, license management, unit type templates upload, widget handling, etc.
- Xtend - Add extensions and more functionality to you solution.

Distributed operation

Distributed operation is needed when one of the following applies:

- Available WAN bandwidth is poor or the WAN connectivity is suspect and suffers from high latency.
- The client does not deem the Customer Journey Management system to be a business critical service and prohibits competing for WAN bandwidth with other line of business applications at peak times.

Distributed operation is handled in the following way:

- Central Stat server handling persistence of all statistical data
- Branches are configured to operate on remote Queue Agent instances.
- Distributed Queue Agent connects outbound to central Qmatic Orchestra instance across WAN, communication is bi-directional once connection established.
- Upon connectivity failure between remote Queue Agent and central Qmatic Orchestra, local users continue to operate un-affected
- Distributed Queue Agent keeps local copy of runtime data.
- Distributed Queue Agent sends event data for statistical data handling to central stat server.
- Distributed Queue Agent provides connector interfaces and web terminals for local clients.

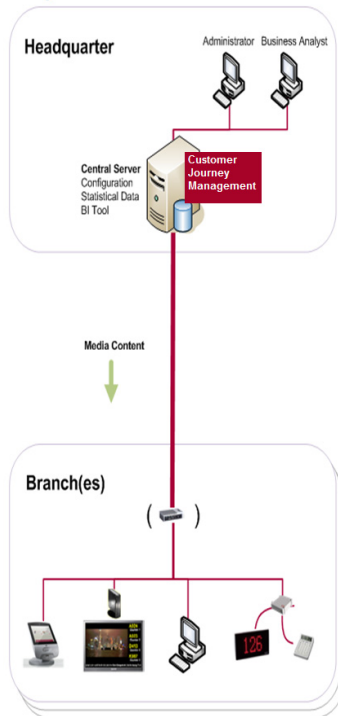
For examples of Distributed Operation deployment, see “Deployment Scenarios” on page 25.

Deployment Scenarios

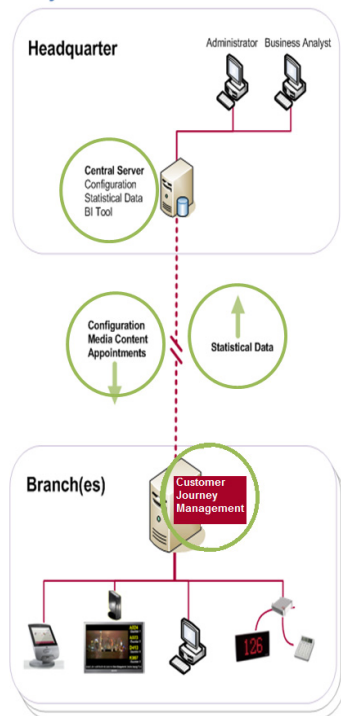
The following pictures show a few examples of deployment scenarios for Qmatic Orchestra.

⚠ There are more deployment options than specified, but these are the most common ones.

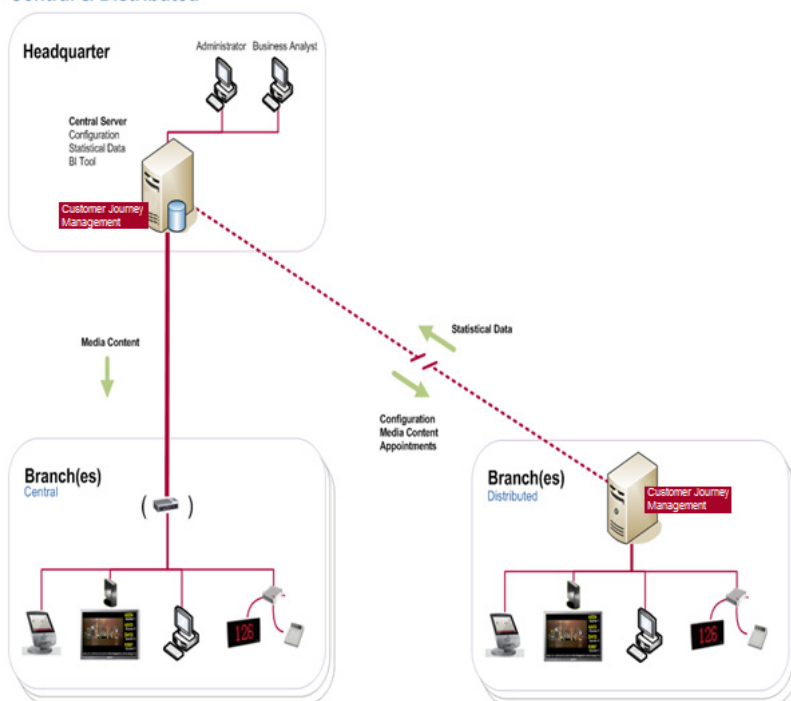
Fully Central

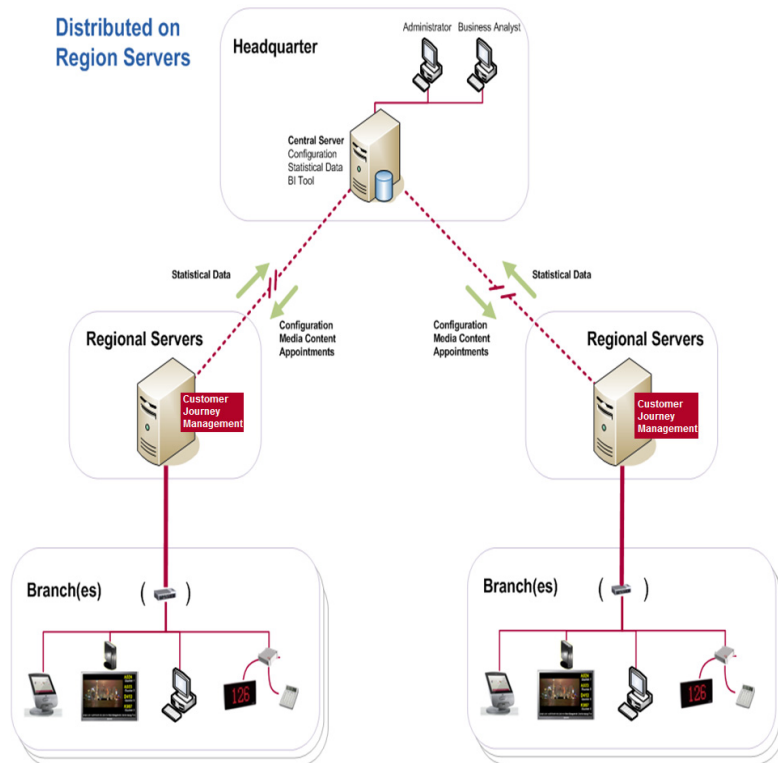


Fully distributed



Central & Distributed





Supported Environments

For more information about supported Operating Systems, Application Servers, Databases and Web Browsers, please refer to the Qmatic Orchestra Data Sheet, which can be found on Qmatic World.

2. Getting Started

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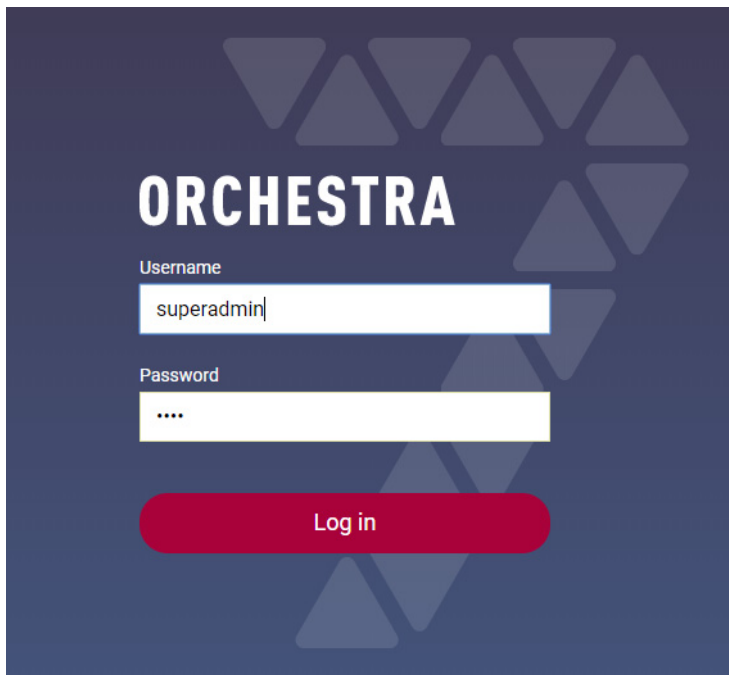
Opening Qmatic Orchestra

Open Qmatic Orchestra by selecting the bookmark for it in your web browser.

Login

Qmatic Orchestra requires a user login and password to gain access. The password is case sensitive.

Users are automatically logged out of Qmatic Orchestra if there is no activity for 60 minutes (default). This idle time can be changed. The idle time does not apply to the terminal.



Administrator roles

Depending on settings at your specific installation, access to the system can be limited in different ways. Your role determines your access to the administration functions and features.

There are normally three default administrator roles:

- BusinessAdministrator
- Client Admin

- SystemAdministrator

The Branch administrator has access to

- The *User Management* application
- The Business Configuration application.
- The *Surface Editor* application

The Client administrator has access to

- All administrative parts of Qmatic Orchestra. The Client Admin role can only be assigned to users by superadmin. The use of this role does not count towards any license limits.

The System administrator has access to

- All access modules.

Database Administration

The Qmatic Orchestra database is subject to normal database maintenance. For information about how to perform this maintenance, see the administration guide for the specific database installed on your system. Note that the following activities are important to do periodically for any database:

- Rebuilding indexes
- Backing up the database
- Checking disk space availability

If these administrative duties are neglected, the database can eventually stop working. Backup is especially important for Microsoft SQL Server® databases as the size of the transaction log keeps growing until the database stops working. However, a periodical backup is always imperative to do, because the backup files are the only data sources available when rescuing a crashed database.

For more information about the Qmatic Orchestra databases, please read the Reference Manual.

Suggested setup order

Qmatic Orchestra, naturally, can be set up in many different ways, but we would like to offer the following setup order, as a guideline:

System Administration Application

1. Add Unit Types. For more information, see the Reference Manual and the Standard Unit Types Guide.

2. Activate your license. For more information, see the Reference Manual.

Business Configuration Application

3. Create Operation Profile.

For more information, see "Operation Profiles Page" on page 51.

4. Create Services.

For more information, "Services" on page 87

5. Add Queues, Segmentation and Work Profiles.

For more information, see "Queuing Profile" on page 54.

6. Manage your Equipment Profile(s).

For more information, see "Calling Rule Conditions - detailed user example" on page 74.

Surface Editor Application

7. Create Surface Applications for:

- Your ticket printer(s), such as a TP, Intro or Vision.

For more information, see "Touch screen surfaces" on page 97.

- Your Media Display(s).

For more information, see "Media display surface" on page 102.

- Your Positional Display(s).

For more information, see "Positional display surfaces" on page 106.

- Your Ticket.

For more information, see "Ticket surfaces" on page 118.

Business Configuration Application

8. Create Branches and set up the equipment connected to each Branch.

For more information, see "Branches" on page 78.

9. Create Branch Hierarchy.

For more information, see see "Branch Hierarchy" on page 86.

User Management Application

10. Create Roles.

For more information, see "Roles" on page 43.

11. Create Users.

For more information, see "Users" on page 39.

Context Marketing Application

12. Manage Context Marketing and Playlists.

For more information, see “Context Marketing” on page 133.

Business Configuration Application

13. Publish your Branches.

For more information, see “Publishing branches” on page 82.

3. User Management

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Users - Roles - Access Modules - Applications

In Qmatic Orchestra, users must have one or several roles to be able to use the system.

The following applies to the relationships between the users, roles, access modules, and applications in Qmatic Orchestra:

- An Qmatic Orchestra user is assigned one or more roles.
- A role consists of one or more access modules.
- An access module gives the privilege to use an application.

A role is created out of (one or more) system functions, called *access modules*.

An access module is a software unit, that targets a specific functional area in the Qmatic Orchestra system, e.g. *Users* module, which handles everything that has to do with user management. A module also works as a system privilege, so in order to use the module, one must have been granted access to the module; as part of a *role*.

Here is an example of how the system could be configured.

Table 1: Example Configuration - users and roles

User	Role	Access Module(s)	Application(s)
 Tom	Appointment Terminal	Appointment Appointment reception Connector Entry-Point	Appointment reception
 Jeff	AppointmentUser	Appointment	-
 Claire	BIUser	Default reports	Reports
 Ben	BranchManager	User Management	User Management

Table 1: Example Configuration - users and roles

User	Role	Access Module(s)	Application(s)
 Susan	Business Administrator	User Management Business Configuration Surface Editor Connector Management Information	User Management Business Configuration Surface Editor
 Sam	Calendar Admin	Appointment Calendar Admin Calendar	Calendar Admin Calendar Client
 Carol	Calendar Client	Appointment Calendar	Calendar Client
 Emily	ClientAdmin	Concierge User Management Business Configuration System Administration Surface Editor Context Marketing etc.	User Management System Administration Business Configuration etc.
 Jeeves	ConciergeAppointmentUser	Appointment Calendar Concierge Connector Service-Point	Connect Concierge Calendar
 James	ConciergeVisitUser	Concierge Connector Service-Point	Connect Concierge

Table 1: Example Configuration - users and roles

User	Role	Access Module(s)	Application(s)
 Anne	Connect-CounterUser	Connect Counter Connector Service-Point	Connect Counter
 Peter	CounterUser	Counter Connector Service-Point	Counter
 Janet	MarketingAdministration	Context Marketing	Context Marketing
 John	NotificationConnectorUser	Connector Notification	Notification Admin
 Jenny	ReceptionUser	Reception Connector Entry-Point	Reception
 Bill	System Administrator	Reception Counter User Management Business Configuration etc...	Reception Counter User Management Business Configuration etc...

Users

Qmatic Orchestra users are entered into the system, assigned suitable roles and given access to for example branches and Reports.

Users get access to the system by having one or several roles.

This is handled in the *User Management* application. When entering the application, a list of users is displayed:

Users

New User					
Name:					
Username	First name	Last name	Last login	Account status	Delete
calendar	Calendar	User	2018-03-20 17:48	☒	
conciergeoffice1	con	cierge		☒	
notification	Notification	User		☒	
reception	rec	eption		☒	
substitute	substitute	worker		☐	
superadmin	Super	Administrator	2018-03-21 08:47	☒	
workstation	workstation	user		☒	

Clicking a heading in the table, sorts the table on that heading.

Entering text in the search field, will search by *Username*, *First name*, or *Last name*, by default. To search based on role or branch name, change the setting in the drop-down list next to the search field.

The *Account status* column indicates whether the account is active or not. To change an account to be inactive, simply uncheck the check box on that user's row and confirm this in the popup. Similarly, to activate an account, check the check box and confirm it in the popup. If the check box for a user is greyed out, this means that the user cannot be activated, since it would break a license limit.

⚠ Users that have tried to log in too many times with a bad password will automatically be set as inactive. The system/user administrator will need to activate those users again to allow them to log in. This does not affect LDAP or SAML users.

When the system is started for the first time, there is a default user called Super Administrator, *superadmin*, available in the system. Additionally, two users, Calendar and Notification, are created automatically. These are used by their respective modules. It is not possible to delete, or deactivate any of these three users.

! Users that are not configured in Qmatic Orchestra, but who log in through LDAP/SAML will also be shown in the *Users* tab after they have been synchronized to central. These users cannot, however, be managed in the user list, except for activating/deactivating them.

Create new user and edit user

To edit a user, click on the applicable line in the list of users. To create a new user, click the *New User* button. The following window is displayed:

Create user

The 'Create user' form contains the following sections and fields:

- Log in:**
 - Username (mandatory, yellow)
 - Password (mandatory, yellow)
 - Repeat password (mandatory, yellow)
 - Login code (mandatory, yellow) with a 'Generate login code' button
 - Account status: ☒ Active, ☐ Password never expires
- Profile:**
 - First name (mandatory, yellow)
 - Last name (mandatory, yellow)
 - Language: Use Default (English) (dropdown)
 - Email (mandatory, yellow)
 - Phone (mandatory, yellow)
- Roles (mandatory):**
 - ☐ Appointment Booking
 - ☐ Appointment Terminal
 - ☐ AppointmentUser
 - ☐ BIUser
 - ☐ BranchManager
 - ☐ BusinessAdministrator
 - ☐ Calendar Admin
 - ☐ Calendar Client
 - ☐ ConciergeAppointmentUser
 - ☐ ConciergeVisitUser
 - ☐ ConnectUser
 - ☐ CounterUser
 - ☐ HardwareMonitoringUser
 - ☐ MarketingAdministration
 - ☐ NotificationConnectorUser
 - ☐ NotificationRestClient
 - ☐ Personal Data
 - ☐ ReceptionUser
 - ☐ SystemAdministrator
- Branches (mandatory):**
 - Give access by: REGIONS (dropdown)
 - ☒ Branch hierarchy
 - ☐ REGIONS (Groups: 0 / Branches: 6)

Note that all the mandatory fields are marked with yellow.

! For LDAP users, the fields are not editable, the role and branch access granted through LDAP will be shown, but it cannot be changed. Only the active/inactive status (*Account status*) can be changed.

A user has the following *Login* properties:

Username

Username of the user. Only a-z and 0-9, minimum 4 characters.

! Changing the *Username* of an existing user is not supported!

! If you want to use your native (for example Arabic, or Cyrillic) characters, instead of a-z, you need to update the *userName Validation Pattern* parameter in the *System Administration* application. For more information, see the Reference Manual, found on Qmatic World.

Password / Repeat password

Enter the password, then repeat the password in the next field.

❗ If you want to use your native (for example Arabic, or Cyrillic) characters, instead of a-z, you need to update the *PasswordValidation Pattern* parameter in the *System Administration* application. For more information, see the Reference Manual, found on Qmatic World.

❗ When changing a password, it will take around 1 minute before the new password takes effect.

Login code

The login code is the code for logging in to a KT type terminal. Either enter a wanted login code, or automatically generate one, by clicking on the *Generate login code* button

Account status

Check the check box if the account should be active. For more information, see “Activating a user” on page 42.

Password never expires

Check the check box if you don’t want the password for this user to expire.

Integration user

Check the box if the user is to be used for integrating towards Orchestra using API calls.

Such users should only be given access to the necessary APIs through a suitable role, and will normally not count towards the total number of licensed users in the system.

❗ Only the superadmin user and users with the Client Admin role can administer this setting.

Profile properties

First name - User’s first name

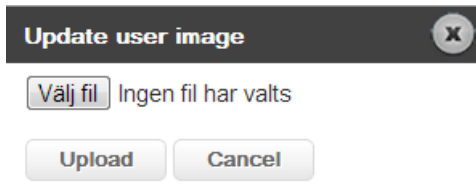
Last name - User’s last name

Language - From the drop-down list, select the language that this user should use. This information is mandatory.

Email - User’s email address

Phone - User’s phone number

To upload an image of the user, click the *Update user image* link. The following window is opened:



Possible image formats are jpg, gif, bmp and png.

When an image has been uploaded, it is also possible to remove the image, by clicking the *Remove image* link.

In the *Roles* section, select the role(s) that the user should have, simply by checking the applicable check box(es). This choice is mandatory.

ⓘ Some roles might not be selectable and be greyed out. This is since they are already at license limit.

In the *Branches* section, select the branch(es) that should be connected to the user.

When done, click the *Save* button to save the user information.

Activating a user

A user will get locked out of the system after a number of failed log in attempts (the default value is 5 and it is configured in the *System Administration* application).

For most users, the procedure is simply that the *superadmin* user, or another user with the *User Management* Access Module, sets the user to *Active*, in the *User Management* application, in the *Users* tab.

If the *superadmin* user, however, is locked out, the procedure is as follows:

Windows

1. Using PowerShell 3 (Windows Server 2012, and later), set the following:

```
PS H:\> get-executionpolicy
```

The policy should be

Unrestricted

If incorrect, use:

```
PS H:\> set-executionpolicy unrestricted
```

2. Once the execution policy is set to unrestricted, open the `<Orchestra install dir>/bin` folder and run the script `activate_user_and_set_password.ps1`, by right clicking and selecting *Run with PowerShell*.

ⓘ Once the script is run we recommend setting the execution policy to the same policy as before, in PowerShell.

Linux:

1. Open the `<Orchestra install dir>/bin` folder and run the shell script `activate_user_and_set_password.sh`, by invoking it from a shell.

ⓘ Both scripts will prompt for the *Username* of the user to be activated (in this case *superadmin*), as well as a new password to be valid for the user.

Roles

Roles are created out of one or more system functions, called Modules. It is by having specific roles in the system that users get access to system functions.

Modules are high level functions constructed out of basic system functions. The set of Modules in a system determines all the functionality of the system.

Roles are created by selecting one or more Modules.

In the User Management application, click the *Roles* link, to open the list of available roles:

Roles

New role q			
Name	Description	Access Modules	Delete
Appointment Booking	Default role. Access to appointment booking, calendar and service point connector	Appointment Booking Calendar Connector ServicePoint	
Appointment Terminal	Appointment terminal role	Appointment Appointment reception Connector EntryPoint	
AppointmentUser	Default Calendar role. Can access the Appointment Connector on accessible branches	Appointment	
BIUser	Default role. Can run all Business Intelligence report types on accessible branches.	Analysis Business Intelligence Dashboard ...and 2 more	
BranchManager	Default role. Can add, delete and modify users on accessible branches.	User Management	
BusinessAdministrator	Default role. Full access to manage branches.	User Management Business Configuration Surface Editor ...and 1 more	
Calendar Admin	Calendar administrator role	Appointment Calendar Admin Calendar	
Calendar Client	Calendar client role	Appointment Calendar	
ConciergeAppointmentUser	Default role. Can run Connect Concierge with appointment and visit work flows on assigned branches.	Appointment Calendar Concierge ...and 2 more	
ConciergeVisitUser	Default role. Can run Connect Concierge with visit work flow on assigned branches.	Concierge Connector ManagementInformation Connector ServicePoint	
ConnectUser	Default role. Can run Connect on assigned branches	Connect Connector ServicePoint	
CounterUser	Default role. Can run default workstation terminal on assigned branches	Counter Connector ServicePoint	
HardwareMonitoringUser	Default role. Can view Hardware Report	Analysis Business Intelligence Dashboard ...and 1 more	
MarketingAdministration	Default role created at installation.	Context Marketing	
NotificationConnectorUser	Default role. Can run notification rest services on assigned branches	Connector Notification	
NotificationRestClient	Notification user which have permission to get data to notification module from rest locations	Appointment Calendar Admin Calendar ...and 4 more	
Personal Data	Default role. Access to personal data	Personal Data	
ReceptionUser	Default role. Can run reception GUI on accessible branches.	Reception Connector EntryPoint	
SystemAdministrator	Default role. Full access in all applications	Counter Reception User Management ...and 30 more	

Clicking a heading in the table, sorts the table on that heading.

Entering text in the search field, selects those lines in the table that contain the search text anywhere on the line.

Click the Delete icon to remove a role.

Create new role and edit role

Clicking *New role* or clicking a role in the list opens the same page:

Create role

Name

The name of the role.

Description

A short description of the role.

Access Modules

Select the modules that should belong to the role, by checking the applicable check boxes.

⚠ It might not be possible to select all modules, if they are already at license limit.

When done, click the **Save** button to save the role information.

ⓘ Please note that if an Access Module check box looks like this: , as for example the User Management Access Module for the Branch Manager Role, this means that only parts of the Module are granted access to.

Show / Hide users assigned to this role

Click this link to hide/show a list of users assigned to this role.

Create a new Application Role

ⓘ This procedure is only possible if you log in as the Super Administrator, *superadmin*, user.

In order to let a user access a certain application, create a new role, as described above and make sure that you check both the wanted Access Module *and* the connectors (found at the bottom of the Access Module list) that the application requires. Then, assign the new role to the user.

Access Modules

An Access Module is a joint set of functionality. An Access Module can be licensed, e.g. Workstation. An Access Module can also contain items that can be separately access controlled, i.e. the Statistics Access Module.

Privilege levels

Users in Qmatic Orchestra have non-visible privilege levels.

A user is not able to perform any actions on a user that has the same or higher privilege level than the user in question. In the same way, a user is not able to perform any actions (edit, remove, assign) on a role or module with the same or higher level than that of the user in question.

Example:

A system administrator can not:

- Add super administrator privilege to himself
- Assign a system administrator role to a colleague
- Create a role with the system Administrator Module
- Remove the system administrator role from another user.
- Remove the system administrator role from himself.

Branch Agnosticism

By default, Qmatic Orchestra is set up so that if a user is assigned an application that is Branch agnostic, the user will see *all* Branches, even if all the other assigned applications are Branch aware.

So, for example, if the user has access to *both* the Counter Workstation (Branch aware) *and* the Central Operations Panel (Branch agnostic), the user will see all available Branches in the Counter Workstation.

If you want to change this default behavior, you need to set the *branch_app* variable to *true/false* for the used application(s), in the applications table, accordingly.

Branch agnostic roles

- MarketingAdministration
- BusinessAdministration
- Calendar Admin
- Personal Data
- SystemAdministrator
- NotificationRestClient

LDAP setup

❗ In order to be able to use LDAP, the *Enabled* parameter check box must be checked in the *LDAP Settings* section of the *Parameters* page in the *System Administration* application.

Qmatic Orchestra has support for managing its users from an LDAP server, the Microsoft Active Directory Server.

To use the MS Active Directory for Qmatic Orchestra, you need to complete of the following steps:

1. Set up security groups and group members in Active Directory.
2. Set up Active Directory connection and user data fields in Qmatic Orchestra.
3. Map Active Directory groups to Qmatic Orchestra objects (roles, branch groups and branches).

Active Directory Security Groups

The Active Directory must be set up to differentiate users for the two permission categories, by defining the appropriate Active Directory Security Groups for each category.

For each role, branch and branch group in Qmatic Orchestra, create a corresponding Active Directory Security Group, preferably by prefixing the group name with QM.

For example:

Qmatic Orchestra role “Branch Admin” will have a corresponding Active Directory group “QMBranchManager”.

LDAP / Active Directory Server Configuration

For more information about this, please see the System Administration chapter in the Reference Manual.

Map of Active Directory Groups to Qmatic Orchestra objects (Roles, Branch Groups and Branches)

In a Windows domain managed by Active Directory, the permissions (the access rights) of a user are based on what groups that specific user belongs to. For example, the staff group has some permissions and the admin group has another set of permissions.

In Qmatic Orchestra, there are three kinds of user permissions that has to be defined in the Active Directory:

1. *Roles*: Qmatic Orchestra uses Roles for defining permissions in the Qmatic Orchestra applications.
2. *Branches*: Qmatic Orchestra has many Branches, where each Branch should be separated from the others when it comes to permissions.
3. *Branch Groups*. In Qmatic Orchestra, one or more Branches are grouped together into Branch Groups, which should have different permissions.

In order to access the Active Directory, Qmatic Orchestra requires a so-called *bind user*. The bind user is an Active Directory user with the ability to search both the user tree and role tree for users and roles.

Qmatic Orchestra will require the *login name* and the *domain* of this user, that is the LDAP field *userPrincipalName*.

Example: *qmorchestra@somedomain.com*.

ⓘ Note that in most Active Directory set-ups, the Role tree and the User tree are located in the same Branch.

In the *User Management* application, open the *IdP Mappings* tab. To create a new mapping, click the *Create New Mapping* button.

LDAP / SAML

Name	Type	Mapping
	Role	...

Name

Name of the Active Directory group that should be mapped.

Type

From the drop-down list, select the wanted type of mapping. The available choices are: *Role*, *Branch* or *Branch Group*.

Mapping

Depending on what choice you made under *Type*, the available Roles, Branches or Branch Groups are available in this drop-down list.

When done, click the *Save* button.

Login with LDAP Users

Once a user logs in using LDAP, that user will be synchronized to central, stored in the users table and be visible on the regular user list.

If such a user has been marked as inactive in the *User* tab (or if a database user with the same user name exists and is inactive), the LDAP user will not be able to log in.

Additionally, if an LDAP user logs in and the user has role mappings to roles in the system that have reached the license limit, the user will only be granted access to those modules that the user has previously had and any new roles that have not reached the license limit.

If the total number of users in the system is reached, and the LDAP user has not previously logged in, the user cannot log in.

Login LDAP user with PIN-code on a workstation terminal

If you have added a PIN-code for use with a to a user in the LDAP server, that user must log in to Orchestra with LDAP to synchronize the PIN-code with the LDAP server before using the PIN-code on the workstation terminal.

❗ Create unique PIN-codes for each user. If a user logs in with the same PIN-code as another user, both users will be disabled. A new user who logs in with the same PIN-code as another user will not be created, and the existing user with the same PIN-code will be disabled.

Set language and text direction for LDAP users

To make Qmatic Orchestra get the preferred language of an LDAP user from the LDAP server, follow the procedure below.

To set up a language for an LDAP user on an Active Directory server, you use the LDAP field *preferredLanguage*. This field is not available with the ordinary *Active Directory Users and Computers* editor. Instead, you have to use *adsiedit.msc* to edit the preferred language field.

See the Localisation chapter of the Reference Manual, found on Qmatic World, for information about language codes.

Enter the 2-character language code for the *preferredLanguage*, for example *ar* for Arabic.

You should also set a text direction (ltr or rtl).

SAML user management

This section describes gives an overview of user management with SAML.

With SAML, all users are managed and given access rights in an identity provider such as Azure AD or ADFS. For information about SAML and how to set it up SAML, see the SSO Setup section and Appendix E of the Reference Manual.

Once the identity provider (for example Microsoft ADFS) and Qmatic Orchestra have been configured to trust each other, and the attribute identifiers are set up to match, you need to creating mappings in Qmatic Orchestra for roles, branches and branch groups.

This is done in User Management > Idp Mappings. To create a new mapping, click the *Create New Mapping* button.

In the example below we have a role called orchestra-role-counter mapped to the Qmatic Orchestra ConterUser role. We also have a branch group mapping called all-orchestra-branches. These need to match with the names in the identity provider.

The screenshot shows the 'User Management' interface with tabs for 'Users', 'Roles', 'Idp Mappings', and 'Pre Authorization'. The 'Idp Mappings' tab is active, displaying a table of mappings. At the top of the tab are buttons for 'Save', 'Discard changes', and 'Create New Mapping'. The table has three columns: 'Name', 'Type', and 'Mapping'. There are two rows of mappings:

Name	Type	Mapping
orchestra-role-counter	Role	CounterUser
all-orchestra-branches	Branch Group	REGIONS

4. Business Configuration

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Introduction

This chapter describes the various procedures that need to be performed to set up your Business Configuration.

It covers everything from setting up your operation profile, including queuing profile and equipment profile, to creating branches, services and marks, and finally publishing the configuration.

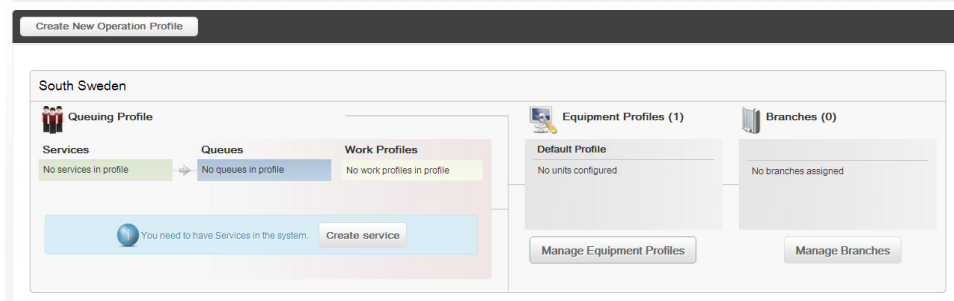
Operation Profiles Page

When navigating to the *Business Configuration* application, the first page that is displayed is the *Operation Profiles* page.

Here, all available operation profiles are listed.

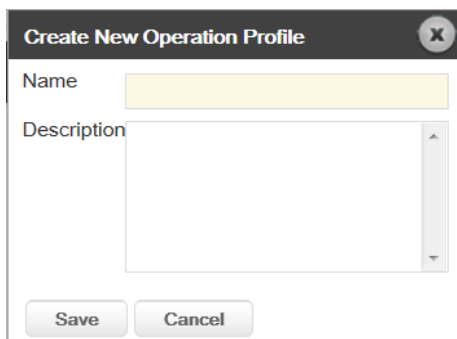
It is not possible to delete an operation profile, if only one exists, or if the operation profile has one or several branches assigned to it.

Operation Profiles



Creating and editing an operation profile

When you click *Create New Operation Profile*, the following window is displayed:

A screenshot of a 'Create New Operation Profile' dialog box. The dialog has a title bar with the text 'Create New Operation Profile' and a close button (X) on the right. Inside the dialog, there are two input fields: 'Name' with a yellow background and 'Description' with a white background and a vertical scrollbar. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

Name

The name of the operation profile is entered here. The name is mandatory and has to be unique.

Description

Optionally add a description of the operation profile.

When done, click *Save* and the operation profile is created.

When the operation profile is created, you can edit its name and description by clicking on the *edit* icon, , in the upper right corner of the operation profile.

Queuing Profile

⚠ Services must have been created before you can manage your queuing profile.

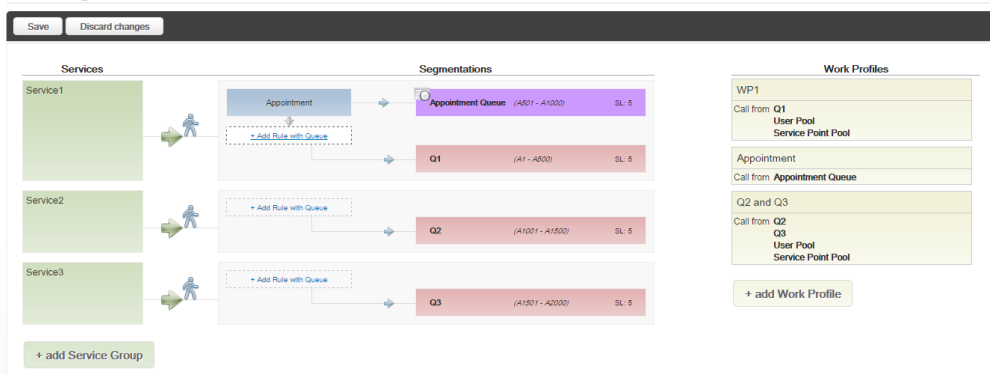
Each branch operation profile has one queuing profile. A queuing profile handles the queuing logic.

In a queuing profile the following is done:

- Services are selected and added to service groups which links them to a segmentation.
- Segmentation rules are defined to put visits into different queues.
- Queues are configured with for example a number sequence and a service level.
- Work profiles are set up, defining the conditions for in which order visits are called from queues are set up.

OP1

Queuing Profile

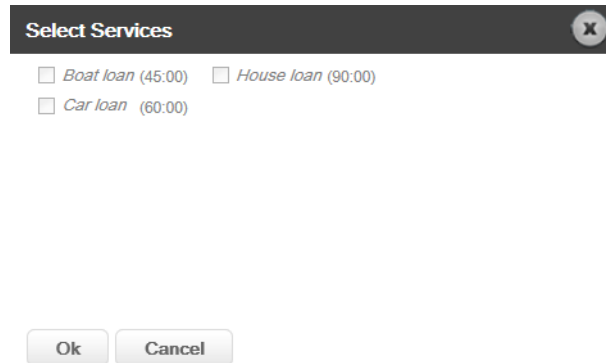


Service Groups

Services can be grouped together into service groups. A service can only be in one group. For each service group, a default queue is created automatically.

To create a service group, click *+Add Service Group*.

Select the service(s) for the queuing type:



Select Services

☐ Boat loan (45:00) ☐ House loan (90:00)

☐ Car loan (60:00)

Ok Cancel

Segmentation

In some cases you want to treat or serve your customers differently, depending on for example VIP levels or other customer categorisation. The system segregates the customers by putting them into different queues. By using different queues and number series, the customers will experience the waiting as fair.

The segmentation can be based on the following variables:

- Which service the customer has requested (segmented already in the service groups)
- The properties of the customer (such as VIP Level and language).
- If the visit is an appointment or not.

Segmentation rules

Segmentation rules identify the type of customer/visit and then select which queue this visit shall be placed into.

Each segmentation rule is connected to its own queue.

Segmentation rules are evaluated in the order they are entered. Once a Segmentation rule is true, the queue selection is finished and the rest of the Segmentation rules are not evaluated.

To add a Segmentation rule, click *Add Rule with Queue*.

Manage Segmentation

Name

Define rule

WHEN Where the VIP level in the visit is one of levels

[Collapse](#)

- ☒ VIP Level 1
- ☐ VIP Level 2
- ☐ VIP Level 3

AND

[+ Add condition](#)

THEN Go to assigned Queue

Enter the name for the segmentation rule, then define the rule.

The following rules are available:

- Where the language in the visit is set to <set value>.
 - Example: Where the language in the visit is set to German
- Where the gender in the visit is set to <set value>.
 - Example: Where the gender in the visit is set to Female
- Where the VIP level in the visit is one of the levels <set value>.
 - Example: Where the VIP level in the visit is one of the levels VIP Level 1.
- When the visit is an appointment.
- When the appointment is <set value> by over <set value> minutes.
 - Example: When the appointment is late by over 30 minutes.
- When the appointment is <set value> no more than <set value> minutes.
 - Example: When the appointment is early no more than 10 minutes.
- When the appointment is not <set value> by over <set value> minutes.
 - Example: When the appointment is not late by over 10 minutes.

Wherever <set value> is stated above, a value has to be configured by the user, as in the following example:

Define rule

WHEN Where the VIP level in the visit is one of levels [Collapse](#)

☒ VIP Level 1 

☐ VIP Level 2

☐ VIP Level 3

AND

Where the gender in the visit is set to [Collapse](#)

☐ Female 

☒ Male

AND

[+ Add condition](#)

THEN Go to assigned Queue

When done, click Ok and the rule is added.

Queues

Queue Details 

Name

Letter

Sequence -

Service Level *Minutes*

Type 

Name

Name of the queue.

Letter

Queue letters can be used to indicate that a ticket number belongs to a certain queue. The queue letter can be printed on the ticket and shown on the displays. Only alphanumeric characters are allowed.

Sequence

The number sequence that applies to the queue in question.

Service Level

The service level for waiting times is set to a queue and indicates the maximum time that it is OK to wait in a certain queue. It is used for warning systems (e.g. alerts to staff), work profiles (call the visit closest to service level) and reports.

ⓘ There is no service level set on a pool. Instead, a default value has been set to avoid that the system fails. The staff pool automatically gets a service level of 0 minutes and the counter pool automatically gets a service level of 1 minutes.

Type

From the drop-down list, select if the type of the queue is Normal or Appointment.

ⓘ This choice is only available if you have selected the Segmentation rules that implies that the visits in the queue are appointments.

Pools

Pools are similar to queues, but are used when customers need to be put on hold or parked. A customer may need to for example fill in a form and at the same time continue serving the next customer. The way to do that is to transfer the customer to the staff pool or counter pool. The customer can later be called automatically from a pool.

Pools can be connected to a work profile and thus follow the calling rule conditions, in the same way as regular queues.

ⓘ Note that it is not recommended to set Call by closest to service level as calling rule when using pools.

For more information, see "Work Profiles" on page 59.

Work Profiles

A work profile defines which queues or pools to call from and in what order. This is set up in the *Business Configuration* application, on the *Queuing Profile* page, in the *Manage Work Profile* window:

Manage Work Profile

Name

Loans

1. Select Queues and Pools to call from

☒ Q1

☐ Q2

☐ Service Point Pool

☒ User Pool

☒ Appointment Queue

2. Call by condition

Add Rule

3. Finally call by

WHEN No condition is valid.

THEN Call by defined order (Premium)

Appointment Queue

Q1

User Pool

AND Ignore primary resources

Ok

Cancel

To create a work profile, follow these steps:

1. Start by entering a name for the work profile.
2. Select which queues and/or pools to call from.
3. If several queues and/or pools have been selected, choose the default order to call by. For example “When no condition is valid, the call by max waiting time and ignore primary resources.” For more information about Calling Rules, see below.
4. Add conditions to the default call order. For more information about conditions, see below.

Calling Rules

A calling rule in a work profile is built on rules and conditions.

The most basic calling rule only calls from one queue or pool. However, more commonly, a calling rule can call from several queues or pools and can then be extended with a condition:

Call from Queue 1 except when "some condition". A condition could be "when waiting time in Queue 2 is above 20 minutes".

If a condition is added, a new rule must be added. An example could be:

"Call from Queue 1, except when waiting time in Queue 2 is above 20 minutes. Then, call from Queue 1 or Queue 2 with max waiting time".

ⓘ Queue agents need to be upgraded to 7.2 or later if any of the calling rule options related to Qmatic Cloud Appointments are used. For more information, see Release Notes.

ⓘ Queue agents need to be upgraded to 7.4 update 6 or later if any of the calling rule options related to unserved services are used. For more information, see Release Notes.

The following calling rules are available:

Call from selected queue/pool

This rule only calls from *one* queue or pool.

Call from queues/pools in defined order

This rule will call from multiple queues/pools in a defined order. It will call from the first queue/pool until it is empty and then call from the next queue/pool, and so on. For this rule, Journey Manager Premium license is required.

Call from queues based on max waiting time

This rule will call from multiple queues/pools and pick the queue/pool with the longest waiting time. For this rule, Journey Manager Entry license is required.

Call from queues based on max visit lifetime

This rule will call from multiple queues/pools and pick the queue/pool with the longest visit lifetime. For this rule, Journey Manager Entry license is required.

Call from queues/pools based on service level

This rule will call from multiple queues/pools and pick the queue/pool with the first visit closest to the service level. For this rule, Journey Manager Standard license required.

E.g. If there are two queues/pools and the first queue/pool has the service level set to 10 minutes and the second has the service level set to 20 minutes. If the first visit in both queues/pools has been waiting for 5 minutes, the visit in Queue 1/Pool 1 has 5 minutes left to the service level while the visit in Queue 2/Pool 2 has 15 minutes left. The visit in Queue 1/Pool 1 will be called first.

ⓘ There is no service level set on a pool. Instead, a default value has been set to avoid that system fails. The staff pool automatically gets a service level of 0 and the counter pool automatically gets a service level of 1. Therefore the calling rule *Call by closest to service level* is not recommended when using pools.

Do not call visit

This rule will cause visits not to be called from the selected queues or pools. It can be used for example when you only want to call visits with a primary resources (i.e. appointments booked for a specific staff member)

Conditions

ⓘ It is highly recommended that you do not have a mix of conditions in the same work profile.

ⓘ Queue agents need to be upgraded to 7.2 or later if any of the conditions related to Qmatic Cloud Appointments are used. For more information, see Release Notes.

ⓘ Queue agents need to be upgraded to 7.4 update 6 or later if any of the calling rule options related to unserved services are used. For more information, see Release Notes.

Wherever <set value> is stated, a value has to be configured by the user.

The following default conditions are available:

- When waiting time in <set value> is above <set value> minutes.
Example: "When waiting time in Loans is above 10 minutes."
- When waiting time in <set value> is <set value> minutes above the service level.
Example: "When waiting time in Loans is 5 minutes above the service level."
- When time of day is between <set value> and <set value>.
Example: "When time of day is between 13:00 and 15:00."
- When number of visits in <set value> <set value> <set value>.
Example: "When number of visits in Loans is > 15"
- When called <set value> <set value> visits from <set value> per branch.
Example: "When called < 2 Visits from Platinum per branch."
For a more detailed example of this condition, please see "Calling rule conditions - detailed branch example" on page 67.
- When called <set value> <set value> visits from <set value> for this work profile.
Example: "When called > 2 Visits from Platinum for this work profile."

For a more detailed example of this condition, please see "Calling rule conditions - detailed work profile example" on page 70.

- When called <set value> <set value> visits from <set value> for the calling user.

Example: "When called < 5 visits from Queue 1 for the calling user."

For a more detailed example of this condition, please see "Calling Rule Conditions - detailed user example" on page 72.

❗ The Queue Agent calling history for a branch/work profile/user is reset each time a visit is called by the "Finally call by" section in any of the work profiles.

- When calling user is primary resource for visit in <set value>.

Example: "When calling user is primary resource for visit in Queue 1".

- When visit in <set value> has no primary resource.

Example: "When visit in Queue 1 has no primary resource".

- When visit in <set value> has unserved services for <set value>

Example: "When visit in Queue 1, Queue 2 has unserved services for Service A, Service B.

For a more detailed example of this condition, please see "Calling Rule Conditions - detailed user example" on page 74.

Primary resources handling

In the configuration of the calling rules, you also need to set how to handle primary resources. The following options are available:

- Both with and without primary resources - only the calling staff member's visits, or visits where it's not specified who the customer should meet, are called
- Without primary resources - only visits where it's not specified who the customer should meet are called
- Ignore primary resources - calls visits without looking at primary resources
- With primary resources - only the calling staff member's visits are called.

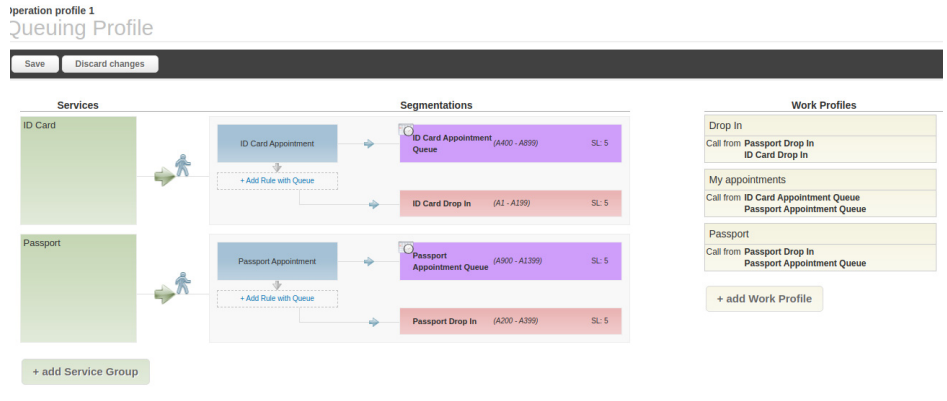
❗ Make sure you select an option that is compatible with the condition you have chosen.

❗ If you are not using Qmatic Cloud Appointments and appointments with a primary resource, always set this configuration to *Ignore primary resource*.

Qmatic Cloud Appointment - work profile examples

With Qmatic Cloud Appointments, appointments can be booked for a specific staff member. The staff member is then the primary resource for the appointment. The work profiles can be set up to take primary resources into account.

Let's look at an example where the queuing profile is set up like this:



There are two services, ID Card and Passports, which are available both as appointments and drop-in visits. Also, three work profiles are connected to this queuing profile - Drop In, My appointments and Passport.

The first work profile is for drop in visits:

Manage Work Profile

Name: Drop In

1. Select Queues and Pools to call from

☒ ID Card Drop In
 ☐ ID Card Appointment Queue
 ☒ Passport Drop In
 ☐ Passport Appointment Queue

☐ Service Point Pool
 ☐ User Pool

2. Call by condition (Standard and Premium only)

Add Rule

3. Finally call by

WHEN No condition is valid.
 THEN Call by max waiting time (Entry) Passport Drop In
 AND Ignore primary resources ID Card Drop In

Ok Cancel

- This work profile will call visits by maximum waiting time from both drop-in queues and ignore primary resources.

The second work profile is an example where you only want to call appointment visits where the calling user is the primary resource:

Manage Work Profile

Name: **My appointments**

1. Select Queues and Pools to call from

☐ ID Card Drop In
 ☒ ID Card Appointment Queue
 ☐ Passport Drop In
 ☒ Passport Appointment Queue

☐ Service Point Pool
 ☐ User Pool

2. Call by condition (Standard and Premium only)

WHEN When calling user is primary resource for visit in ID Card Appointment Queue, Passport Appointment Queue .
 AND
 + Add condition

THEN Call by closest to service level (Standard)

AND With primary resource

Add Rule

3. Finally call by

WHEN No condition is valid.

THEN Do not call visit

AND Ignore primary resources

Ok Cancel

- The first condition in this work profile means that if there are visits in any of the appointment queues with the calling user as primary resource, those visits will be called by closest to service level.
- If the first condition is false, no other visits are called.

The third work profile is an example when you want to call all passport visits, but prioritize appointments:

Manage Work Profile

Name Passport

1. Select Queues and Pools to call from

☐ ID Card Drop In
 ☐ ID Card Appointment Queue
 ☒ Passport Drop In
 ☒ Passport Appointment Queue

☐ Service Point Pool
 ☐ User Pool

2. Call by condition (Standard and Premium only)

WHEN

When calling user is primary resource for visit in Passport Appointment Queue .

AND

+ Add condition

THEN

Call from selected queue

Passport Appointment Queue

Edit selection

AND

With primary resource

WHEN

When visit in Passport Appointment Queue has no primary resource.

AND

+ Add condition

THEN

Call from selected queue

Passport Appointment Queue

Edit selection

AND

Without primary resource

Add Rule

3. Finally call by

WHEN

No condition is valid.

THEN

Call by max waiting time (Entry)

Passport Drop In

Passport Appointment Queue

AND

Both with and without primary resource

Ok

Cancel

- First, passport appointments where the calling user is the primary resource are called.
- If there are no visits in that category, then passport appointments without a primary resource are called
- Lastly, also drop-in visits for passports are called.

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Calling rule conditions - detailed branch example

Let's say that you have a business where your customers are divided into three categories: Platinum, Gold and Silver. These categories are mapped to a queue each.

You could then set up your work profile in the following way:

The screenshot shows the 'Manage Work Profile' dialog box. At the top, the 'Name' field is set to 'Example'. Below this, there are three rule configurations:

- Rule 1 (Platinum):** WHEN called < 2 visits from Platinum per Branch AND + Add condition THEN Call from selected queue (dropdown) Platinum Edit selection
- Rule 2 (Gold):** WHEN called < 1 visits from Gold per Branch AND + Add condition THEN Call from selected queue (dropdown) Gold Edit selection
- Rule 3 (Silver):** 3. Finally call by WHEN No condition is valid. THEN Call by defined order (Premium) (dropdown) Silver, Platinum, Gold

At the bottom of the dialog, there are 'Ok' and 'Cancel' buttons. An 'Add Rule' button is located between the first two rule configurations.

This means that first the platinum condition should be checked:

- If there are visits in Queue Platinum, and less than 2 visits have been called from Queue Platinum, since the visit counters were reset, a visit should be called from platinum.

If, however, the Platinum condition is false, the Gold condition should be checked:

- If there are visits in Queue Gold, and less than 1 visits have been called from Queue Gold, since the visit counters were reset, call a visit from Queue Gold.

If both the Platinum and Gold conditions are false:

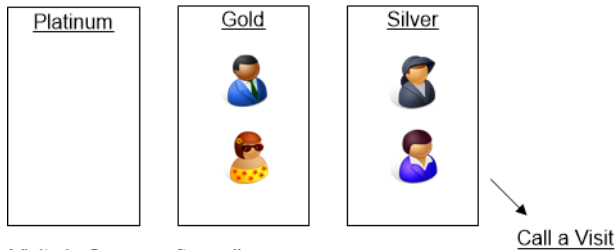
- Call first from the Silver Queue. If Silver is empty, start over from the beginning of the conditions, calling from Queue Platinum (with the visit counter set to one for Platinum), and so on.

If there are visits in all queues, this would mean that they would be called in the following order: Platinum, Platinum, Gold Silver, Platinum, Platinum, Gold, Silver, etc.

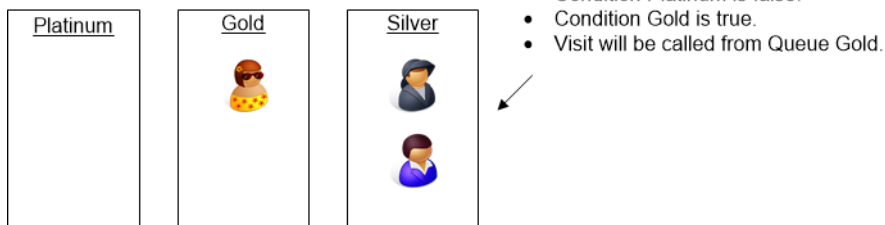
This example is illustrated in the images below.

Step 1:

Start scenario in Queues:

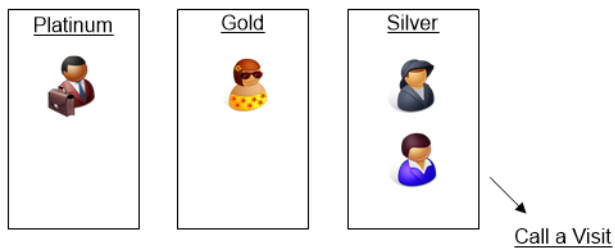


Visits in Queues after call:

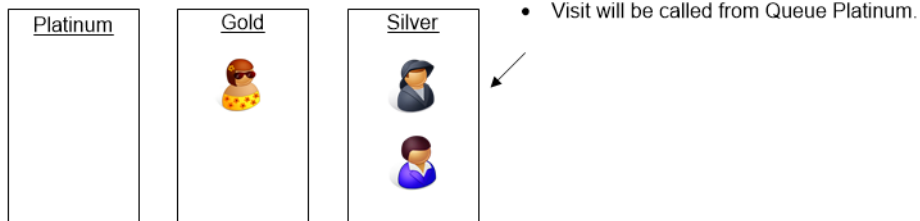


Step 2:

Start scenario in Queues (Visit added to Platinum):

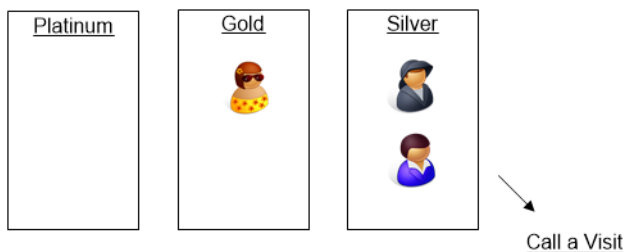


Visits in Queues after call:

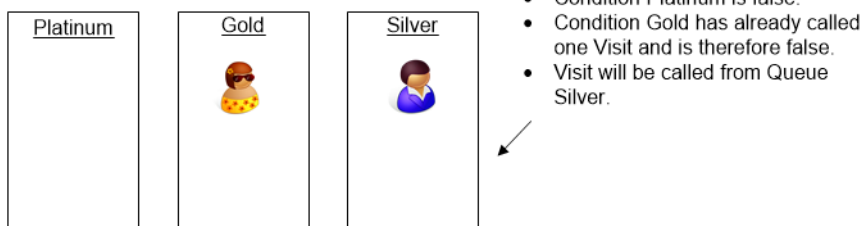


Step 3:

Start scenario in Queues:



Visits in Queues after call:



⚠ The visit counters will be reset as soon as anybody at the branch reached the "Finally call by..." part of the work profile, i.e the end of any work profile for that branch. Thus, this scenario will not work if you are using more than one work profile in a branch.

Calling rule conditions - detailed work profile example

Let's say that you have a business where your customers are divided into two categories: Platinum, and Gold. These categories are mapped to a queue each.

You could then, for example, set up your work profile in the following way:

Manage Work Profile

Name:

— 1. Select Queues and Pools to call from —

☒ Platinum
 ☒ Gold
 ☐ Silver
 ☐ Service Point Pool
 ☐ User Pool

— 2. Call by condition —

WHEN called < 3 visits from Platinum for this work profile
AND
 + Add condition
THEN [Edit selection](#)

WHEN called < 3 visits from Gold for this work profile
AND
 + Add condition
THEN [Edit selection](#)

[Add Rule](#)

— 3. Finally call by —

WHEN No condition is valid.
THEN

This means that first the platinum condition should be checked:

- If there are visits in the platinum queue, and less than 3 visits have been called from that queue, by the same work profile, since the work profile visit counters were reset, a visit should be called from platinum.

If, however, the Platinum condition is false, the Gold condition should be checked:

- If there are visits in the Gold Queue, and less than 3 visits have been called from that queue, by the same work profile, since the visit counters were reset, call a visit from Gold.

Finally, if both the Platinum and Gold conditions are false:

- Call first from the Platinum Queue, then start over from the beginning of the conditions, the visit counter will be set to one, for Platinum.

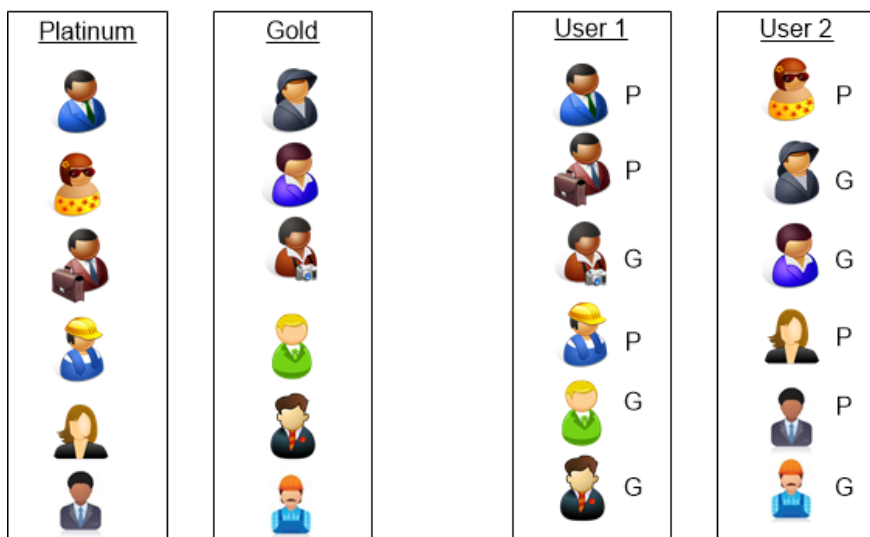
If there are visits in both queues, this would mean that they would be called in the following order: Platinum, Platinum, Platinum, Gold, Gold, Gold, Platinum, Platinum, Platinum, etc.

This is illustrated in the image below:

Calling Visits

Three people will be called from Platinum (P), then three from Gold (G), and so on. These could be called by different Users, belonging to the same Work Profile, meaning that the order that the Customers are called could therefore look like this:

Start scenario in Queues:



Calling Rule Conditions - detailed user example

Let's say that you have a business where your customers are divided into two categories: Platinum, and Gold. These categories are mapped to a queue each.

You could then, for example, set up your work profile in the following way:

Manage Work Profile

Name

1. Select Queues and Pools to call from

☒ Platinum ☒ Gold ☐ Silver ☐ Service Point Pool

☐ User Pool

2. Call by condition

WHEN called < 3 visits from Platinum for the calling user
AND
 + Add condition

THEN [Edit selection](#)

WHEN called < 3 visits from Gold for the calling user
AND
 + Add condition

THEN [Edit selection](#)

[Add Rule](#)

3. Finally call by

WHEN No condition is valid.

THEN

This means that first the Platinum condition should be checked:

- If there are visits in the Platinum Queue, and less than 3 visits have been called from that queue, by the same user, since the visit counters were reset for that user, a visit should be called from Platinum.

If, however, the Platinum condition is false, the Gold condition should be checked:

- If there are visits in the Gold Queue, and less than 3 visits have been called from that queue, by the same user, since the visit counters were reset for that user, call a visit from Gold.

Finally, if both the Platinum and Gold conditions are false:

- Call first from the Platinum Queue, then start over from the beginning of the conditions, with the visit counter set to one for Platinum.

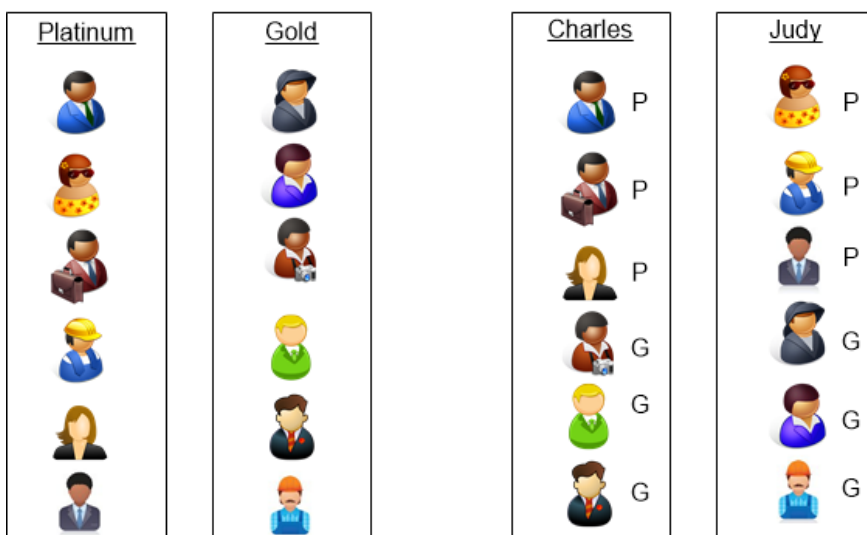
If there are visits in both queues, this would mean that they would be called in the following order: Platinum, Platinum, Platinum, Gold, Gold, Gold, Platinum, Platinum, Platinum, etc.

This is illustrated in the image below:

Calling Visits

Three people will be called from Platinum (P), then three from Gold (G), and so on. These will be called by different Users, independantly of each other, so the order that the Customers are called would therefore look like this:

Start scenario in Queues:



Calling Rule Conditions - detailed user example

Let's say that you have a business where your customers that need several services per visit, for example to get different building plans approved. You have services for electrical and plumbing review, and each staff member is specialized in providing one (or more) of these services. You could, in this case, set up a work profile like this:

Manage Work Profile

Name

1. Select Queues and Pools to call from

☒ Common Queue
 ☐ Service Point Pool
 ☐ User Pool

2. Call by condition (Standard and Premium only)

WHEN

When visit in Common Queue has unserved services for Electrical review.

AND

[+ Add condition](#)

THEN

Call from selected queue

Common Queue

[Edit selection](#)

AND

Ignore primary resources

Add Rule

3. Finally call by

WHEN

No condition is valid.

THEN

Do not call visit

Common Queue

AND

Ignore primary resources

Ok

Cancel

In this case In this case, a user that has the "Electrical" work profile will only call visits that have the "Electrical review" either as the service they are currently queuing for, or in the unserved services list.

Similarly, you could create a work profile "Plumbing" that only calls visits that have "Plumbing review" as a remaining service.

For staff that are capable of serving both you would specify both "Plumbing" and "Electrical" review in the condition logic.

If the customer is currently queuing for a different service (e.g. "Plumbing review") than the one(s) specified in the rule condition, the calling logic will swap those

services so the user will be called for e.g. "Electrical review" and when that service is finished they will be put back in queue and wait for "Plumbing review".

Generally you would want to set the "3. Finally call by" rule to "Do not call visit" as otherwise you will call the first user in queue regardless of which service they are queuing for (which is the default behavior for all calling rules).

IF you specify the "... has unserved services for..." in a rule condition, only visits that have such a service (or services) remaining will be called.

You can specify multiple rules (using ...AND...), in this case the logic will be that only the intersection of those services will be used (i.e. only services that exists in ALL conditions).

Equipment Profile

When navigating to the *Equipment Profile* page, all Equipment Profiles of the selected branch Operation Profile are listed.

It is not possible to delete an Equipment Profile, if there is only one available.

When the system is started the first time, a Default Profile is available.

Creating and editing an Equipment Profile

By clicking on the *Create Additional Profile* button, a page will be opened, where an additional Profile can be created. To edit an existing profile, simply click on it.

Name

The name of the Equipment Profile is entered here. The name is mandatory and has to be unique.

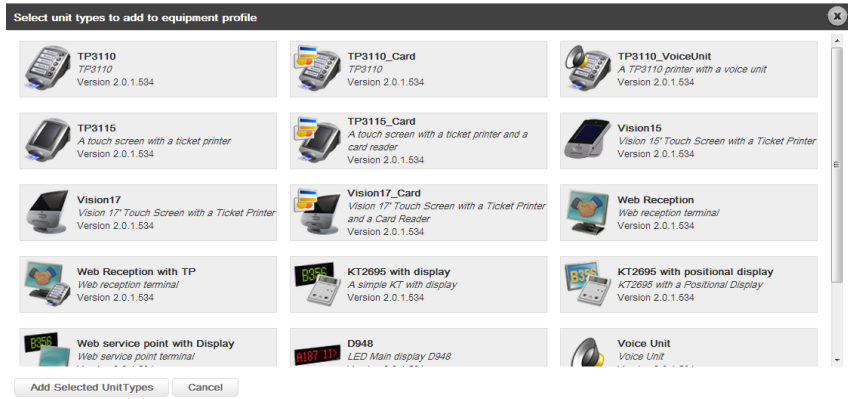
Description

Optionally add a description of the Equipment Profile here.

To add a Unit to your Equipment Profile, in the Business Configuration application:

1. Click the *Add Unit* button.

2. The *Select Unit types to add to equipment profile* window will be opened:



The contents of the window depends on which units have been created in the *System Administration* application.

3. Select the Unit that you want to add from the list and click *Add Selected Unit Types*.

Unit Types

The following Unit Types are available:

- Entry Points.
- Service Points.
- Presentation Points.
- Device Controllers.
- Detection Points.
- Custom Unit Templates.

All the Standard Unit Types are described in detail in the Standard Unit Types Guide.

Unit Types are created in the System Administration application. For more information, see the Reference Manual.

Reset Functionality

The Reset functionality makes it possible to make sure that all queues start from scratch again, after a specified time each 24-hour period.

❗ Call history in widgets and surface applications are not affected by the Reset functionality.

The Reset functionality is applied by setting a *Reset time*, in the *Create New Branch* window.

See Q:\Manual\Current\212 Orchestra Admin Guide R6_in Orchestra\212 Orch_EV_Admin\09_01 system_configuration.fm09_01 system_configuration.fm for more information.

When the reset occurs, all active Customer Journey Management sessions are ended as well as all Visits with a history (i.e. all Visits that have been called at least once). Visits without a history, however, are deleted.

All queues are emptied and the current number for the next ticket is set to the start number of that queue.

Branches

Branches are the physical location where service is provided to customers or visitors.

Branches are managed in *Business Configuration > Branches*.

Branches

Branch Group

Operation Profile

Equipment Profile

Config Status

Clear filters

Showing 35 of 35 branches

0 selected

⌵ Show selected only

Validate

Publish selected

Schedule publish

☐	Branch	Prefix	Id	Branch Group	S. Agent	Operation Profile	Equipment Profile	Config Status	Scheduled	Published	Deployed	Latest edit	Action
☐	LoadBranch3000	AA0	1		C. Central	Operation profile 1	Default Profile	Branch disabled				2 weeks ago	
☐	LoadBranch3001	AA1	2	REGIONS / North	C. Central	Operation profile 1	Default Profile	✓	2024-10-12 20:30	2024-10-11 08:19:28	2024-10-15 08:13:05	2 weeks ago	
☐	LoadBranch3002	AA2	3		C. Central	Operation profile 1	Default Profile	✓	2024-10-12 20:30	2024-10-11 08:19:29	2024-10-15 08:13:05	2 weeks ago	
☐	LoadBranch3003	AA3	4	REGIONS / North	C. Central	Operation profile 1	Default Profile	✓		2024-10-11 08:19:28	2024-10-15 08:13:05	2 weeks ago	
☐	LoadBranch3004	AA4	5	REGIONS	C. Central	Operation profile 1	Default Profile	✓		2024-10-11 08:19:29	2024-10-15 08:13:05	2 weeks ago	
☐	LoadBranch3005	AA5	6	REGIONS	C. Central	Operation profile 1	Default Profile	⚠ Publish needed				2 weeks ago	
☐	LoadBranch3006	AA6	7	REGIONS	C. Central	Operation profile 1	Default Profile	⚠ Publish needed				2 weeks ago	
☐	LoadBranch3007	AA7	8	REGIONS / South	C. Central	Operation profile 1	Default Profile	⚠ Validation failed				2 weeks ago	
☐	LoadBranch3008	AA8	9	REGIONS / South	C. Central	Operation profile 1	Default Profile	⚠ Publish needed				2 weeks ago	
☐	LoadBranch3009	AA9	10		C. Central	Operation profile 1	Default Profile	⚠ Publish needed				2 weeks ago	
☐	LoadBranch4000	CA0	31	REGIONS / South	d. asagad	Operation profile 1	Additional Equipment Pro...	⚠ Publish needed				3 days ago	
☐	LoadBranch4001	CA1	32	REGIONS / North (+1)	d. asagad	Operation profile 1	Additional Equipment Pro...	✓	2024-09-25 15:53:16	2024-09-26 13:45:07		2 weeks ago	
☐	LoadBranch4002	CA2	33	REGIONS / South	d. asagad	Operation profile 1	Additional Equipment Pro...	⚠ Publishing...	2024-10-11 08:18:25			2 weeks ago	
☐	LoadBranch4003	CA3	34	REGIONS / North	d. asagad	Operation profile 1	Additional Equipment Pro...	⚠ Publish needed	2024-09-26 13:46:27	2024-09-26 13:46:28		3 days ago	
☐	LoadBranch4004	CA4	35	REGIONS / North (+1)	d. asagad	Operation profile 1	Additional Equipment Pro...	⚠ Publish needed				2 weeks ago	

The list of branches has the following information per branch:

- **Branch:** Branch name
- **Branch Prefix:** Three-character branch prefix
- **Id:** Branch ID

- **Branch group:** Branch group and any branch sub-groups. If the branch belongs to several groups, you can see (+X) after the branch group tree which you can hover over to see the additional branch groups.
- **S:** Connection status of the agent: C = Connected. D = Disconnected.
- **Agent:** The queue agent assigned to the branch.
- **Operation Profile:** The operation profile assigned to the branch when the branch was last published.
- **Equipment Profile:** The equipment profile assigned to the branch when the branch was last published.
- **Config Status:** The status of the current branch configuration and publishing process. For more information, see “Config Statuses” on page 79.
- **Scheduled:** The date and time that the branch configuration is scheduled to be published.
- **Published:** The date and time that the branch configuration was last published.
- **Deployed:** The date and time that the configuration was last retrieved by the Queue Agent.
- **Latest edit:** The last time the branch was edited.

Config Statuses

This column shows the status of the publishing procedure. The following statuses are available:

OK	The publishing process is completed and it was successful.
Publish failed	The publishing process is completed, but it was not successful. The reported publish error message is shown as a tooltip, when hovering over the icon.
Validation needed	The configuration has been changed and the branch needs to be validated before it can be published.
Publish needed	The branch configuration has been changed, but not yet published.
Branch disabled	The branch is disabled.
Publishing...	The configuration is published, but the Queue Agent has not yet retrieved it. The Queue Agent may be offline.

Validation failed	If validation fails for the selected branch when saving, the config status column will show validation error. To fix this, you need to update the branch and save it.
Validating...	Validation process is in progress

Find branches

To find a branch or a particular group of branches, there are options to search for, filter and sort branches.

- **Search:** Search for branch name, queue agent and branch prefix in the search field. Press *Enter* to initiate the search.
- **Filter:** Filter on Branch Group, Operation Profile, Equipment profile and/or Config Status.
- **Sort:** Sort the list of branches by clicking on any column heading.

Create new branch

To create a new branch, click *Create New Branch*. You can also edit a branch by clicking on the branch name in the list of branches.

Edit branch

Save

Discard changes

Publish Configuration

General Information

Enabled ☒

Name Allum

Description

Runtime Setup

Queue Agent Central CFM Engine

CONNECTED

Branch Prefix ALL

Equipment Configuration

Operation Profile Vått och torrt

Equipment Profile Default Profile

Entry Points

Info

Intro8

Parameters

Unit id

Intro8

Additional Information

Time zone Europe/Stockholm

Mobile enabled ☐

Open Hours

Closing Hours

Address

Postcode

City

Country

Latitude

Longitude

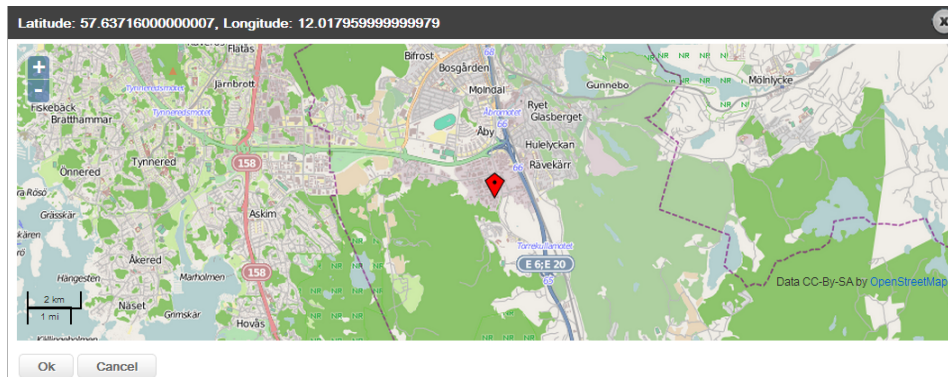
Reset time

Select position

- **Enabled:** Use this checkbox to enable/disable the branch.
- **Name:** Branch name, must be unique.

- **Description:** Branch description
- **Queue Agent:** Select the queue agent that the branch should be connected to.
- **Branch Prefix:** The branch prefix must be three characters and only the letters A-Z are valid (optionally a digit may be used in the third position). If you leave this field empty, a branch prefix is automatically generated when the branch is saved.
- **Time zone:** Branch time zone
- **Mobile enabled:** Check this check box to make the branch available in Mobile Ticket.
- **Open Hours:** Open hours of the branch
- **Closing Hours:** Closing hours of the branch
- **Address:** Branch address
- **Postcode:** Branch postcode
- **City:** City where the branch is located
- **Country:** Country where the branch is located
- **Latitude:** Branch latitude
- **Longitude:** Branch Longitude

Click *Select position* to open a window containing a map where you can select the position of the branch:



When you click Ok, the *Longitude* and *Latitude* for your current position are entered in the corresponding fields.

- **Reset time:** Enter the reset time in the format HH:MM, for example 23:30. The time specified is the local time for the branch and not the queue agent time.

The reset time makes it possible to make sure that all queues start from scratch again, after a specified time each 24-hour period.

When the reset occurs, all active customer journey management sessions are ended as well as all visits with a history (i.e. all visits that have been called at least once). Visits without a history, however, are deleted. All queues are emptied and the current number for the next ticket is set to the start number of that queue.

! Call history in widgets and surface applications are not affected

If you don't want the branch to be reset, leave this field empty.

- **Operation Profile:** Select the operation profile that the branch should be connected to.
- **Equipment Profile:** Select the equipment profile that the branch should be connected to.

At the bottom of the page, you can find the available units for that branch. Here you need to enter information, such as IP address for kiosks. If you try to save the branch without having entered required information for a unit, you will be notified.

Entry Points		
	Info Name Intro17 Description Intro 17 Touch Screen with a Ticket Printer	Parameters Unit id Intro17 Touch Application Widgets enabled ☒ Ticket Printer IP address 192.168.3.167 Low ticket alarm 150 Button delay 2 Start URL http://ip.port/touchScreen?unitId=branchi Device Controller GW1745
	Info Name Web Reception Description Web reception terminal Number of units (max 10) 1	Parameters Unit id WebReception
	Info Name TP3110_Card Description TP3110	Parameters IP address Unit id TP3110_Card

Delete branch

- To delete a branch, go to the list of branches and click *Delete* . Select if you want to disassociate users in the branch.

Publishing branches

If you change the configuration of a branch, the branch needs to be published before the changes are deployed.

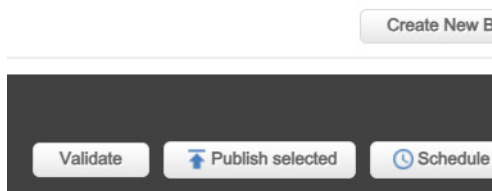
Publishing includes changes that have been performed in the Business Configuration application, such as branch updates and updates to an equipment profile. It also includes changes to the branch hierarchy. If branches have been added to a branch group and you want the users' rights to these branches to be updated, these branches also need to be published. Changes in Surface Editor also need to be published.

Changes performed in the User Management application are, however, published as soon as you click the **Save** button. For example, if you open the Edit User page and add an access right to a branch, then that user is automatically updated, even on the Queue Agent.

⚠ When you publish, the system is reset. Therefore, you should not publish a branch when the system is being used.

Steps

1. Go to *Business Configuration > Branches*
2. In the list of branches, select the branches you want to publish.
3. Click *Validate* to make sure that no required configuration is missing before you publish.



4. Click *Publish selected* to publish the branch or branches. In the warning that appears, click *Publish* again to confirm.
5. The branch will change status to "Publishing...". If the branch was published successfully, you will see a green check mark in the Config Status column.

Schedule publishing of branches

You can schedule branches to be published later. This makes it possible to change all the required configuration during daytime and then schedule the publish to happen after business hours.

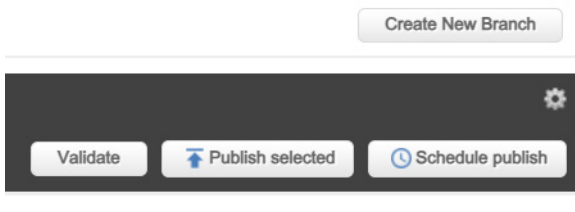
The following applies to scheduling:

- Local branch time is used, so if you have branches in different time zones, they will be published at different occasions.

- The configuration that is deployed is the one that exists in the central server at the point when the publishing occurs.

Schedule branches to be published

1. Go to *Business Configuration > Branches*
2. In the list of branches, select the branches you want to schedule for publishing by checking the checkbox to the left.
3. Click *Schedule publish*.



4. Optionally, enter a name for the schedule. This makes it easier to identify the schedule later.
5. Enter the date and time.
6. Click *Schedule* to create the schedule.

All upcoming scheduled items can be seen above the list of branches. You can also see the schedules where the publishing occurred during the past 24 hours.

Branches

 A screenshot of the 'Branches' management page. At the top, there is a search bar, a 'Branch Group' dropdown, and an 'Operation Profile' button. Below this, it says 'Showing 35 of 35 branches' and '0 selected' with a checkbox and 'Show selected only' link. A section titled 'Scheduled items to be published' with a 'Hide' link shows a single item: 'Publish at nine 2024-11-08 21:00' with a clock icon and a '7' in a blue box. Below this is a table of branches.

☐	Branch	Prefix	Id	Branch Group
☐	LoadBranch3000	AA0	1	
☐	LoadBranch3001	AA1	2	REGIONS / North
☐	LoadBranch3002	AA2	3	

Manage schedules

- To change the time or date for a scheduled item, find the schedule above the list of branches and click *Actions*  *> Reschedule*.

- To add or remove a branch from a schedule, find the branch and click
Action  in the rightmost column and then select *Add branch to schedule* or *Remove branch from schedule*.
- To delete a schedule, find the schedule above the list of branches and click
Actions  > *Delete*.

Branch Hierarchy

In the *Business Configuration* application, in the *Branch Hierarchy* tab it is possible to edit the branch hierarchy of your created branches.

The screenshot shows the 'Branch Hierarchy' interface. At the top, there are 'Save' and 'Discard changes' buttons. The interface is divided into several sections:

- Branch hierarchy:** A tree structure on the left showing 'Branch hierarchy' expanded to 'REGIONS', which contains 'Norr' (selected), 'Mellan', and 'Syd'.
- Selected group:** A form on the right for the selected group 'Norr', with fields for 'Name' (containing 'Norr') and 'Description'.
- Sub groups:** A section with a 'Create new' link and a table with columns 'Name', 'Description', and 'Delete'. The table is currently empty, showing '1-1 of 0' items.
- Assign branches:** A section with two boxes: 'Available branches' (containing 'Stockholm' and 'Ystad') and 'Selected branches' (containing 'Haparanda'). Between the boxes are four arrow buttons: '>', '>>', '<<', and '<'.

If no branch groups have yet been created, you can create them by clicking the *Create new* link in the *Sub groups* area to the right. The following window will be displayed:

The 'Create subgroup' dialog box has a title bar with a close button (X). It contains two input fields: 'Name' and 'Description'. At the bottom, there are two buttons: 'Add Branch Group' and 'Cancel'.

Enter a *Name* and optionally a *Description*, then click *Save*. The branch hierarchy is displayed in a tree structure to the left. By clicking on a branch group in this tree structure, you can then select which branches should be connected to that branch group, by moving them to the *Selected branches* box, using the arrow buttons.

When done creating or editing your branch hierarchy, click **Save**.

Services

In the Services page, all existing services are listed.

Services

Create service

Used	▲ Internal name	External name	Delivered services	Serving time (mm:ss)	
yes	Boat loan	Boat loan	loan discussed	40:00	
yes	Car loan	Car loan	loan discussed	90:00	
yes	House loan	House loan	loan discussed	60:00	

1-3 of 3

To delete a service, click *Delete* . The service must not be in use to be deleted.

Creating and editing a service

To create a new service, click *Create service*. To edit a service, click on the row in the list of services. The following window is displayed:

Create service

SaveDiscard changes

General Information

Internal name

External name

Internal description

External description

Serving time (mmm:ss)

Ticket layout

Mobile enabled

Booking enabled

Outcome Flow

Delivered services

Outcomes

+ Delivered Service

+ Outcome

Internal name

The *Internal name* of the service, used as information to the staff member, can be displayed on the terminal, for example. This name is mandatory and must be unique.

Internal description

The *Internal description* of the service, used internally, to the staff member. This is optional information.

External name

The *External name* of the service, used as information to the customer, can be printed on a ticket, for example. This name is mandatory and must be unique.

External description

The *External description* of the service, used as information to the customer. This is optional information.

Serving time (mmm:ss)

Enter a Serving time here. The format is (mmm:ss). Serving time is (on average) the time that is required to give the customer this service. This is mandatory information.

Ticket layout

Select a ticket layout by clicking on it. The ticket layouts are created in Surface Editor.

It's possible to select more than one ticket layout, which can be useful for example if you have both Qmatic TP printers and Qmatic Certified Hardware printers in your system. When a ticket is printed, and there is more than one ticket layout enabled, the system selects a ticket layout in the following way:

- If the unit type has a ticket size parameter, a ticket layout that has a matching size (resolution) is selected. The Elo kiosk UTT has a ticket size parameter for example.
- If the unit type does not have a ticket size parameter, the ticket layout that has the default ticket size is selected. This is the case for Qmatic Kiosks with TP printers.
- If the unit type has a ticket size parameter, and there is no ticket layout with a matching size, the ticket layout that is returned first in order from the database is selected. The ticket is then printed with best efforts even though the ticket layout size doesn't match the ticket size.

To select more than one ticket layout, hold down the ctrl key while selecting the wanted ticket layouts.

Mobile enabled

Check this check box to make the service available in the Mobile Ticket application.

Booking enabled

Check this check box to make the service available for Booking in your external booking system.

Outcome Flow

In the *Outcome Flow* area:

Here, delivered services and outcomes are displayed and added, in a tree structure.

A delivered service is used to let staff members document which service was offered to the customer. Typically, a delivered service is a more specific definition of the service the customer chose when entering the branch.

By clicking on the + *Delivered service* link, you can add delivered services.

An outcome is used to let staff members document the outcome of a service or delivered service offer. Outcomes are managed as marks.

For more information, see "Marks" on page 90.

By clicking on the + *Outcome* link, you can add outcomes.

Marks

When the *Marks* page is entered, all available mark types are listed. When the system is started for the first time, there are two existing mark types in the system:

- *Outcome* (without any values). This mark type can not be deleted.
- *NPS*, with the values *0-10* and *skip*.

Mark Types

Name	Description	Marks
NPS	System default mark type for Net Promoter Score (NPS)	0 1 10 2 3 ...and 7 more
Outcome	System default mark type for service outcomes	

Creating and editing a mark

To create or edit a mark, click on the applicable row in the list of mark types. Then, to create a new mark, click the *Create New Mark* button.

Marks

Save
Discard changes
Create New Mark

Outcome
System default marktype for service outcomes

Name

loan granted

loan not granted

Name

The Name of the mark is entered here. It is mandatory and should be unique.

Enter a suitable name in the *Name* field. If the setting *Codes enabled* was enabled for the mark type, then you will also need to enter a *Code*.

Then, click the *Save* button to save the mark.

Here, it is also possible to delete marks that have already been created, by clicking the Delete button, .

When marks have been added, they will appear on the mark types list.

Marks can also be added by adding new outcomes when creating a new service.

For more information, see “Services” on page 87.

5. Surface Editing

Topics in this chapter

Introduction	92
Surface Editor overview	93
Create a surface	96
Touch screen surfaces	97
Media display surface	102
Positional display surfaces	106
Web CFU application	114
Ticket surfaces	118
Components	123

Introduction

The layout on touch screens, media displays, tickets, etc are made up from surfaces ("surface applications") that you create and edit in Surface Editor.

There are several surface types:

- Touch screens (kiosks)
- Media displays
- Positional displays
- Tickets.

Several devices can use the same surface. In this case, they would all have the same layout (buttons and images) and would be managed in one and the same place.

A Qmatic device with a touch screen has a web browser that displays the content. Since the surface is a web application, the only limitation of what can be displayed on the screen is the limitation of the web browser in the unit.

One common usage is to display the ticket buttons that are installed at the branch in question. When a customer presses a button, a ticket is printed.

Other examples of surfaces are screens where the customer might have to register or identify her/himself, either using a magnetic card, a bar code or by entering data or PIN-codes in an HTML form on the screen.

A set of web widgets is also available for surfaces. These widgets can perform almost anything that can be done with a web application. The installed widgets do things like:

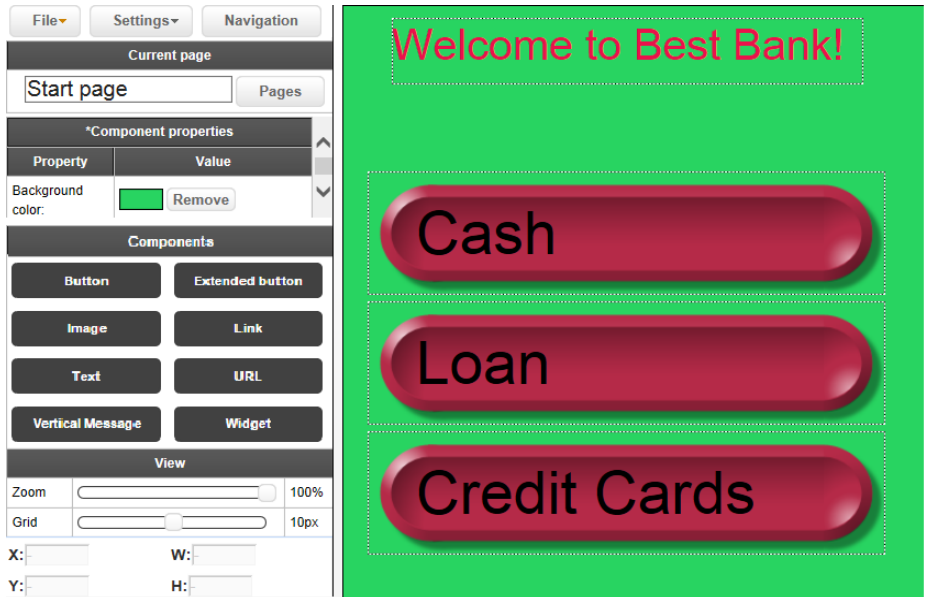
- Display the called ticket number
- Display previously called ticket numbers
- Play a "ding" sound when a ticket is called

Each device with a touch screen must be configured to connect to Qmatic Orchestra with its unique unit ID (**unitId**) as a parameter. For Vision, Intro 17 and TP Touch/Intro 8, you can configure this on the settings page for the device in question. A generic touch device must be setup to connect with Qmatic Orchestra with the unitID as an HTML parameter.

All unit IDs are automatically generated in Qmatic Orchestra, but a unit ID can be re-configured, as long as it is unique.

Surface Editor overview

This is the main page of the Surface Editor while editing a surface, in this case a touch screen.

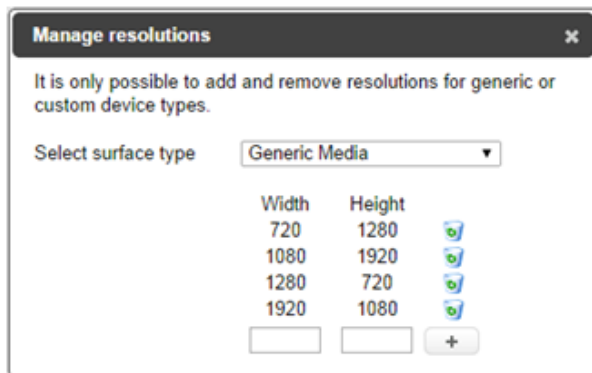


The following features are available:

- **File** menu - containing the options **New**, **Open**, **Save**, **Save as**, **Delete** and **Preview**.

ⓘ Previewing a surface is done on the central agent. If there are no central branches, some parts of previewing a surface will not work, e.g. vertical messages. If the fonts available on central differ from those on a distributed agent, there might be discrepancies between the preview and actual look of the surface.

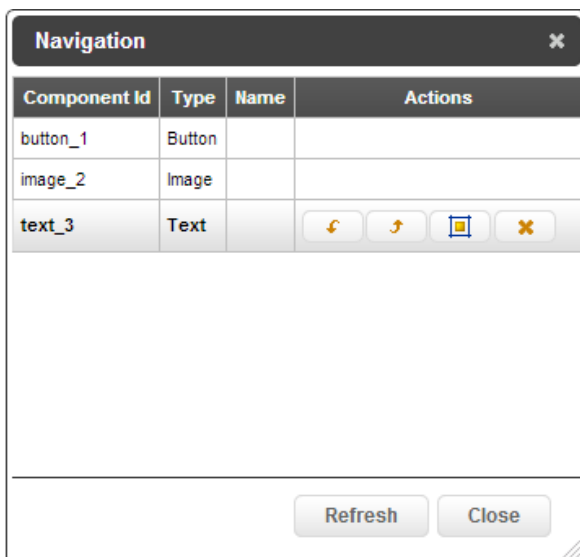
- **Settings** menu - containing two choices: **Surface settings** and **Manage resolutions**.
 - Surface settings - opens the **Application settings** for the surface that you are creating. For example, you can select another operation profile.
 - Manage resolutions - here you can add or remove resolutions for generic or custom device types:



To add a resolution, enter the values in the empty boxes, then click the **+** button. To remove a resolution, click **Remove**. Newly added resolutions will immediately be available when creating new surfaces.

ⓘ It is not possible to remove all resolutions for a surface type.

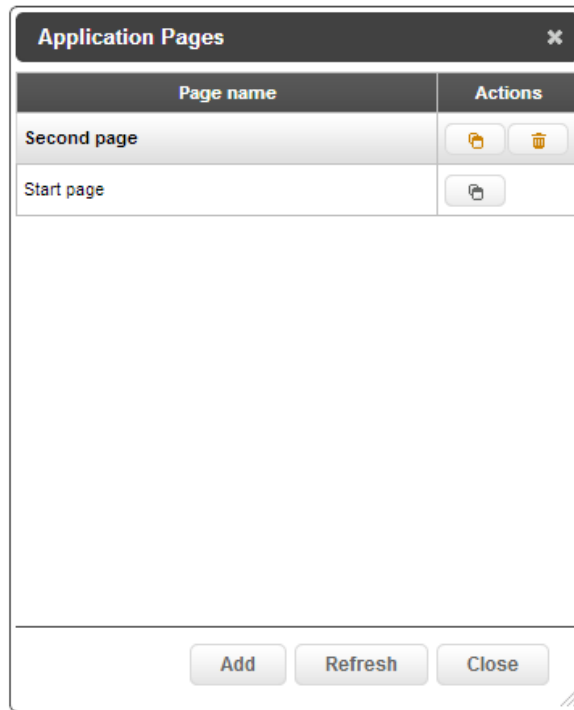
- **Navigation** - this option opens up the Navigation panel:



Here, all components of the layout are listed. This way, it is possible to find components that are hidden in the layout. Three actions can be performed on a component here: **Remove**, **Bring to front** and **Send to back**.

- **Canvas** area - the layout of the surface application being edited.
- **Current page** area - here you can see the name of the current page.

- **Pages** button - this option opens the **Application Pages** panel:



In the Application Pages panel you can duplicate, add, or delete pages.

Depending on the type of surface you are creating, there are certain rules that apply to the Application Pages:

- The start page for a touch application may never be deleted.
- For media displays and positional displays, you will always have a start page and a call page.
- For Ticket layouts, the number of pages depends on if you selected Single or Double in the Application Settings window.
- **Component properties** area - the properties of the component being edited: text, font properties, links to other pages and the like.
- **Components** area - at the bottom is a list of rectangles representing components that can be inserted, by drag and drop, onto the canvas: buttons, images and the like.
- **View** area - here are sliders for **Zoom level** and **Grid resolution** as well as the coordinates and dimensions of the component being edited. These values can be edited directly for most components.

Create a surface

To create a surface:

1. Click **File > New**.
2. Select a surface group, a device type and a resolution.
3. Configure the surface settings, for example you need to select an operation profile.
4. Drag and drop the wanted components to the surface.
5. When done, save.

Examples of how to set up different surface types are described in the sections below:

- “Create a touch screen surface” on page 97
- “Create a media display surface” on page 102
- “Create a positional display surface” on page 106
- “Creating the Web CFU surface” on page 115
- “Create a ticket surface” on page 118

A description of available components to use in surfaces can be found here:

- “Components” on page 123

Touch screen surfaces

The touch screen surface type is used for kiosk surfaces. The following device types are available for touch screens:

- Intro 8
- Vision 15
- Vision 17
- Intro 17
- Intro 8 G2
- Generic touch: This type allows you to select from a set of pre-defined generic resolutions. You can add resolutions in *Settings > Manage resolutions*.

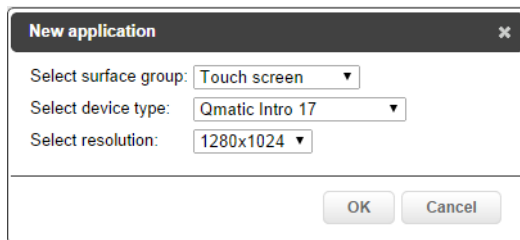
Create a touch screen surface

ⓘ The procedure below is an example of how a touch screen can be set up.

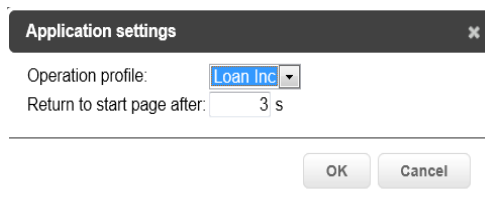
For more information about the components mentioned in the instruction, see “Components” on page 123.

To create a surface for a touch screen:

1. In the **File** menu, click **New**. Select **Touch screen** as surface group. Select device type and resolution from the drop-down lists.



2. Select an operation profile and a Return to start page time.



Click **OK**. The Start page is opened. Click **Pages** to open the Application Pages panel, where you can add a second page, if wanted. You can also duplicate or delete a page.

3. Click on the surface area. The following settings area will be displayed:

*Component properties	
Property	Value
Background color:	Remove
Background image:	Edit Remove
Page locale	English ▼
Return to start page	

Here you can set Background color, Background image, Page locale and Return to start page time.

4. Drag and drop the Button components that you want on your touch screen.

File ▾ Settings Navigation

Current page

Start page Pages

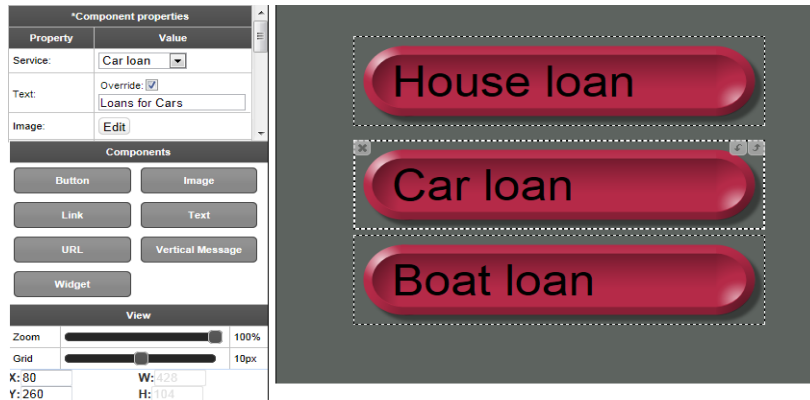
*Component properties	
Property	Value
Service:	House loan ▼
Text:	Override: ☒ Loans for houses
Image:	Edit

House loan

5. For each button, select which service should be connected to it, from the drop-down list. If you want other text than the external name of the service to be displayed, check the **Override** check box and enter text in the **Text** field.

If you want to, edit the button image, add a link to the page, change the background color and change the properties for the text that is displayed.

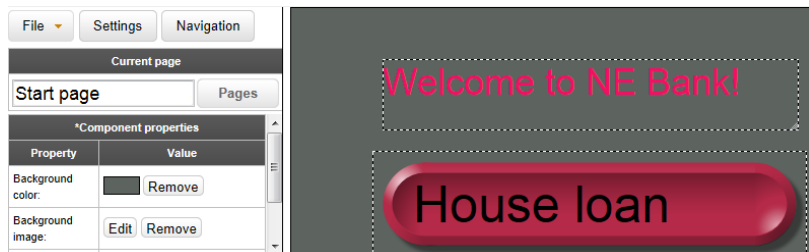
The finished result may look like this:



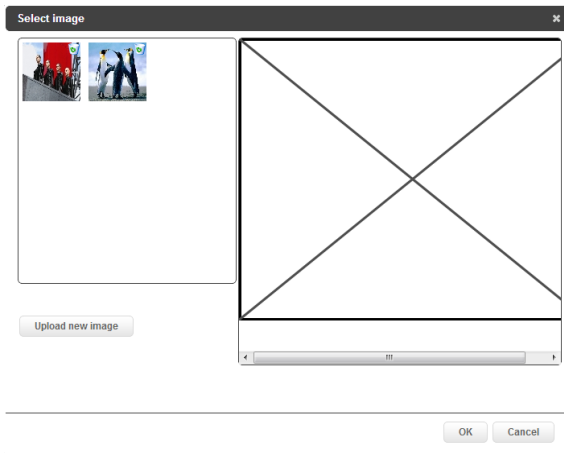
6. Add text to the surface by dragging and dropping the Text component from the bottom left area of the page to the surface area.

The text color, font, size and properties of the text may be changed to your liking.

After adding text, the finished result may look like this:



7. You can also add an image, by dragging and dropping the Image component from the bottom left area of the page.



Select which image you want to upload, then click **OK**.

It is also possible to change a few settings for the image, such as size.

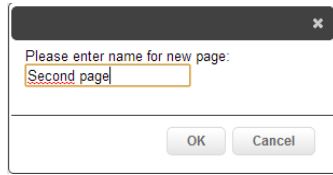
The finished result may look like this:



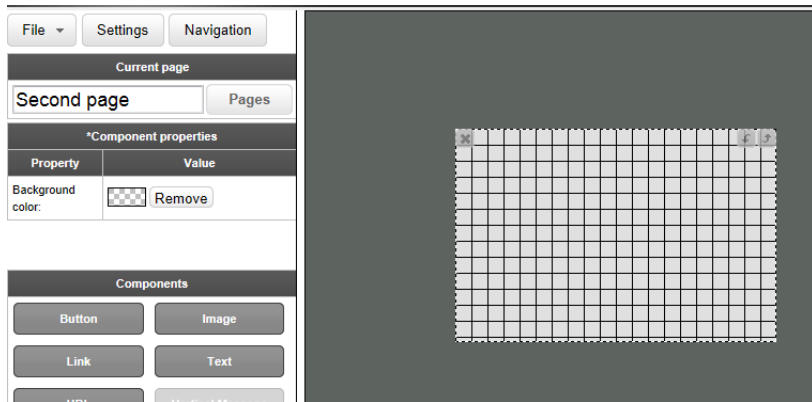
At this stage, you can create a second page for your touch screen application.

A common use for a second page on a touch screen is to use it for a vertical message. The second page is shown after the customer has selected a service and can be used to show a message related to that service.

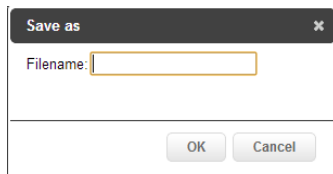
1. To add a second page, click **Pages** and select **Add** in the Application Pages panel.
2. Give the second page a name:



3. To add a vertical message to the second page, drag and drop the Vertical Message component to the wanted position of your surface. The finished result may look like this:



4. When done entering and editing the components to your liking, save the touch screen surface application by choosing **Save**, or **Save as** in the File menu in the upper left corner.



Connect a touch screen to a surface application

To connect the touch screen on a kiosk to a surface application, you need to configure the server IP, the websocket port, the branch prefix and the unit ID in the kiosk settings. For Intro 8 G2 and Intro 17, this is done on the configuration pages. For Qmatic Certified Hardware Kiosks, this is done in the Qmatic Kiosk app settings.

Media display surface

The media display surface type can be used for waiting area displays. The following device types are available for media displays:

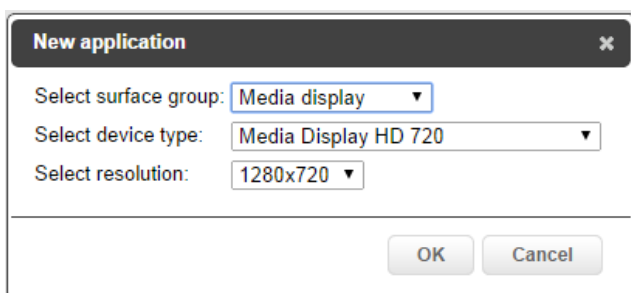
- Media Display HD 720
- Media Display Full HD 1080
- Media Display HD 720 Portrait
- Media Display Full HD 1080 Portrait
- Generic Media: This type allows you to select from a set of pre-defined generic resolutions. You can add resolutions in *Settings > Manage resolutions*.

Create a media display surface

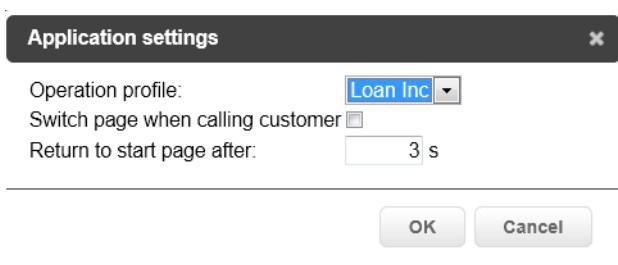
! The procedure below is an example of how a media display can be set up.

To create a new surface application for a media display:

1. In the **File** menu, select **New**, then select **Media Display** in the New application window. Also, select device type and resolution from the drop-down lists.



2. Select an operation profile and set a Return to start page time.



When you click on **OK**, the **Start page** opens. In the drop-down list, you can also select **Call page**.

- Click on the surface area. The following **Component properties** area is displayed:

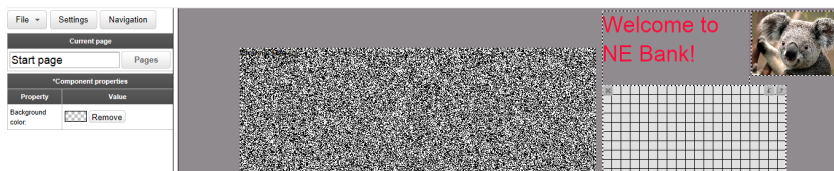
Property	Value
Background color:	 Remove
Background image:	Edit Remove
Page locale	English ▾
Return to start page	

Here you can set **Background color**, **Background image**, **Page locale** and **Return to start page**.

- Next, drag and drop the any component from the bottom left area of the page to the media player surface application. For example, you can add some text, an image or the channel player.

⚠ Please make sure that you do not upload too large images, since this may cause problems when the images is displayed. Our recommendation is a max width of 950 px and a max height of 750 px.

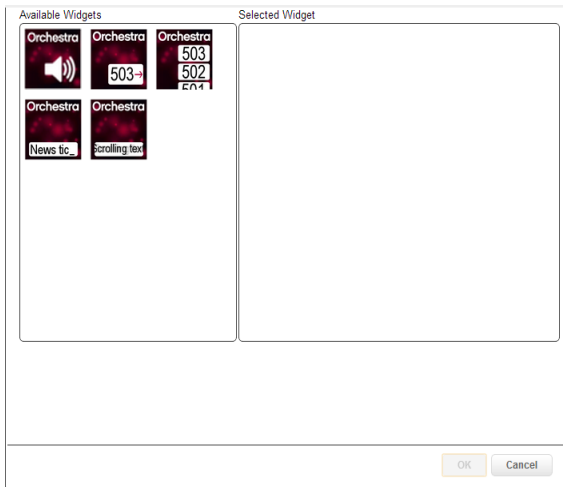
The finished result may look like this (note that all of the surface is not visible in the image):



- Create the call page. Click the **Pages** button and select the call page in the Application Pages panel.

Use the call page for information that should be displayed when a ticket is called, for example the ticket number widget and a vertical message.

- To add a Widget component to the call page, drag and drop it from the bottom left area of the page to the surface area. After the placeholder has been placed on the surface, select a widget and click **OK**.



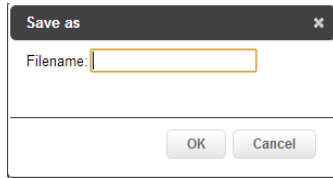
7. In the Component properties area, change properties such as which text should be displayed, the color of the text, the text size and blink duration:

*Component properties	
Property	Value
Widget	Reset
Background color	Remove
Font color	Remove
Font	Helvetica 28px Edit
Ticker text	This is a ticker text...
Direction	Left to right v
Speed	3 v
Duration (ms)	2000

The finished result may look like this:



8. When done entering and editing the components to your liking, save the surface application.



Connect a media display to a surface

To connect media displays to a surface application, you need to configure the server IP, the websocket port, the branch prefix and the unit ID in the display settings. For Qmatic Certified Hardware waiting area displays, this is done in the Qmatic Display app settings.

Running a media display in a regular browser

If you want to run a media display in a regular browser, use the following url:

`http://[qagent_ip]:[qagent_port]/graphicalDisplay?unitId=[branchPrefix]:[unitId]`

For example:

`http://127.0.0.1:8080/graphicalDisplay?unitId=HOS:HubMedia`

Positional display surfaces

The positional display surface type can be used for counter displays. It can show any type of information, including multimedia. The following device types are available for positional displays:

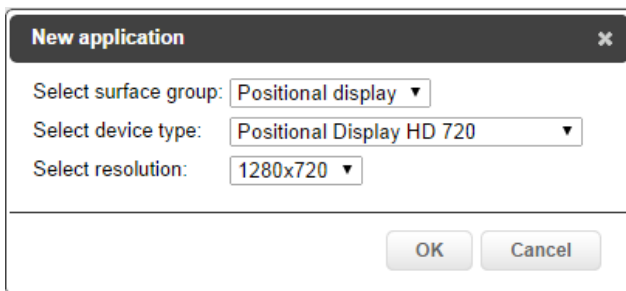
- Positional Display HD 720
- Positional Display HD 720 Portrait
- Positional Display 600 x 1024
- Positional Display 1024 x 600
- Positional Display 768 x 1024
- Positional Display 1024 x 768
- Positional Display 1536 x 2048
- Positional Display 2048 x 1536
- Generic Display: This type allows you to select from a set of pre-defined generic resolutions. You can add resolutions in *Settings > Manage resolutions*.

Create a positional display surface

! The procedure below is an example of how a positional display can be set up.

To create a new surface for a positional display:

1. In the **File** menu, select **New**, then select Positional display in the New application window. Also select device type and resolution from the drop-down lists.



2. Select Operation profile and set a Return to start page time.

Application settings

Operation profile:

Loan Inc

Switch page when calling customer

☐

Return to start page after:

3 s

OK

Cancel

Click **OK**. The **Start page** opens. If you click **Pages**, the Application Pages panel, where you can also select **Call page**, will be opened.

- Click on the surface area. The Component properties area is displayed:

Property	Value
Background color:	 Remove
Background image:	Edit Remove
Page locale	English
Return to start page	

Here you can set **Background color**, **Background image**, **Page locale** and **Return to start page**.

- To add some text to the positional display surface, drag and drop the Text component from the bottom left area of the page to the surface area.

Here, it is possible to edit for example text size, text color and alignment.

Text:

Welcome to N.E Bank!

Text color:



Font:

Arial 36.3636360168457px

Change

Add

Align:

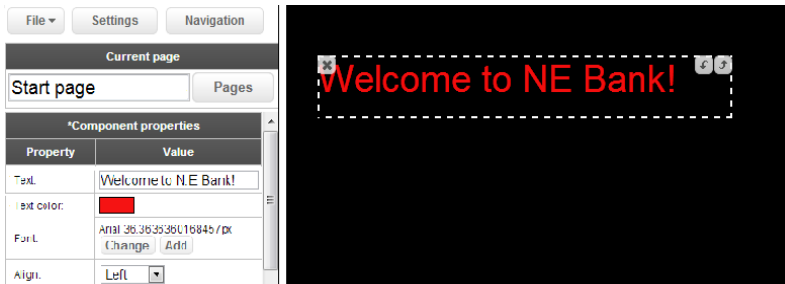
Left

Background color:



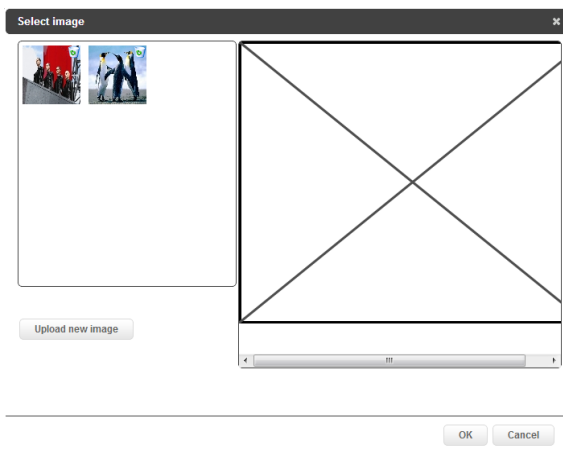
Remove

The finished result could look like this:



5. Drag and drop the Image component from the bottom left area of the page to the surface area, to add an image to your positional display.

When the image place-holder is placed on the surface, the Select image window is opened:



Here you can select which image you want to upload.

It is also possible to change a few settings for the image, such as size.

6. Next, drag and drop the Channel Player component from the bottom left area of the page to the positional display surface application. It is possible to set the size of the channel player area as well as if it should be muted or not.
7. Add a vertical message, by dragging and dropping that component from the bottom left area of the page to the surface area.

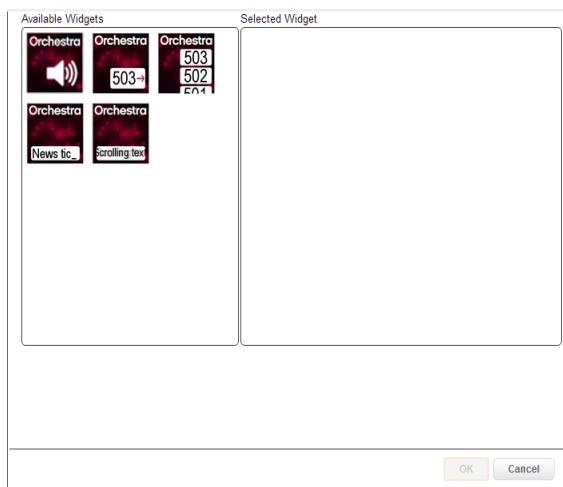
The finished result may look like this:



8. Switch to the call page, by clicking **Pages** and selecting it in the Application Pages panel.

A common use for the call page on a positional display is placing the widget Ticket Call and a Vertical Message component on it. These components will then only be visible when a ticket is called.

9. To make the background of the call page transparent, click **Remove**, next to the Background color property. This will make the page look like a pop-up window.
10. Add a Widget component to the call page, by dragging and dropping it from the bottom left area of the page to the surface area. After the placeholder has been placed on the surface, the Select a Widget window is opened:

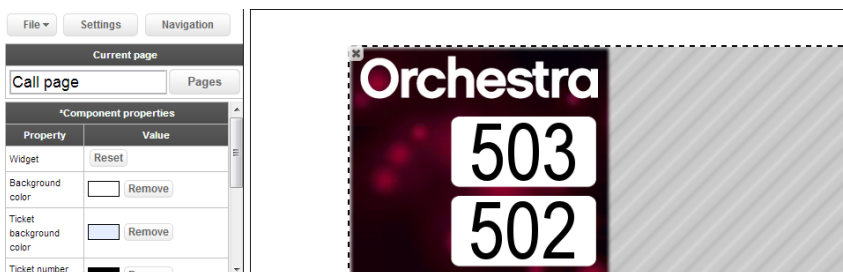


Select the appropriate widget and click **OK**.

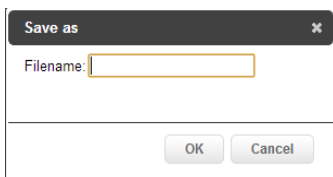
11. In the Component properties area, change properties such as which text should be displayed, the color of the text, the text size and blink duration:

*Component properties	
Property	Value
Widget	Reset
Background color	Remove
Font color	Remove
Font	Helvetica 28px Edit
Ticker text	This is a ticker text...
Direction	Left to right
Speed	3
Duration (ms)	2000

The finished result may look like this:



- When done entering and editing the components to your liking, make sure you save the surface application, by choosing **Save**, or **Save as**, in the File menu.



Connect a positional display to a surface

To connect positional displays to a surface, you need to configure the server IP, the websocket port, the branch prefix and the unit ID in the display settings. For Qmatic Certified Hardware counter displays, this is done in the Qmatic Display app settings.

Running a positional display in a regular browser

If you want to run a positional display in a regular browser, use this URL:

`http://[qagent_ip]:[qagent_port]/graphicalDisplay?unitId=[branchPrefix]:[unitId]`

For example:

```
http://127.0.0.1:8080/
graphicalDisplay?unitId=GBG:ServicePoint_PositionalDisplay
```

ⓘ Note that if several positional displays are to be used, then you would have already given them unit IDs ending with different numbers, in your equipment profile and hence the URL to be used must also end with the different numbers of the different positional displays.

For example:

```
http://127.0.0.1:8080/
graphicalDisplay?unitId=GBG:ServicePoint_PositionalDisplay1
http://127.0.0.1:8080/
graphicalDisplay?unitId=GBG:ServicePoint_PositionalDisplay2
```

Using multiple surfaces

If you are using a unit type that contains multiple surfaces, such as for example a Web Service Point Terminal with a positional display *and* a Web CFU, then you need to consider the following when it comes to which url to use:

- Which device are you after?

Example 1

To point out the Web CFU surface application in the UTT
WebServicePoint_PositionalDisplay_WebCFU:

A.

```
http://[qagent_ip]:[qagent_port]/graphicalDisplay?unitId=[branchPrefix]:[unitId]
```

For example:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU
```

In this case, we are not pointing to a specific device, so the first device in the <devices> element of the unit.xml surface application, WebCFU, is selected.

B.

```
http://[qagent_ip]:[qagent_port]/
graphicalDisplay?unitId=[branchPrefix]:[unitId]:[device type number]:[device
number]
```

For example:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:81:
1
```

In this case we are explicitly pointing at a specific device, using device type number and device number.

Since WebCFU is the first device, it is also possible to use a URL containing only the device type number, in this case:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:81
C.
```

```
http://[qagent_ip]:[qagent_port]/
graphicalDisplay?unitId=[branchPrefix]:[unitId]:[device type name]:[device
number]
```

For example:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:PO
SITIONAL:1
```

In this case we are explicitly pointing at a specific device, using device type name and device number.

Since WebCFU is the first device, it is also possible to use a url containing only the device type name, in this case:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:PO
SITIONAL
```

Example 2

To point out the Positional Display surface application in the UTT
WebServicePoint_PositionalDisplay_WebCFU:

A.

```
http://[qagent_ip]:[qagent_port]/
graphicalDisplay?unitId=[branchPrefix]:[unitId]:[device type name]:[device
number]
```

For example:

```
http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:81:
2
```

Here we need to enter the whole URL, including device type number, because the device is placed second in the `<devices>` element of `unit.xml`.

The same thing applies to device type name:

http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU:PO
SITIONAL:2

Example 3

Use several units.

If you are using several units, then you have entered the number of units in the configuration of the applicable branch, as in the following picture:

The screenshot shows a configuration window for a terminal. On the left, under 'Info', the 'Number of units (max 127)' is set to 3. Below this is a table for 'Unit Identifiers' with three units. Unit 2's name is 'WebServicePoint_PositionalDisplay_WebCFU 2' and its logic ID is 4. On the right, under 'Parameters', various options are checked, including 'Customer information', 'Service Point Pool view', 'User pool view', 'Queues view', 'User Pool Transfer', 'Service Point Pool Transfer', 'Transfer Button', 'Transfer from Queue', and 'Call from Queue'.

Unit	Name	Logic Id
Unit 1	WebServicePoint_PositionalDisplay_WebCFU	3
Unit 2	WebServicePoint_PositionalDisplay_WebCFU 2	4
Unit 3	WebServicePoint_PositionalDisplay_WebCFU	5

Parameter	Value
Unit id	WebServicePoint_PositionalDisplay_WebCFU
Media App. Pos. Display	
Media App. CFU	
Customer information	☒
Service Point Pool view	☒
User pool view	☒
Queues view	☒
User Pool Transfer	☒
Service Point Pool Transfer	☒
Transfer Button	☒
Notes Button	☐
Park Button	☐
Transfer from Queue	☒
Call from Queue	☒

In this case, the URL will be as follows:

http://localhost:8080/
graphicalDisplay?unitId=GBG:WebServicePoint_PositionalDisplay_WebCFU2

The rules in Example 1 and Example 2 apply to this example too.

⚠ Make sure that there is no space in the Unit Id, even though there is a space in the GUI.

Web CFU application

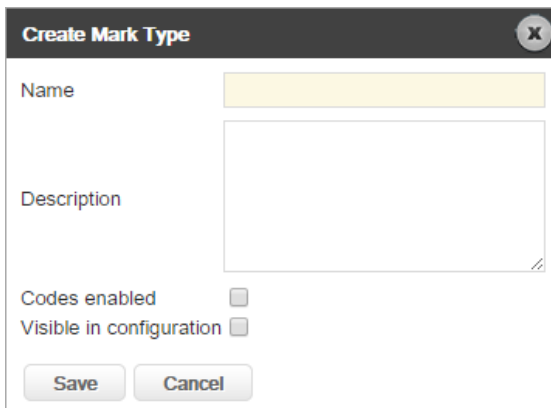
A positional display surface application can also be used for a Web Customer Feedback Unit (CFU) tablet.

ⓘ Before it is possible to create this surface application, you must have created mark types and marks. This is described below.

Creating a Mark Type for CFU

Please follow these steps:

1. In the System Administration application, go to the Mark Types tab.
2. Click **Create Mark Type**. The following window is opened:



The screenshot shows a 'Create Mark Type' dialog box. It has a title bar with the text 'Create Mark Type' and a close button (X). The dialog contains the following fields and controls:

- Name:** A text input field.
- Description:** A larger text area for a description.
- Codes enabled:** A checkbox.
- Visible in configuration:** A checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Enter a name and optionally a description. Decide if codes should be enabled and if it should be visible in the configuration.

When done, click **Save**.

3. Follow the steps in “Create marks for CFU” on page 114.

Create marks for CFU

1. In the Business Configuration application, go to the Marks tab.
2. Select the mark type that you just created, in this example CFU.
3. Click **Create New Mark**. The window will now look like this:

Marks

The screenshot shows the 'Marks' interface with a dark header bar containing 'Save', 'Discard changes', and 'Create New Mark' buttons. Below the header, the 'CFU' mark type is selected, with the description 'Mark type used for Customer Feedback'. A table with two columns, 'Name' and 'Code', is visible. The 'Name' column has a red input field, and the 'Code' column has a yellow input field. A trash icon is present at the end of the row.

4. Enter a suitable name. If codes are enabled for the mark type, enter a code.

The following is an example of what the marks for CFU could look like when done:

Marks

The screenshot shows the 'Marks' interface with the same header as the previous image. The 'CFU' mark type is selected. Below the header, a table with two columns, 'Name' and 'Code', is visible. The table contains four rows of data: 'Bad' with code '3', 'Excellent' with code '1', 'Good' with code '2', and 'Terrible' with code '4'. Each row has a trash icon at the end.

5. Save the marks.
6. Follow the steps in “Creating the Web CFU surface” on page 115.

Creating the Web CFU surface

Please follow these steps:

1. In System Administration, go to the Widgets tab and make sure that you have mapped the Customer feedback for tablet widget to the applicable surfaces.
2. In Surface Editor, create a new surface for a positional display, select **Generic Positional Display** and the resolution used on your tablet, for example 1024 x 600. Select an operation profile and other settings in the same way as for a normal positional display.
3. Add a Widget component to the surface on the call page and select the Customer Feedback for tablet widget.

ⓘ Make sure that you add it to the call page.

This widget can show up to 5 different buttons. The first step is to select a mark type. Here you select the mark type that you have previously created for this kind of CFU. In this example, we will use **CFU**.

4. Now you are able to select a **Result mark** for each button. If no Result mark is entered, that button will not be shown on the tablet. The following is an example, using the marks we have created in our examples above:

Mark type	CFU ▼
Result mark for Button 1	Excellent ▼
Result mark for Button 2	Good ▼
Result mark for Button 3	Bad ▼
Result mark for Button 4	Terrible ▼
Result mark for Button 5	[None] ▼

Other settings that can be set are:

- Individual text for each button
- Image for each button
- Background color for the widget
- Message to be shown after one has pressed a button, “Thank you message”.
- Image to be shown after one has pressed a button.
- Time the “Thank you message” is shown.
- Delay time between customer called and buttons should appear.
- Horizontal or vertical layout.
- Position of the text.

5. When done, save your surface application with a suitable name.

UTT settings for Web CFU

Follow these steps to add and configure a unit type template (UTT) in Qmatic Orchestra:

1. In System Administration, in the Unit Types tab, add the wanted unit types, for example “WebServicePoint_D924:WebCFU”. Click **Save**.
2. In Business Configuration, add the unit type to the wanted equipment profile. Configure the unit type to your liking. For more information, see the Standard Unit Types Guide.

ⓘ In this example, make sure that you select the media application that we created above. If you are using a unit type with several media applications, please read “Using multiple surfaces” on page 111.

Also, check the Custom Marks check box and then enter **CFU** in the Marks type field. When done, save the equipment profile.

3. In Business Configuration, go to the Branches tab and make the wanted configuration.
4. Publish the branch(es).

Connect the tablet to the surface

On the tablet, you must open the following URL:

`http://[qagent_ip]:[qagent_web_port]/pages/graphicaldisplay/
graphicaldisplay.jsp?unitId=[branch_prefix]:[unit_id][unit_number]`

- **[unit_id]** = Unit Id as found in your branch settings
- **[unit_number]** = number identifying the service point. Should only be used when there is more than 1 unit for this service point.

Ticket surfaces

When a new system is started for the first time, there is a default ticket layout available in the system. Ticket layouts determine the look of the printed ticket.

You can insert basic system information on a ticket, such as queue number, button name and time. More advanced system information can be inserted with scripts.

You can also add text, which you can format in any way you want.

Images for tickets can be created from ordinary pictures, for example a logotype. The format must be monochrome and Windows bitmap, bmp.

The following device types are available for tickets:

- Ticket Printer - This device type should be used for Qmatic Ticket Printers, printing on Genuine Qmatic Tickets. The resolution is 432x460 pixels.
- Generic Printer - This device type allows you to select from a set of pre-defined generic resolutions. You can add resolutions in *Settings > Manage resolutions*. Use the generic printer device type with resolution 576x613 for the Elo printers in Qmatic Certified Hardware assortment.

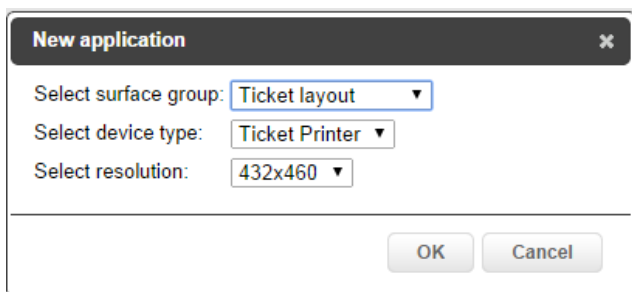
Create a ticket surface

! The procedure below is an example of how a ticket can be set up.

For more information about the components mentioned in the instruction, see "Surface Editor overview" on page 93.

To create a surface for a ticket:

1. In the File menu, select **New**, then select Ticket Layout from the drop-down list, in the New application window. Also select device type and resolution from the drop-down lists.



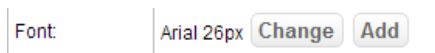
2. In the Application settings window, select if the ticket length should be Single or Double, from a drop-down list.



3. To add some text to the Ticket surface, drag and drop the Text component from the bottom left area of the page to the surface area.

The text color, font, size and properties of the text may be changed to your liking.

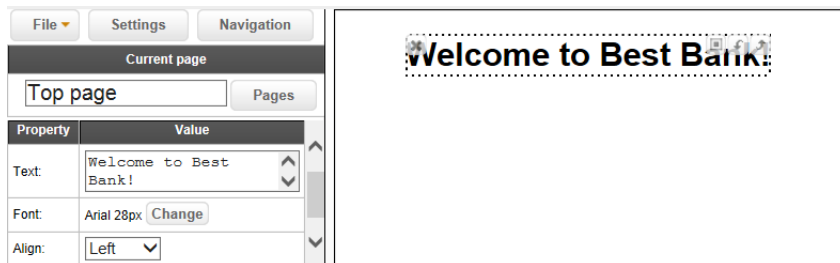
! It is also possible to change or add new fonts, by clicking on the corresponding button in the Text properties window:



Click **Change** to change font, font size and decide if the font should be Bold and/or Italic:

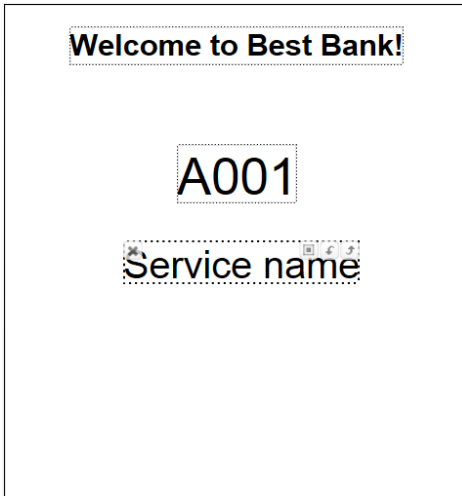
To add a font, click **Add**.

After adding text, the finished result may look like this:



4. Next, it is time to add some system information to the ticket. Drag the System Information component from the bottom left area of the page to the surface area. System information can be information such as date, ticket id etc.
5. For this example, select Ticket id from the System information drop-down list. Also, increase the text size to 48 px and change the alignment to Center, in the drop-down list.
6. Add another System information component and select Service name from the drop-down list.

The result may look something like this:



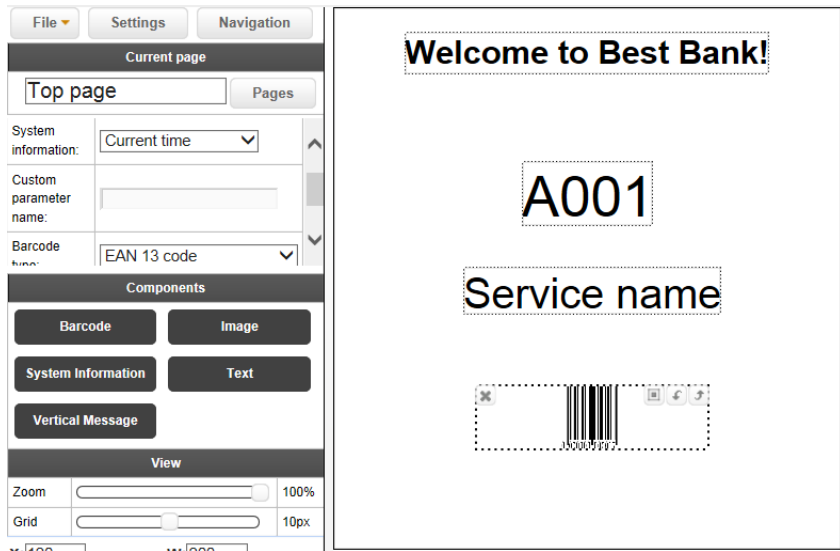
7. Add a Barcode component, by dragging and dropping the Barcode component from the bottom left area of the page to the surface area.

For barcodes, it is also possible to select which System information should be displayed, from a drop-down list.

Also, you must select which Barcode type that should be used. You can choose between: Interleaved 2/5, ITF-14, Code 39, Code 128, EAN 13 code, DataMatrix (square), DataMatrix (rectangular), and QR Code. You should also decide whether or not to use barcode checksum calculation.

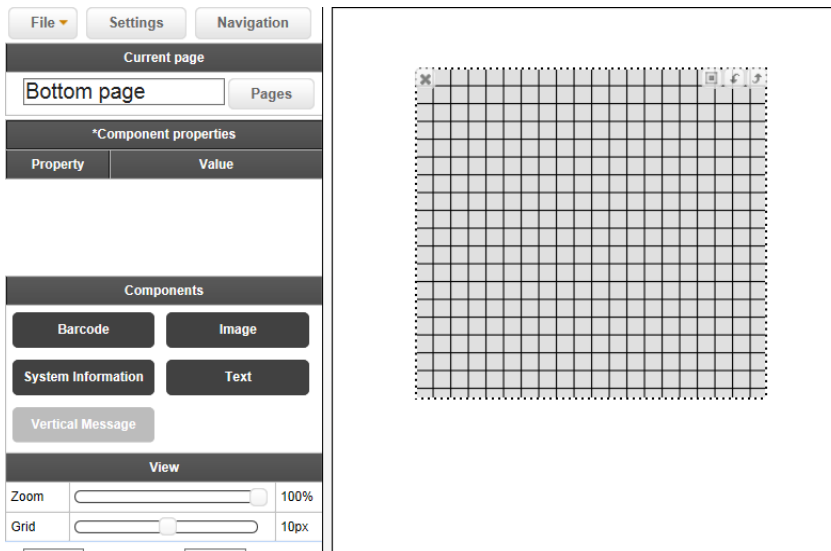
ⓘ Checksums are not used for all barcode types.

The finished result may look something like this:



8. If you selected **Double** from the Ticket length drop-down list in the Application Settings window, now is the time to design the second page. To do so, click **Pages** and select the Bottom page in the Application Pages panel.
9. For example, the Bottom page of a ticket could be a suitable place for a vertical message or an image, so drag and drop the wanted component to the ticket area.

The finished result could look something like this:



10. When done entering and editing the components to your liking, make sure you save the ticket surface application by choosing **Save**, or **Save as**, in the File menu.



Components

In this section, the surface components are described. The following components are available and described in detail below:

- Background
- Button
- Extended button
- Text
- Image
- Vertical Message
- Link
- URL
- Channel Player
- Widget
- Barcode
- System Information

Each component has the option to **Delete**, **Send to back** and **Bring to front**.

Almost all components have location and size that can be set both by dragging them and their corners and by directly editing their numerical coordinates and dimensions (Zoom set to 100%).

Since the fonts are not exactly the same on a PC screen and an Information Surface, there can be some discrepancies between the preview and the actual page on a surface.

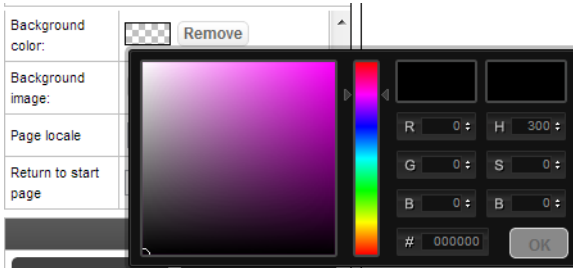
Background

Available for the following surfaces:

- Touch Screen
- Media Display
- Positional Display

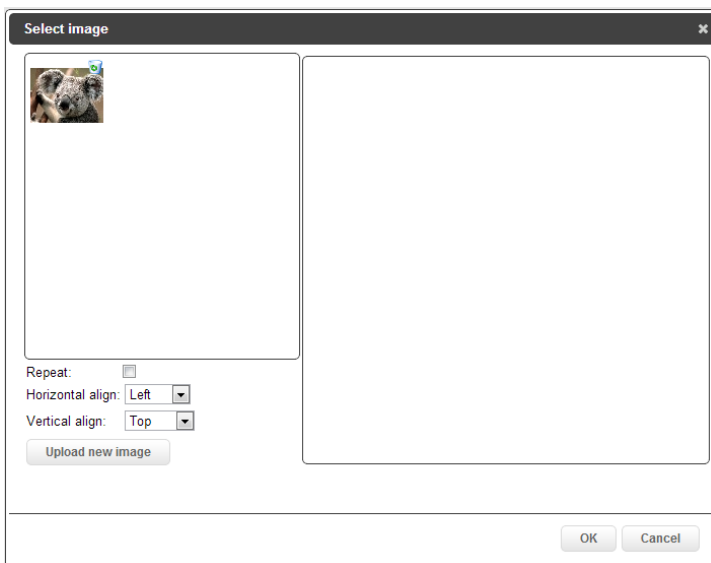
Properties:

- **Background color** - select a background color by clicking on the checked box and selecting the wanted color in the window that is opened:



You can also remove any background color that has been added earlier.

- **Background image** - Click **Edit** if you want to add a background image. The following window will be opened:



Select if the image should be repeated over the background and how it should be aligned, horizontally (left/center/right) and vertically (top/center/bottom). It is also possible to remove a background image that has been added earlier.

- **Page locale** - select the language for the page.
- **Return to start page** - number of seconds for returning to start page.

Button

Available for the following surfaces:

- Touch Screen

Properties:

- **Service** - select which service to connect to, from a drop-down list.
- **Text** - the text that should be displayed on the button. If a service has been selected, there is an Override check box. If it is checked, it is possible to use the text in the Text box instead of the external name of the service, which is used by default.
- **Screen reader text** - the text that the user will hear when navigating to the button if a screen reader is enabled. This requires certain types of Qmatic certified hardware and an ADA keypad device.
- **Image** - image for the button (a default one is available, but it is possible to select another image of your choice). Accepted formats are: jpg, jpeg, png and bmp. We recommend images with a transparent background.
- **Link to page** - link to another page.
- **Text color** - select the wanted color of the text here.
- **Text position** - enter the position (top and left) of the text on the button.
- **Font** - default is Arial, but other fonts may be added.
- **Align** - select, from a drop-down list, if the text should be aligned Left, Right, Center or Justify.
- **Background color** - color of the background area of the button.
- **Keep image aspect ratio** - if this check box is checked, then the width and height of the image, i.e the relative horizontal and vertical sizes, are kept. For example, if a graphic has an aspect ratio of 2:1, it means that the width is twice as large as the height. When resizing graphics, it is important to maintain the aspect ratio to avoid stretching the graphic out of proportion.
- **Image scaling** - Center, Fill, Fit, or Stretch.

For more information, see “Available positions” on page 118.

Extended button

This component should be used when you want a button with several lines of text.

ⓘ Since each button has a permanent unique id, such as **button_extended_0**, it is possible to dynamically set the text content of the button via a widget. This facilitates the use of different languages etc.

To update text in buttons from a widget, in this example for extended button with id **button_extended_0**, update the following:

```
$(window.parent.document.getElementById('button_extended_0')).find('.text_single_element').text('First row');
$(window.parent.document.getElementById('button_extended_0')).find('.text_element_2').text('Second row');
$(window.parent.document.getElementById('button_extended_0')).find('.text_element_3').text('Third row');
```

Available for the following surfaces:

- Touch Screen

Properties:

- **Service** - select which service to connect to, from a drop-down list.
- **Text** - the text that should be displayed, as main text, on the button. If a service has been selected, there is an Override check box. If it is checked, it is possible to use the text in the Text box instead of the external name of the Service, which is used by default.
- **Screen reader text** - the text that the user will hear when navigating to the button if a screen reader is enabled. This requires certain types of Qmatic certified hardware and the ADA keypad device.
- **Image** - image for the extended button (a default one is available, but it is possible to select another image of your choice). Accepted formats are: jpg, jpeg, png and bmp. We recommend images with a transparent background.
- **Link to page** - link to another page.
- **Text color** - select the wanted color of the text here.
- **Text position** - enter the position (top and left) of the main text on the button.
- **Font** - default is Arial, but other fonts may be added.
- **Align** - select, from a drop-down list, if the main text should be aligned Left, Right, Center or Justify.
- **Background color** - color of the background area of the button.
- **Keep image aspect ratio** - if this check box is checked, then the width and height of the image, i.e the relative horizontal and vertical sizes, are kept. For example, if a graphic has an aspect ratio of 2:1, it means that the width is twice as large as the height. When resizing graphics, it is important to maintain the aspect ratio to avoid stretching the graphic out of proportion.
- **Image scaling** - Center, Fill, Fit, or Stretch.

For more information, see "Available positions" on page 118.

- **Text 2 / Text 3** - Here you can edit the settings for the text on row 2 and 3 of the extended button. You can change the Text, Text color, Text position (Top, and Left), Font and how the text should be aligned (Left, Right, Center, or Justified).

Text

Properties:

- **Text** - text to display.

- **Screen reader text** - the text that the user will hear when navigating to the text if a screen reader is enabled. This requires certain types of Qmatic certified hardware and the ADA keypad device.
- **Text color** - select the wanted color of the text here.
- **Font** - default is Arial, but other fonts may be added.
- **Align** - select if the text should be aligned Left, Right, Center or Justify.
- **Background color** - select the wanted background color here.

Image

⚠ Please note that rotation of for example images cannot be properly achieved in any layouts made with browsers IE7 / IE8. The rotation property is accessible but results will be unsatisfying.

Available for the following surfaces:

- Touch Screen
- Media Display
- Positional Display
- Ticket

Properties:

- **Image** - select a new image by clicking the Edit button. Accepted image formats are: jpg, jpeg, png and bmp. We recommend images with a transparent background.

⚠ For ticket layouts, it is only possible to add monochrome bitmap (bmp) pictures.

- **Keep image aspect ratio** - if this check box is checked, then the width and height of the image, i.e the relative horizontal and vertical sizes, are kept. For example, if a graphic has an aspect ratio of 2:1, it means that the width is twice as large as the height. When resizing graphics, it is important to maintain the aspect ratio to avoid stretching the graphic out of proportion.
- **Image scaling** - Center, Fill, Fit, or Stretch.

For more information, see “Available positions” on page 118.

Vertical Message

Area for a message managed with the Context Marketing application.

For more information, see “Context Marketing” on page 113.

Available for the following surfaces:

- Touch Screen

- Media Display
- Positional Display
- Ticket

ⓘ Keep in mind that for a good graphical result, the size of the vertical message area should correspond well to the size of the picture that is to be used in the Context Marketing application. The size of the vertical message area is adjusted in the bottom left area of the Surface Editor window (as with all other components):

Zoom		100%
Grid		10px
X: 50	W: 428	
Y: 650	H: 104	

Properties:

- **Background color** - select the wanted background color here.
- **Time to show** - the length of time that the vertical message should be shown. If the field is left empty, the vertical message is not removed.

Link

Available for the following surfaces:

- Touch Screen

Properties:

- **Text** - text to display.
- **Screen reader text** - the text that the user will hear when navigating to the link if a screen reader is enabled. This requires certain types of Qmatic certified hardware and the ADA keypad device.
- **Link to page** - link to another page. Select the page from a drop-down list.
- **Text color** - select the wanted color of the text here.
- **Font** - default is Arial, but other fonts may be added.
- **Background color** - select the wanted background color here.

URL

Available for the following surfaces:

- Touch Screen

Properties:

- **URL** - enter the wanted web address here.

Channel Player

Available for the following surfaces:

- Media Display
- Positional Display

The playlist for this area is set up in the playlist editor in the Context Marketing application.

For more information, see “Playlists” on page 117.

Properties:

- **Keep image aspect ratio** - if this check box is checked, then the width and height of the video, i.e the relative horizontal and vertical sizes, are kept. For example, if a video has an aspect ratio of 2:1, it means that the width is twice as large as the height.
- **Muted** - check this check box if you want the video to be muted.

ⓘ Keep in mind that for a good graphical result, the size of the channel player area should correspond well to the size of the video, link or image that is to be used in the Context Marketing application.

ⓘ For more information about accepted video, image and link formats, see “Accepted formats” on page 118.

Also see “Available positions” on page 118 for more information about suitable image positions in the **channel player** area.

Widget

For more information about widgets, please see the Widgets Guide.

Available for the following surfaces:

- Touch Screen
- Media Display
- Positional Display

ⓘ The properties depend on which widget you have selected. For a complete list and description of all available widget properties, please see the Widgets Guide.

Barcode

Available for the following surfaces:

- Ticket

Properties:

- **Barcode type** - select one of the following types: Interleaved 2/5, ITF-14, Code 39, Code 128, EAN 13 code, DataMatrix (square), DataMatrix (rectangular), and QR Code.
- **System information** - from a drop-down list, select which system information should be displayed (Custom parameter, Current time, Ticket id, Service name, Mobile Ticket URL, or Current date). If Custom parameter is selected, then a valid Custom parameter name string has to be entered in the field below. These strings are found in the unit type template of your printer in your equipment profile.
- Custom parameter name - used when Custom parameter is selected as System information. Device parameter strings are defined in the unit type template of the applicable printer. Example: The string **ticketCount** is used for Tickets left.
- **Calculate barcode checksum** - decide whether or not to use barcode checksum calculation. Note that checksums are not used for all barcode types!

ⓘ If you use a QR code and you have problems with the generated QR code on the ticket, it is probably because you have too much content in it. In that case we recommend that you increase the QR code size on the surface.

System Information

Available for the following surfaces:

- Ticket

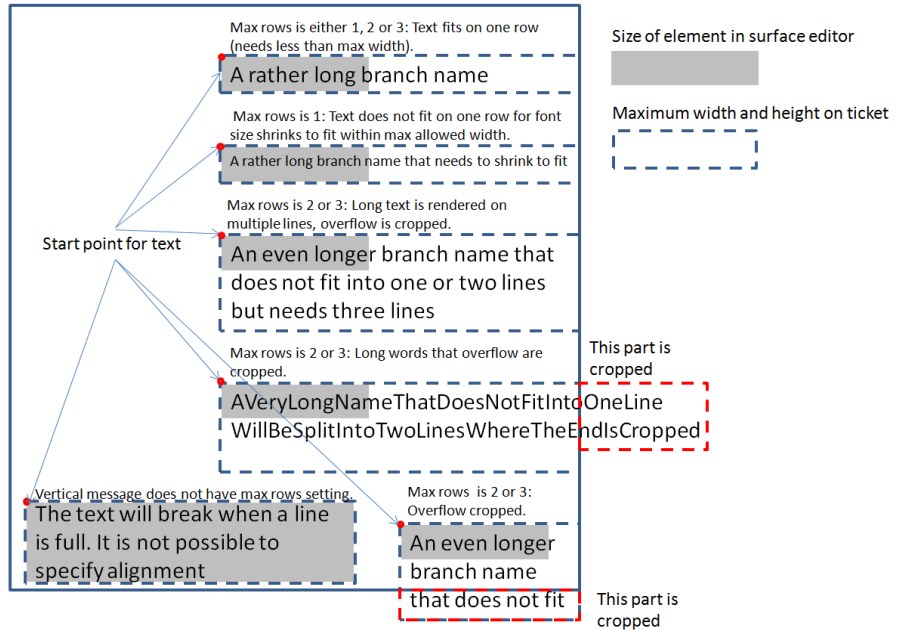
Properties:

- **System information** - from a drop-down list, select which system information should be displayed (Custom parameter, Current time, Ticket id, Service name, Mobile Ticket URL or Current date). If Custom parameter is selected, then a valid Custom parameter name string has to be entered in the field below. These strings are found in the unit type template of your printer in your equipment profile.
- **Custom parameter name** - used when Custom parameter is selected as System information. Device parameter strings are defined in the unit type template of the applicable printer. Example: The string **ticketCount** is used for Tickets left.
- **Font** - default is Arial, but other fonts may be added.
- **Align** - select if the text should be aligned Left, Right, Center or Justify.
- **Rotation** - from a drop-down list, select if the system information should be rotated 0, 90, 180 or 270 degrees.
- **Maximum rows** - only applicable for system information of type Custom parameter and Service name. From the drop-down list select **1**, **2**, or **3**. This defines how many rows the text, as a maximum, may stretch over. This is

especially useful, if you have very long service names, Branch names, or other custom system information.

The picture below illustrates how this would work in a ticket surface where the system information is left aligned and not rotated:

System information component rendering: No rotation and left alignment



So, if you, for example, select Maximum rows: 1 and the text is too long to fit in one row, then it will shrink to fit within the maximum allowed width. The text will however never be smaller than 6pt.

If you selected Maximum rows: 2 or 3, then long text is rendered on multiple lines and the overflow is cropped. In this scenario, long words that overflow will also be cropped, i.e they will not be hyphenated.

ⓘ Vertical messages do not have the Maximum rows setting.

- **Preview text** - here you can enter the wanted text and when you then Save and Preview your ticket surface you can make sure that the text looks as expected.

6. Context Marketing

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Introduction

 **IMPORTANT:** We recommend that you, after an upgrade, make sure that you clear the browser cache before using the *Context Marketing* application.

The *Context Marketing* application is used to manage messages (text, images, video etc.) displayed on surfaces such as touch screens, tickets, media displays and positional displays. It consists of three parts: Vertical messaging (managed in Message Editor) and playlists (managed in Playlist Editor) and Scheduler (for scheduling vertical messages and playlists).

The role *MarketingAdministration*.in Orchestra that is set-up for using these features,

Vertical Messaging

Vertical messaging is when you connect messages to a specific service. It can be commercial text, videos and images. You can have different messages for different surfaces, for example you may have one message on the printed ticket, and another one for the Counter application, which the staff member will see while serving the customer.

Using vertical messaging, you can present a consistent message to a customer on all information surfaces in the branch, associated with the specific service the customer has selected.

Example of vertical messaging:

- A customer enters the branch and chooses Service A on a kiosk.
- While the ticket is printed, the kiosk display a commercial text related to Service A
- Another text, related to Service A, is printed on the customer's ticket.
- When the customer is called to be served, the Counter application notifies the staff member that he or she should inform the customer about something related to service A, an offer or similar.
- Another customer arrives and chooses Service B, and get other messages, but at the same touchpoints.

Set up vertical messages

Vertical messages are set up in the tab Message Editor.

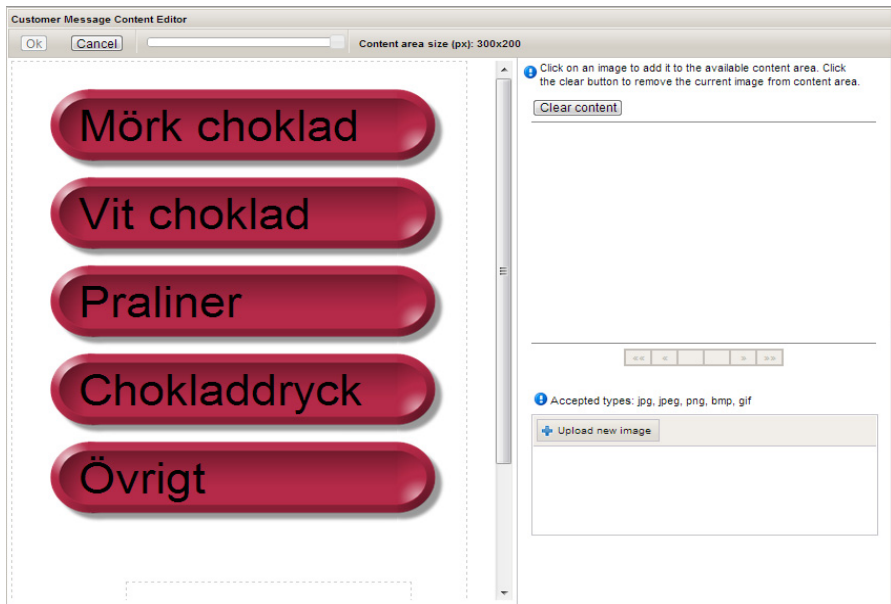
On all information surfaces that should be used for vertical messages, there must be areas inserted that will accept a message. These vertical message areas are managed with the Surface Editor. For more information, see "Surface Editing" on page 91.

When you open Message Editing, to the left is a list with all available messages. Click on a message to edit it.

To create a new message, click Create new Message and enter a name, and if you want to, add a description and a message icon.

Next, start editing messages for all available surfaces. If you don't see any surfaces, you need to create them in Surface Editor, and add the vertical message component.

When clicking a surface in this list, the edit page for that specific surface is opened, for example an Intro 8 touch screen.



To the left is the preview of the information surface with the vertical message area. To the right are the images that can be placed on the surface.

To upload a new image, click *Upload new image*. When the image is uploaded, click on it to insert it.

⚠ Keep in mind that for a good graphical result, the size of the vertical message area should correspond well to the size of the image that will be used.

For ticket surfaces, it is possible to select *Align Left* or *Align Right* for text that is entered.

Use the button *Clear content*, to remove an image from the surface.

Remember to save when you are done.

Playlists

Playlists can be shown on media displays or positional displays and are rolling lists of images, videos and links. The content of a playlist is displayed in the channel player area, which you add to your media displays or positional display surfaces in Surface Editor.

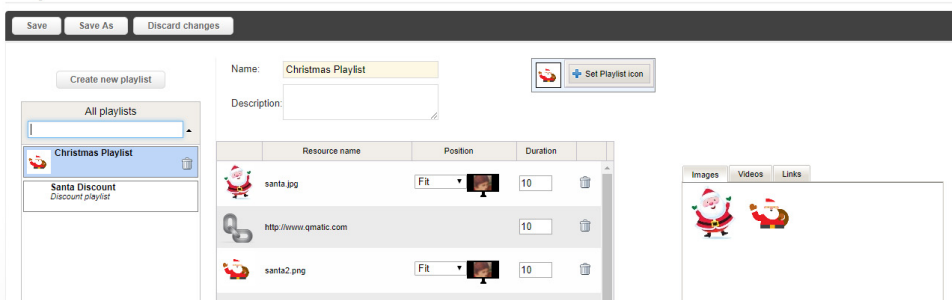
Set up playlists

Playlists are set up in the tab Playlist Editor.

On all media displays or positional displays that should be used to show images and videos, a channel play area must be inserted. This is done in Surface Editor, see “Channel Player” on page 129 for more information.

When you open Playlist Editor, to the left is a list with all available playlists. Click on a playlist to edit it.

Playlist Editor



To create a new playlist, click Create new Playlist and enter a name, and if you want to, add a description and a playlist icon.

To the right is a list of items (images, videos, links). To upload a new item, click the Upload button.

To insert an item, double-click it or drag and drop it into the list. The play order of items is changed by dragging and dropping in the list.

Set a position and a duration. For more information about the positions, see “Available positions” on page 137.

To remove an item from the Playlist, click on the recycle bin icon .

Remember to save when you are done. It is also possible to click Save As, if you for example want to create a similar playlist.

Playlist in playlist

It is also possible to insert a playlist into another playlist. Simply drag and drop the wanted playlist from the *All playlists* area to the left into the playlist.

❗ It is not possible to create a playlist that contains a playlist, which, in turn, contains the first playlist.

❗ If you are using an older Queue Agent, the playlist in playlist functionality is not supported. Nested playlists will be removed when publishing to the older Queue Agent.

Accepted formats

- For images: jpg, jpeg, png and bmp
- For video: ogg, ogv, webm and mp4
- For links: the link must start with http://

❗ Please note that for links the contents will not be displayed if the link is a redirected URL. Also, it is not possible to set how much of the URL that is actually displayed in the channel planner component.

❗ Due to safety regulations concerning https, there are problems with using http pages, such as Google, embedded in frames. If you want to use free standing https pages, please contact Support.

Available positions

The position of an item is set with the position drop-down menu in the middle of the row.

- For images: Centre, Fill, Fit and Stretch
- For videos: Centre and Fit
- For playlists nested in playlists, this is not applicable

Centre: No scaling or other change. If the image is smaller than the area, borders are inserted around the image. If the image is larger than the area, only the centre of image is in view.

Fill: Aspect ratio not changed. Scale to fill the whole area and centring, thus parts of the image are out of view.

Fit: Aspect ratio not changed. Scale to have the whole image in the area, thus borders are inserted where necessary.

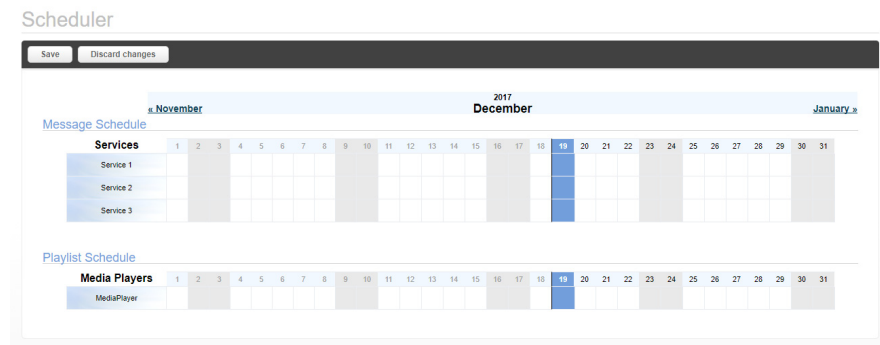
Stretch: Stretch and shrink so that the image fills the area completely and nothing is outside the area.

Schedule messages and playlists

Vertical messages and playlists are scheduled in the tab Scheduler.

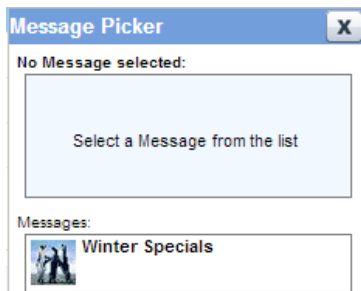
With the scheduler, messages and playlists are assigned to services and displays (media players) and scheduled. Therefore, it is easy to get an overview of the timing of both messages and playlists.

When you open the scheduler, it displays a separate calendar of the current month for services and media players. You can go to the previous or next month by click on the links.



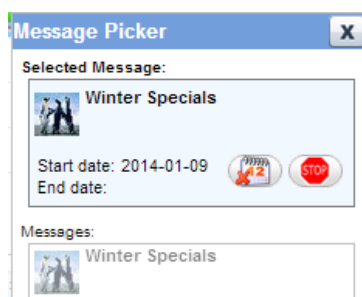
Messages

Schedule a message for a specific service by clicking the start day in the row for the service. Select a message from the list.



A green arrow is inserted in the calendar, from the start date to the end of the calendar.

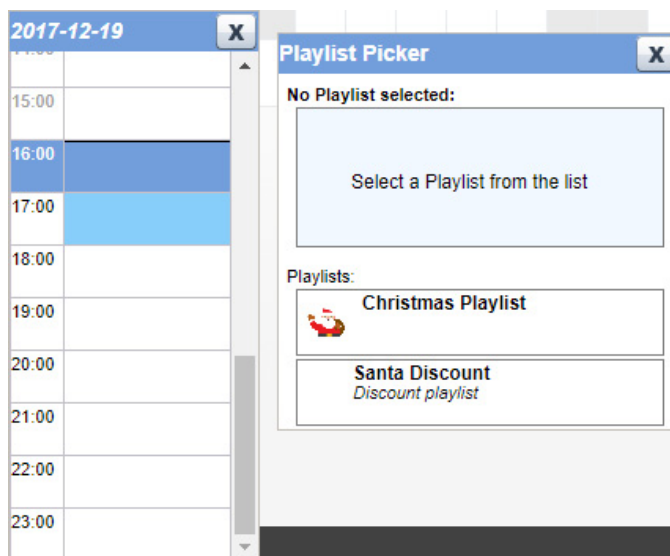
Set the end date by clicking on another date in the row, and then clicking *Stop*. You can also remove the message (unschedule it) select another message from the message picker and it will be scheduled from that date instead.



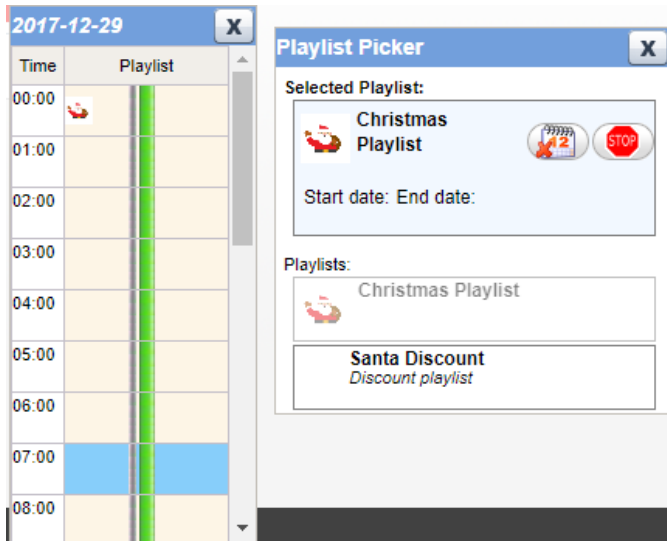
Remember to save all changes.

Playlists

Schedule a playlist by clicking the start day in the row for the display. Select a start time and then a playlist from the list.



To set an end date / time for the schedule, click the wanted date and time and then click the *Unschedule* icon to remove the schedule completely, or the *Stop* icon to set that date and time as the end of the schedule. Alternatively, select another Playlist from the list of Playlists and it will be scheduled from that date/time instead:



ⓘ The playlist which is scheduled over midnight will be the playlist used for the following day. Scheduling a playlist for the *current* day requires it to have start time 00:00.

Remember to save all changes.

Weekend days

The days of the week that are marked as weekend days are defined in *Weekend Settings*, in the *Parameters* tab in the *System Administration* application. For more information, see the Reference Manual.

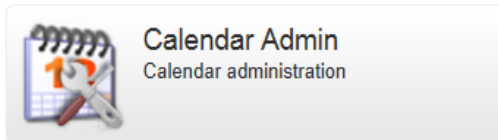
7. Calendar

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Introduction

The Calendar is administrated in the *Calendar Admin* application, which is accessed by clicking on the following button in the Qmatic Orchestra *Home* page:



The following can be set up:

- Branches
- Services
- Resources
- Week Schedules
- Appointment Profiles
- System Settings

These are described in more detail below.

Definitions

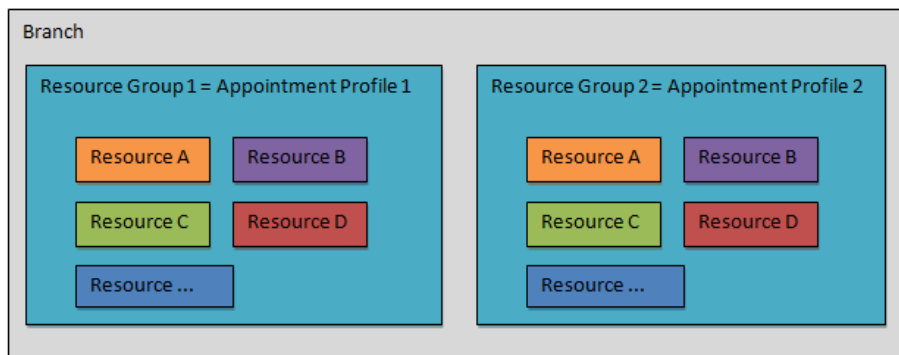
Resource

Represents an entity (staff member/room/item/etc) for which Appointments can be booked. A Resource can be used over multiple Branches, by assigning it to the relevant Resource Groups.

Resource Group

A group containing one or more Resources and having the Services assigned that can be booked for these Resources. A Resource can be a member of one or multiple groups. The Resource Group usually corresponds to the Appointment Profile. A Resource Group is related to one Branch.

These terms are illustrated in the picture below:



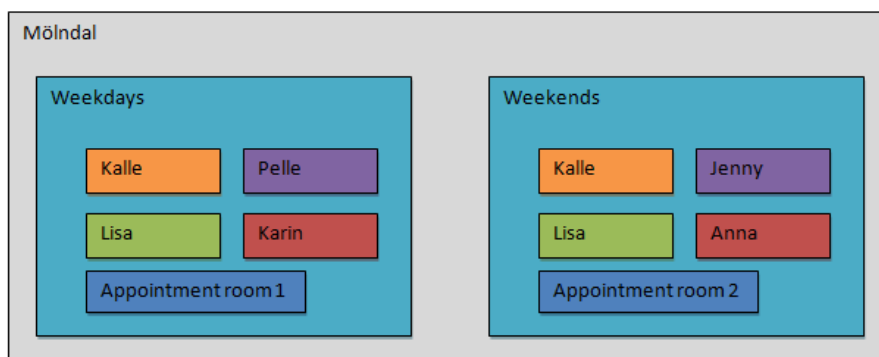
Example

With the definitions above in mind, let us go through an example of what it may look like in a real situation.

As the following picture illustrates, the Branch *Mölnadal* has two Resource Groups, one for *Weekdays* and one for *Weekends* (which are covered by corresponding Appointment Profiles). These two Resource Groups both have five Resources, two of which, staff members *Kalle* and *Lisa*, are members of both Resource Groups.

So, when Appointments are to be booked, it would be possible to, for example, book *Pelle* OR *Appointment room 1*, during the hours specified in the *Weekdays* Week Schedule/Appointment Profile. During the hours covered by the *Weekends* Week Schedule, I might suggest you book *Jenny* OR *Appointment room 2* instead.

⚠ Please note that it is *not* possible to book two Resources for the same Appointment!



Configure the Calendar Business Rules for Public API Bookings

The Calendar Administration allows users to set up booking rules, which will determine which dates and time slots that are shown as bookable for a given Service on a Branch. The business logic driving the booking process is backed by a number of participating entities - Branch, Services, a Week Schedule, Resources and properties such as expected service length and existing Appointments for a given Resource.

The Appointment Profile is what links a Branch and one or more Services together, specifying which set of Resources that should be bookable on the Branch through a Resource Group, which Week Schedule these Resources are made bookable on and the Appointment Profile also specifies the bookable period in days from now, the starting interval of a new Appointment (every Nth minutes) and the booking threshold percentage.

Due to the relative complexity of these business rules, we will try to divide it into smaller pieces in the context of a Booking workflow through the Public API:

1. Select Branch.
 - a All Branches having an Appointment Profile with at least one linked Service, a Week Schedule and a Resource Group with at least one member are listed.
2. Select Service for Branch.
 - a All Services marked as public bookable and enabled that are linked to an Appointment Profile on the selected Branch are listed.
3. Select date.
 - a Return a list of bookable dates where the selected Service on the selected Branch can be served according to a number of rules:
 - i There must be at least one bookable duration of time for each returned date
 - ii The "duration" is read from the Service, for example 10 minutes.
 - iii The Week Schedule is taken into account, for example 09:00 - 10:00
 - 1 The day of week must be marked as working day and bookable in the Week Schedule.
 - 2 A Week Schedule day may have one or more 'blocks' during the day. For example, a block could exist between 09:15 - 09:30 due to the daily coffee break.
 - iv The "interval" is read from the Appointment Profile, for example 10 minutes giving possible starting times at 09:00, 09:10, 09:20, 09:30, 09:40 and 09:50.

-
- v There must be at least one Resource associated to a Resource Group on one Appointment Profile linked to the Branch that serves the selected Service. For example, we could have a single Resource named 'R1' fulfilling these criteria.
 - 1 Any existing Appointments associated to a Resource may NOT overlap a possible time slot during the bookable period. For example, our 'R1' could have an existing Appointment 09:40 - 09:50.
 - vi In the example above, we would have bookable time 09:00 - 09:15, 09:30 - 09:40 and 09:50 - 10:00 given that the time slot may not overlap 09:15 - 09:30 or 09:40 - 09:50
 - 1 Since we have an "interval" of 10 minutes and a Service duration of 10 minutes, the existing blocks and Appointment for 'R1' will result in the following bookable time slots:
 - a 09:00 - 09:10, 09:30 - 09:40, 09:50 - 10:00
 - 2 If we would change the "interval" to every 5 minutes, we would instead have the following possible bookable time slots:
 - a 09:00 - 09:10, 09:05 - 09:15, 09:30 - 09:40, 09:50 - 10:00.
 - 3 If we would change both the "duration" and "interval" to 5 minutes, the following slots would be available
 - a 09:00 - 09:05, 09:05 - 09:10, 09:10 - 09:15, 09:30 - 09:35, 09:35 - 09:40, 09:50 - 09:55, 09:55 - 10:00
 - 4. Select time slot of date.
 - a Given that at least one time slot was returned for the "date available" analysis, that date is eligible for booking. In this step we would present all time slots for the selected date, using exactly the same slot resolution logic as in section (vi) above.
 - 5. Book
 - a After entering customer details, the call to the book method with a specified date and time will create the Appointment for the Resource selected according to the Appointment Profile's booking threshold percentage. (See "Booking logic" on page 161.)

Branches

In the *Branches* page, all the available Branches are listed:

Branches

Create a new branch Fetch								Actions
#	Name	Branch Info				Phone		
1	Examenccentrum Leiden	Address Smaragdlaan 99A 2332 JP, Leiden				email Time Zone Geo Location	Europe/Amsterdam	✖ Delete
2	Examenccentrum Rijswijk	Address Lange Kleisweg 30 2239 GK, Rijswijk				email Time Zone Geo Location	Europe/Berlin	✖ Delete
3	Examenccentrum Haarlem	Address Professor Eijkmanlaan 2-4 2035 AB, Haarlem				email Time Zone Geo Location	Europe/Amsterdam	✖ Delete

Branches in Calendar vs in Qmatic Orchestra Central

The Calendar in Qmatic Orchestra keeps its own Branch objects. Typically, you as an administrator must assign the relevant Branch(es) to a Branch Group, such as *Regions*, in the *Branch Hierarchy* page of the *Business Configuration* application. Also, the *calendar* user must have access to that Branch Group, in the Branch Hierarchy.

For more information, see “Branch Hierarchy” on page 86 and “Users” on page 39.

The *Fetch* button, Fetch, is then used to fetch the Branch settings from Orchestra Central to the Calendar.

To delete a Branch, simply click the delete button, ✖ Delete, in the *Actions* column.

By clicking on the wanted Branch row, you can edit the Branch information in the *Edit Branch* window, which is the same as the *Create Branch* window:

Edit Branch

General Settings Custom Settings

Name: Examencentrum Leiden

Address: Smaragdlaan 99A

Zip/Postal Code: 2332 JP

City: Leiden

Country: Country

Phone: Phone

email: email

Time Zone: Europe/Amsterdam

Geo Location: Longitude

Latitude

Public Id: aff7ba7f420634b568b80042cee48596874f

Orchestra Branch Id: 1

Save changes Cancel

There are two tabs: *General Settings* and *Custom Settings*. In the *General Settings* tab, the following information is entered:

- *Name* - name of the Branch.
- *Address* - street address of the Branch.
- *Zip/Postal Code* - zip/postal code of the Branch.
- *City* - city where the Branch is located.
- *Country* - country where the Branch is located.
- *Phone* - phone number to the Branch.
- *email* - email address to the Branch.
- *Time Zone* - select the applicable time zone, from the drop-down list.
- *Geo Location* - geographical location (latitude/longitude) of the Branch.
- *Public Id* (not available in the *Create Branch* window) - a 64 character identifier, used by the Public Booking API.
- *Orchestra Branch Id* - the Id that is used for the Branch in Qmatic Orchestra.

For more information, see "Q: What are those "Orchestra Branch Id" and "Orchestra Service Id" fields?" on page 166.

In the *Custom Settings* tab, you can enter specific, customised information.

Services

In the *Services* tab, all available Services are listed:

Services

Create new Service		Fetch	Search				
#	Name	Active	Duration	Additional customer duration	Orchestra Service Id	Enable public booking	Actions
2	Skirts	✓	20	0	2	✓	
5	Suits	✓	40	0	5	✓	
3	T-shirts	✓	10	0	3	✓	
1	Trousers	✓	20	0	1	✓	
4	Underwear	✓	30	0	4	✓	

Services in Calendar vs in Orchestra Central

The Calendar keeps its own Service objects. Typically, you as an administrator must make sure that the applicable Service(s) are used in a Queueing Profile in Qmatic Orchestra. Also, the check box *Booking enabled* must be checked for the relevant Service(s), in the *Business Configuration* application.

For more information, see “Services” on page 87.

The *Fetch* button,  , is then used to fetch the Service settings from Qmatic Orchestra to the Calendar.

ⓘ There is a setting in the *System Settings* tab where you can disable the synchronization of Services.

To delete a Service, simply click the delete button,  , in the *Actions* column.

To create a new Service, click the *Create new Service* button and the following window is opened:

Here you enter the following information:

- **Name** - name of the Service.
- **Enabled** - check this check box to make the Service enabled.
- **Duration** - enter the default duration of the Service, in minutes.
- **Additional customer duration** - enter additional duration in minutes here.

For more information about how Additional customer duration works, see “Q: How does the “additional customer duration” on the Service work?” on page 165.

- **Orchestra Service Id** - the Id that is used for the Service in Qmatic Orchestra.

For more information, see “Q: What are those “Orchestra Branch Id” and “Orchestra Service Id” fields?” on page 166.

- **Enable public booking** - check this check box to make the Service available for public booking.

If you instead click on the wanted Service in the list, you will open a window where you can edit the Service. This window is the same as the *Create new Service* window, with the exception that you can also see the *Public Id* of the Service in the *Edit Service* window. *Public Id* is a 64 character identifier, used by the Public Booking API.

Resources

In the *Resources* tab, all available Resources are listed, with their *Name* and their *Color* (which is displayed in the Calendar view):

Resources

Create New Resource			
#	Name	color	Actions
1	Examen tafel 1		 Delete
2	Examen tafel 2		 Delete
3	Examen tafel 3		 Delete

To delete a Resource, simply click the delete button,  **Delete**, in the *Actions* column.

To edit a Resource, simply click on the applicable row in the list. To create a new Resource, click the *Create New Resource* button and the following window is opened:

Edit resource

Name

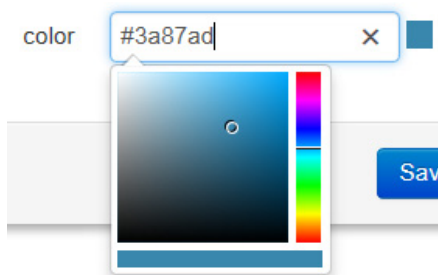
Color

Save changes

Cancel

Here, you enter a *Name* for the Resource as well as the wanted *Color*, defined by its color hex code. When you click in the *color* field, the following color palette, where you can select the wanted color, will be opened:



Week Schedules

❗ The Week Schedule set up here is only used for the Public Booking API.

For more information, please see various questions in the “FAQ” on page 164.

To change the start and end time for the calendar in your *Calendar Client* application, however, you need to follow these steps:

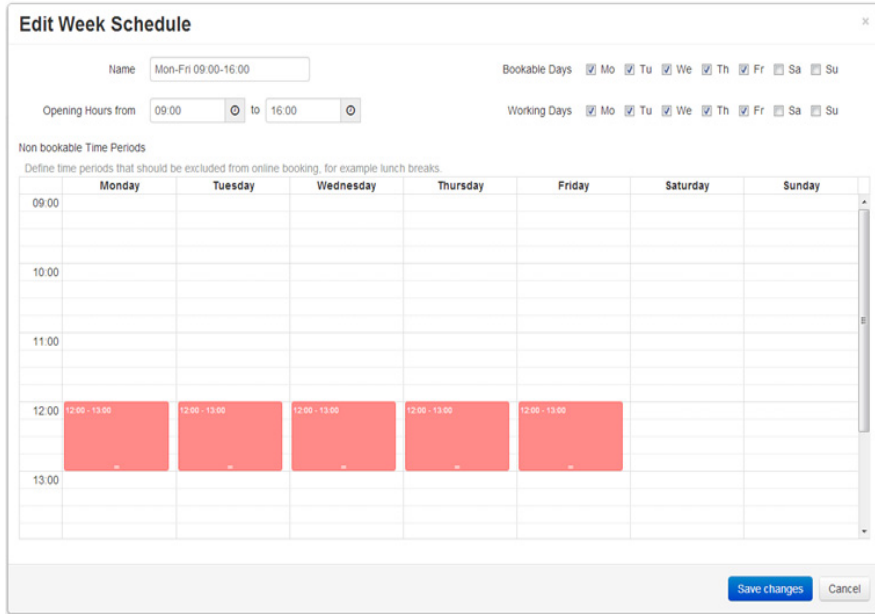
1. Undeploy *calendar-client.war* in the Jboss Admin application.
2. Unpack it, to a folder called *calendar-client.war*, in a suitable location (for example a *temp*-folder).
3. Next, open up the *config.js* file, found in the *calendar-client.war* folder, and define the wanted start and end time in the file.
4. Then, **move** the folder to the *custdeploy* folder of your Qmatic Orchestra installation, so that it will be deployed again.

In the *Week Schedules* tab, all available week schedules are listed:

Create New Week Schedule						
#	Name	Opening Time	Closing Time	Bookable Days	Working Days	Actions
1	Mon-Fri 09:00-16:00	09:00	16:00	☑☑☑☑☐	☑☑☑☑☐☐	✖ Delete

To delete a Week Schedule, simply click the delete button, [✖ Delete](#), in the *Actions* column.

To edit a Week Schedule, simply click on the applicable row in the list. To create a new Week Schedule, click the *Create New Week Schedule* button and the following window is opened:



The 'Edit Week Schedule' window contains the following fields and controls:

- Name:** A text input field with the value 'Mon-Fri 09:00-16:00'.
- Bookable Days:** A row of checkboxes for days of the week: Mo, Tu, We, Th, Fr, Sa, Su. Mo, Tu, We, Th, and Fr are checked.
- Opening Hours:** Two time input fields. The first is '09:00' and the second is '16:00', separated by a 'to' label.
- Working Days:** A row of checkboxes for days of the week: Mo, Tu, We, Th, Fr, Sa, Su. Mo, Tu, We, Th, and Fr are checked.
- Non bookable Time Periods:** A section with the instruction 'Define time periods that should be excluded from online booking, for example lunch breaks.' Below this is a calendar grid with columns for Monday through Sunday and rows for time slots from 09:00 to 13:00. Red blocks are present in the 12:00 - 13:00 slot for Monday through Friday.
- Buttons:** 'Save changes' and 'Cancel' buttons at the bottom right.

Here, you enter a *Name* for the Week Schedule, select the wanted *Bookable days* and *Working days*, enter the *Opening Hours* as well as mark the times in the calendar that should be *Disabled time periods*.

Appointment Profiles

In this tab the available Appointment Profiles are listed, when you click on the wanted Branch in the list to the left:

Branches

- Examencentrum Leiden
- Examencentrum Spings
- Examencentrum Haarlem

Appointment Profiles

[Create New Appointment Profile](#)

#	Name	Services	Resource Group	Week Schedule	Actions
1	Theorie-examen	Theorie-examen Auto Theorie-examen Bromfiets Theorie-examen Motor	Examen Zaal	Mon-Fri 09:00-16:00	+ Details

Resource groups

[Create New Resource Group](#)

#	Name	Members	Actions
1	Examen Zaal	Examen tafel 1 Examen tafel 2 Examen tafel 3	+ Details

⚠ At least one Resource Group must be created before it is possible to create a new Appointment Profile.

The procedure for creating a new Resource Group is described in “Resource Groups” on page 154.

To create a new Appointment Profile, first select the applicable Branch from the list to the left. Then, click the *Create New Appointment Profile* button. The following window is displayed:

Edit Appointment Profile ✕

Name

Services

Theorie-examen Auto
Theorie-examen Bromfiets
Theorie-examen Motor

Resource Group

Week Schedule

Allow booking days
 minutes from now

for a period of days

Slot interval minutes

Booking Threshold %

[Save changes](#) [Cancel](#)

Here, you enter/select the following information:

- **Name** - name of the Appointment Profile.
- **Services** - Which Services that should be included in the Appointment Profile.

For more information, see “Services” on page 148.

To select several Services, hold down the *Ctrl* key while selecting the wanted ones. To select all Services, mark the top one, hold down the *Shift* key and mark the bottom one.

- *Resource Group* - select the wanted Resource Group from the drop-down list.

For a description on how to create Resource Groups, see “Resource Groups” on page 154.

- *Week Schedule* - select the wanted Week Schedule from the drop-down list.

For more information, see “Week Schedules” on page 151.

- *Allow booking <n> days, <m> minutes from now* - number of days and minutes from now that booking should be allowed.

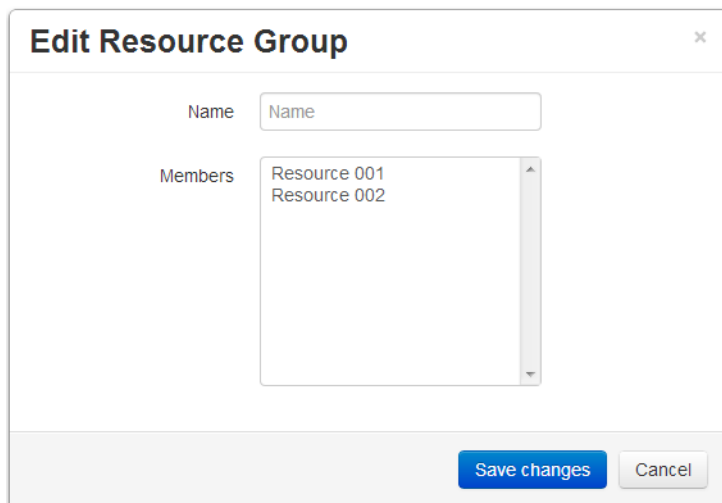
For more information, see “Q: How does the “Allow booking N days M minutes from now for a period of NN days” work?” on page 167.

- *for a period of <nn> days* - maximum number of days that booking should be allowed for. Note that this parameter cannot be set to 0!
- *Slot interval <m> minutes* - number of minutes that should be included in the time slot for the Appointment Profile.
- *Booking Threshold <p> %* - The meaning of this setting is how fully booked Resource 1 must be, before Resource 2 is opened up.

For more information, see “Booking logic” on page 161.

Resource Groups

To create a new Resource Group (with one of the Branches selected, in the list to the left), click the *Create New Resource Group* button.



The image shows a dialog box titled "Edit Resource Group" with a close button (X) in the top right corner. Inside the dialog, there is a "Name" label followed by a text input field containing the word "Name". Below this, there is a "Members" label followed by a list box. The list box contains two items: "Resource 001" and "Resource 002". At the bottom right of the dialog, there are two buttons: "Save changes" (in blue) and "Cancel" (in grey).

Enter the *Name* of the Resource Group and select the resources that shall be *Members* of the group from the list.

To delete an Appointment profile or Resource group, simply click the *Delete* button, , in the *Actions* columns.

System Settings

ⓘ You need to restart Qmatic Orchestra after changing these settings.

In this tab you configure the settings needed to synchronize the *Calendar* application with Qmatic Orchestra. You also configure the Online Booking settings, Appointment removal settings, Appointment locks settings, as well as the Audit settings.

Qmatic Orchestra Synchronization Settings

Orchestra Synchronisation Settings

Username	calendar
Password	Password
Disable Orchestra service synchronisation	☐
Unique customer identifier field	[cardNumber] Card Number

The following settings are available in this section:

- *Username* - default is *calendar*.
- *Password*
- *Disable Orchestra service synchronization* - this setting will prevent Service name and duration to be updated from Qmatic Orchestra when the server is restarted or the *Fetch* button is clicked in the *Services* tab. If the Service does not exist in the Calendar, it will be synchronised from Qmatic Orchestra. By default, Service synchronization is enabled.
- *Unique customer identifier field* - from the drop-down list, select one of the following: *Card Number*, *Custom field 1-5*.

Online Booking settings

Online Booking settings

Reservation Expiry Time	600	seconds
Unique customer identifier field	[externalId] External ID	
Pre-populate appointment data on startup	☐	
Enable custom slot length	☐	
Minimum slot length in minutes	1	
Maximum slot length in minutes	480	
Calculate slots after capacity blocks	☐	

The following settings are available in this section:

- *Reservation Expiry Time* - the default value is 600 seconds.
- *Unique customer identifier field* - from the drop-down list select one of the following: *Public ID*; *Email Address*; *Phone Number*; *Identification Number*; *External ID*.
- *Pre-populate appointment data on startup* - If set to true, the Calendar back-end will, on start-up, attempt to load cacheable data for Appointments and Blocking Appointments. The data loaded will be defined by which Appointment profiles and which Services are available on each Branch. This pre-fetch is done to prevent the potentially long initial load times the first time e.g. "get available dates for Branch and Service" is called. Default: *false*.
- *Enable custom slot length* - If this check box is checked, the custom slot length feature is enabled, which means that there is a possibility to supply a

pre-calculated slot time, instead of letting Qmatic Orchestra calculate the time. If this check box is checked, the two fields below are enabled. Default: *false*.

- *Minimum slot length in minutes* - Default: 1 minute.
- *Maximum slot length in minutes* - Default: 480 minutes.
- *Calculate slots after capacity blocks* - If checked, calculation of available time slots is done after capacity blocks, i.e. if there is a capacity block partly or wholly blocking a time slot interval, the next available time will be calculated at the end of the capacity block instead of at the start of the next time slot interval. For example, if there exists a schedule with opening hours from 08:00-15:00 and with a capacity block from 12:00-13:00, and slot interval and service duration is 2 hours, the available times will be 08:00, 10:00 and 13:00. If the setting is disabled, on the other hand, the available times will be 08:00 and 10:00 since the time slot interval from 12:00-14:00 is blocked by the capacity block. Default: *false*.

High Availability settings

High Availability settings

Pre-populate ☐
appointment periodically

Periodical appointment minutes
data pre-population
interval

The appointment cache, blocking appointment cache and resource cache of subsystem Calendar Backend can be configured to be periodically refreshed on the High Availability node that is in the cold (passive) state. This is to prepare that node to be ready to take over as hot (active) node.

Both nodes are cold from start-up of Qmatic Orchestra. The node that is used for Calendar bookings will become hot.

The following settings are found here:

- *Pre-populate appointment periodically* - Enable periodic cache refresh. Default disabled.
- *Periodical appointment data pre-population interval* - Change the interval for periodical appointment data pre-population. Default 60 minutes.

Appointment removal settings

Appointment removal settings

Delete appointments
older than number of
days

Here, you can configure the following:

- *Delete appointments older than number of days* - here you enter the number of days after which the Appointments should be deleted from the *qp_calendar* database. The default value is 90 days.

Appointment locks settings

Appointment locks

Maximum number of
locks for each user

Number of minutes
before a lock times out

Here, you can configure the following:

- *Maximum number of locks for each user* - here you enter a number between 1 and 10 for how many locks the same person may have, in parallel. Default is 1.
- *Number of minutes before a lock times out* - enter the wanted number of minutes before the lock is automatically timed out (the Appointment is no longer locked. Default is 10. (Minimum 1, maximum 120).

ⓘ This feature is currently only available via the Calendar backend.

Calendar client settings

Calendar Client settings

Enter an hour according to the 24-hour clock system

Start time in Calendar Client

End time in Calendar Client

First visible hour in Calendar Client

Here, you can configure how the calendar view should be setup in Calendar Client:

- Start time in Calendar Client - The first hour that should be available to make appointments for
- End time in Calendar Client - The last hour that should be available to make appointments for
- First visible hour in Calendar Client - The hour that should be shown on top when opening Calendar Client.

Audit settings

Audit settings

Audit blocking appointments ☒

Here, you can configure the following:

- *Audit blocking appointments* - when this check box is checked, it will be logged in the Calendar audit functionality, when so called Blocking Appointments are created or edited. Blocking Appointments are used to block the possibility to book an Appointment for a certain Resource, during a certain point in time. By default this is logged.

Browser settings

Browser settings

Use the HttpOnly cookie flag ☐

Use the Secure cookie flag ☐

Here, you can configure the following:

- *Use the HttpOnly cookie flag* - Cookies with HTTP only flag set to true indicates that the cookie shall only be accessed from server side and not application running in the browser.

ⓘ Qmatic Orchestra needs to be restarted after this setting has been enabled.

- *Use the Secure cookie flag* - A secure flag set to true on a cookie indicates that the cookie must be sent over a secure communication, such as HTTPS.

ⓘ Qmatic Orchestra needs to be restarted after this setting has been enabled.

When done, click *Save changes*.

Booking logic

How does the resource selection and presentation of available dates/timeslots actually work?

The default behaviour of the Calendar Booking Logic is to use a fill-resource-to-threshold logic which works in the following way:

Given that you have three Resources for a given Branch and Service and these three are bookable etc, the system will fill them one by one until a set percentage of the time slots of that Resource has been booked.

Consider the following example:

- Calendar Capacity Day Monday, 09:00-10:00.

- Booking interval 10 minutes.
- The Service duration is 10 minutes.

That gives 6 bookable slots per Resource and day. The system returns bookable timeslots for Resource(s) that are:

- Booked above the threshold %
- The Resource with the highest booked % below the threshold.

With a 75% threshold:

- If no Appointments are booked for the given day, the first Resource's slots will be displayed, e.g: 09:00,10,20,30,40,50.
- Two slots are booked, let's say 09:20 and 09:50. 2 of 6 slots are occupied (33%) and the four remaining slots of that Resource will thus be displayed: 09:00,10,30,40.
- Three more slots are booked, let's say 10,30,40. That leaves only the slot at 09:00 free. This means Resource 1 has 5 of 6 slots booked (83%) and the system will open up Resource 2's slots as well. E.g. 6 slots will be displayed: 09:00,10,20,30,40,50.
- If the next booking is for 09:00, which is free at both Resource 1 and 2, the Resource with the highest booking % will be selected. In this case, Resource 1.
- After the last booking, there are still 6 slots available. Resource 3 will not be made bookable until Resource 2 has > 75% (5 of 6) slots booked.

ⓘ If any resource has blocking appointments (see below), they will always be selected last as candidates for booking. The reason for this is to maximize the no of slots available for booking. A resource with blocking appointments will have fewer time slots available than a resource with no blocks.

Blocking Appointments

In addition to adding certain disabled times in the Week Schedules, it is possible to create synthetic Appointments as “Blocking Appointments”.

These Appointments are not made for serving a Customer, but are instead made to indicate that the time slot is occupied.

Blocking Appointments will only affect the Public Booking API. Bookings via the *Calendar client* will still be possible, as that one allows multiple bookings per time slot.

The main difference between doing this via a Blocking Appointment and setting it in the Week Schedule is that the Week Schedule always blocks out those slots, for all weeks in the future, whereas a Blocking Appointment will only block that time for the specific day.

A Blocking Appointment is defined as having a status of > 999 or the blocking flag set to true.

Three kinds of blocks can be made:

- A Blocking Appointment that has no Branch set - this will block all resources across all Branches for that specific time period.
- A Blocking Appointment that has Branch, but not resource, set - this will block all resources for the specified Branch for that specific time period.
- A Blocking Appointment that has Branch and resource set - this will block the particular resource for that specific time period.

ⓘ Note that if the resource is tied to multiple Branches (see sections on Appointment Profiles and Resource Groups) it will still be blocked in all Branches.

Blocking Appointments can be done on resource level through the *Calendar client* application.

For blocks on Branch or Global level, the Calendar API must be used, please see the SDK documentation.

Blocking Appointments will never be sent to central Qmatic Orchestra, so they will not be able to be used for e.g. creating Visits and similar.

Their primary function is to allow more fine-grained control of resource availability.

FAQ

Q: How is the Week Schedule open hours used?

A:

The time slots returned by the Public API will always be between the start and end time for the given date. The end time of an Appointment booked through the Public API will not be after the Week Schedule end time. For example, with a Week Schedule from 09:00 - 16:00 and a Service length of 15 minutes, the last possible timeslot that would be made available through the public API would be 15:45 - 16:00.

Q: Why is there a difference in Week Schedule open hours and Branch open hours?

A:

The Branch open hours is typically used for informational purposes about the general operating hours of a Branch. The Week Schedule is exclusively about when the Branch will accept Appointment bookings. An example could be a Branch that during a few hours each day accepts "drop in" customers and during these hours the staff should not be occupied with pre-booked Appointments.

Q: How do we change calendar open hours?

A:

The week schedule(s) are associated to a Branch through an Appointment Profile created for a given Branch. It is possible to have many Appointment Profiles for a given Branch and each Appointment Profile can specify a different Week Schedule than the other Appointment Profiles. If your enterprise has several Branches, where one or more needs to have their own bookable hours, it is just a matter of creating an alternate Week Schedule and then changing the selected Week Schedule in the Appointment Profile of the given Branch.

Q: My Week Schedule is between 09:00 - 17:00, but I can still create Appointments using the Calendar View outside of this time period. Why?

A:

Week Schedules are only enforced for bookings done through the Public API, including presenting available timeslots for a given date etc.

Q: My Resource R1 is already booked between 12:00 - 13:00. But R1 is still selectable when I try to create an Appointment using the Calendar View at that date and time. Why?

A:

Existing Appointments for a given Resource is only taken into account when bookings are done through the Public API. The Calendar View allows double-booked Resources.

Q: I have placed a 'Block' every day between 12-13 for lunch in my Week Schedule. I can still create Appointments through the Calendar View between 12-13. Why?

A:

Week schedule Blocks are only enforced for bookings done through the Public API, including presenting available timeslots for a given date etc. The Calendar View allows bookings at any time or date as it is only used by internal staff members.

Q: How does the "additional customer duration" on the Service work?

A:

In the context of bookings made through the Public API, each additional customer on an Appointment may increase the total free time required for a Resource in order for it to be eligible for an Appointment. If your Service is "passport applications" you may allow an Appointment to be made for several customers on a single Appointment, a family for example. Since accepting passport applications for several people probably consumes more time than for a single person, the calendar administrator can specify the number of additional minutes per extra customer on the Appointment. So if we have a default 5 minute duration and an extra 3 minutes per additional customer, the total required duration for a family of four members would be $5+3+3+3 = 14$ minutes. 5 minutes for the 1st person and three x 3 minutes for the additional three family members. This means that in the context of a booking through the Public API for this family, a free time slot of at least 14 minutes would be required on an applicable resource. So if the last available time for a given Resource were 15:45 - 16:00, that 14 minute Appointment would fit into the last slot and a booking would be possible, but with one more customer on in (for a total of 5), the required time would be 17 minutes and an Appointment will not be possible to create since it would end at 16:02.

Q: What's the purpose of the color specified on the Resource?

A:

Appointments are color-coded in the Calendar View according to their associated Resource.

Q: In the Week Schedule, what's the difference between "Bookable Days" and "Working Days"?

A:

In order for a day to be bookable through the Public API, both 'Bookable' and 'Working day' must be checked. The separation into two fields are for future-proofing purposes where we may introduce more fine-granularity into scheduling.

Q: Can I change that 64-character long "publicId" on Branches and Services?

A:

Yes, you can change them to something else, just make sure they have not been stored as identifiers in an external system or perhaps used in emailable links sent to customers or similar.

Q: What are those "Orchestra Branch Id" and "Orchestra Service Id" fields?

A:

They are used to map Branch and Service objects to their logical counterparts inside Qmatic Orchestra. Typically, they are populated when using the *Fetch* button but in case you create a Service manually you will need to map it to an Qmatic Orchestra Service if you want the Appointment to be synced over to Qmatic Orchestra from the Calendar.

You perform the mapping by entering a number into the *Orchestra Branch Id*/*Orchestra Service Id* field in the *Edit Branch/Edit Service* window. This number must be the same as the primary key of the Branch/Service in Qmatic Orchestra, e.g. qp_central.branches/qp_central.services table.

You can also determine this number by opening the Orchestra *Business Configuration* application, go to the *Branches/Services* list and select a Branch/Service, which opens the *Edit* window. In the browser's URL field, you should then see something like:

`http://<ORCHESTRA_IP>:8080/qs/system/system-web/#Branches:edit:branch=2`

or:

`http://<ORCHESTRA_IP>:8080/qs/system/system-web/#Services:edit:service=1`

The last segment, "branch=[N]" or "service=[N]" identifies the primary key of the Branch/Service in Qmatic Orchestra.

However, typically you should use the *Fetch* button which fills in this information for you automatically.

Q: Can a Resource be member of several Resource Groups?

A:
Yes.

Q: If a Branch has several Appointment Profiles, how is the Public API time slot evaluation affected?

A:
Time slots are evaluated on a per Appointment Profile basis where the final result is stored in a unique set of HH:mm values.

Q: How does the "Allow booking N days M minutes from now for a period of NN days" work?

A:
This only applies to the Public API - it affects the base date range from which bookable dates and timeslots will be evaluated. For example, if the current date and time is 2014-06-06 11:00 (a Friday), we have a 09:00 - 17:00 Week Schedule from Monday-Friday and we have specified 1 days, 0 minutes from now and 14 days as the period - the first bookable day will be Monday the 9th since neither the Saturday or Sunday is bookable. Then, the next Mon-Fri for 14 calendar days will be bookable, meaning that the last bookable date in the period will be 2014-06-20 (the 22nd is a Sunday). If the *Allow booking* would be 0 days and 120 minutes, it would mean the first bookable slot would be at 2014-06-06 13:00 and the last one would be 2014-06-20.

Q: How do I configure customer identification?

A:
By default, the Qmatic Orchestra Calendar will map the 'externalId' field on the Customer object to the 'cardNumber' field in the `qp_central.customers` table. This can be reconfigured in the *System Settings -> Online Booking Settings* by selecting a different Unique customer identifier field: `[publicId, email, phone, identificationNumber, externalId]`. When booking an Appointment through the public API, the calendar will try to identify the customer by this field by searching with that value on the `qp_central.customers.cardNumber` field. The 'cardNumber' can also be changed to one of the following under *System Settings -> Orchestra Synchronization Settings*: `[cardNumber, customField1, customField2, customField3, customField4, customField5]`. Please note that the calendar always writes the customer's generated publicId value into customField5 and the email address into customField4.

Q: What's the format of longitude and latitude on the Branch object, and what are they used for?

A:

Values are typically imported from Qmatic Orchestra when the "Fetch" button is used. If entered manually, a double-precision decimal value is used such as 57.636902, 12.017655. They currently only serve an informational purpose in the Qmatic Orchestra Calendar, but they could for example be used by an external system showing Branch locations on a map based on Branch data fetched from the Calendar Public API.

Q: What's the purpose of the Branch 'Custom Settings'?

A:

By default, the custom settings for a Branch isn't used by the Calendar, but an external system may use the Custom Settings to store some arbitrary data that doesn't fit any of the standard fields on the Branch object.

Q: Can I change the name of a Branch or Service after fetching it from Qmatic Orchestra?

A:

Yes, as long as you keep the Orchestra ID the Service/Branch names can be changed.

Q: I have created an Appointment Profile according to all instructions, but no Services are selectable in the Calendar View or in Public API responses?

A:

Please make sure you actually mark the Services you want to serve on your Branch in the Appointment Profile by Ctrl+clicking on them in the multi-choice selection dialog.

Q: How do I select multiple Services in an Appointment Profile or multiple Resources for a Resource Group?

A:

Ctrl+click on each item or Shift-click to select a range of items in the multi-choice lists.

8. Notifications

Topics in this chapter

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Introduction

The Notification Admin application is used to configure how and when SMS messages and/or emails should be sent to customers and staff members. Changes in the Notification Admin application take effect immediately.

Appointments

For appointments, you can send emails or SMS messages to customers

- when the appointment is booked
- to send an appointment reminder
- when appointments are cancelled

 **Important:** Sometimes the customer or staff member can select a preferred notification method ("notification type"), at the time of creating a booking. Any such setting will override the default settings in the Notification Admin application.

This can be done from Qmatic Web Booking, Appointment Booking and Concierge. So for example, if a staff member using Concierge chooses to send an appointment confirmation via SMS, but email is set in Notification Admin, the system will send an SMS.

Therefore, you should always configure both SMS message, Email subject and Email message for all active appointment messages.

Visits

For visits, you can send emails or SMS messages to customers

- when a visit is called
- when a visit is created
- when a visit is ended. This can be used, for example, for sending out Customer Feedback surveys.
- when a visit reaches certain positions in the queue.
- A staff member can also trigger a notification manually from Counter or Concierge application (see Visit update).

Staff Alerts

For staff, the following notifications can be sent:

- When the defined service level agreement (SLA) has been reached. The alerts are sent to users with a specific role.
- When a customer arrives to a specified queue or service. The alerts can be sent to users with a specific role.

Setup to get started

ⓘ This section is only for system administrators. If you only want to change the messages, see sections “Configure visit messages” on page 178, “Configure staff alerts” on page 182 and “Configure appointment messages” on page 188.

ⓘ Make sure that all Queue Agents (that you want to set up) are up and running when using Notification Admin. Otherwise, it will not be possible to read/write branch variables or even request the queues for a branch on a Queue Agent that is not running.

Setup overview

To get started, you need to:

1. Read through the section “Before you start” below.
2. Configure settings for SMS and email.
3. If needed, change date and time format and user credentials.

Before you start

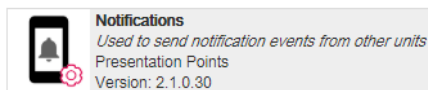
Before you start using Notification Admin, make sure you have completed the following steps:

1. To use Notifications, you need an email/sms provider. Make sure to use an email/sms provider that can handle a heavy load, where the system frequently checks for newly registered appointments.

For example (depending on the configuration), the system will check for new appointments every 5 minutes and then send out sms messages for all of the appointments that were booked during those 5 minutes, in a rapid succession.

As message provider, we recommend Messaging Services.

2. Add the **Notification unit type** to the wanted equipment profiles.



Make sure to configure the unit type correctly. Most settings are done in branch level. For example, Visit call and Visit positions are not enabled by default.

For more information about the unit type, see the Standard Unit Type's Guide, found on Qmatic World.

Configure time and date format

- To configure time and date format, go to General > Date Time format and enter the wanted formats. Then click **Save**.

Configure user credentials

To configure user credentials, go to General > User Credentials.

You need to provide the user credentials for a user that can be used to get data to the Notification module via REST calls. The user should have access to the following access modules:

- Appointment
- EntryPoint connector
- ManagementInformation connector
- ServicePoint connector
- Notification connector.

The default notification user with the NotificationRestClient role is preconfigured with the correct access modules.

When done, click **Save**.

Configure SMS Settings

To configure SMS settings

1. Select type of SMS Gateway.
2. Enter the required settings for that SMS Gateway.
3. Test the SMS configuration by clicking the *Test SMS Configuration* button and then entering a test phone number. The format of the phone number should be *<country code><phone number>*, for example *46123456789*. If you receive a test SMS, you know that you have configured the system correctly.

The settings for the different SMS Gateways are described below.

❗ There are also *Custom* choices. They are however not described below.

SMTP

General Settings

Sender Email address

Receiver Email address

Subject

Phone number

Insert

Email Body

Phone number

Insert

Character Set

Enter Host.

Enter Port.

User

Password

Start TTLS

Yes

Authenticate

Yes

Save

Cancel

Test SMS Configuration

Enter the following settings:

- Sender Email Address
- Receiver Email Address
- Subject - here it is also possible to insert fields, such as Phone Number. Select the wanted value from the drop-down list, then click *Insert*.
- Email Body - here it is also possible to insert fields, such as Phone Number. Select the wanted value from the drop-down list, then click *Insert*.
- Character Set - enter the wanted character set here, for example *UTF-8*.
- Enter Host - enter SMTP host.
- Enter Port - enter SMTP port.
- User - enter SMTP User name here. This is only needed if you select *Yes* in the *Authenticate* drop-down list, below.
- Password - enter SMTP Password here. This is only needed if you select *Yes* in the *Authenticate* drop-down list, below.
- Start TTLS - select *Yes* or *No*.
- Authenticate - select *Yes* or *No*.

HTTP

HTTP Settings

Enter Host.

Enter Port.

Path

Authenticate None ▼

User

Password

Method GET ▼

HTTP Body

Content Type JSON ▼

HTTP Headers Add

Save Cancel Test SMS Configuration

Phone number ▼

Insert

The following *HTTP Settings* are available:

- *Enter Host* - enter HTTP host.
- *Enter Port* - enter HTTP port.
- *Path* - enter HTTP path.
- *Authenticate* - select either *None* or *Basic*. If *None* is selected, it is not possible to enter anything in the *User* and *Password* fields below.
- *User* - enter HTTP User name here. This is only needed if you select *Basic* in the *Authenticate* drop-down list, below.
- *Password* - enter HTTP Password here. This is only needed if you select *Basic* in the *Authenticate* drop-down list, below.
- *Method* - select between *GET* and *POST*. If you select *GET*, the *HTTP Body* field below will be disabled.
- *HTTP Body* - enter the HTTP body of the REST request here - only applicable if you selected *POST* above. You can select parameters, such as *Phone number*, *Branch Name*, and *Service Name* from the drop-down list, then click *Insert* to insert them into the body.
- *Content Type* - select between *JSON*, *HTML*, *TEXT*, and *ENCODED*.

- **HTTP Headers** - to add HTTP headers to the REST request, click *Add* and enter a *Name* and *Value* for each Header. It is also possible to *Delete* headers here.

Do not forget to click *Save* when done.

Beepsend

Prerequisites

To use Beepsend as an SMS Gateway, you:

- need a Beepsend account. For a process on how to set up your Beepsend account, see Qmatic World\Subscriptions.
- need to open up outgoing traffic to Host *api.beepsend.com* and Port *80* or *443*.

! Both HTTP and HTTPS can be used.

! The Beepsend Administrator Page can be found at <https://connect.beepsend.com>.

SMS Gateway

Enter the following information:

- **API-token** - this is a long string of characters (can be both numbers and letters), which you receive from Beepsend when signing up for an account with them.
- **From** - this is the default person/organization that will be used as sender for the SMS messages, for example Support.

! The *From* field is limited to a maximum of 11 characters.

- **HTTPS** - if this check box is checked (default), HTTPS will be used.

Make sure that you *Save* your settings.

Qmatic SMS

Qmatic SMS Settings

API-Key

From:

URL Shortener

☐

Save

Cancel

Test SMS Configuration

The following *Qmatic SMS* settings are available:

- *API-Key* - enter the API key for Qmatic SMS here.
- *From* - this is the default person/organization that will be used as sender for the SMS messages, for example Support
- *URL Shortener* - if this check box is checked, URL shortening will be enabled.

Max SMS length

In the *SMS Settings* area, enter a value for *Max SMS Length*. Then, click *Save*. The default length is 320 characters, the minimum is 120 and the maximum 1000. Please consider that your SMS messages may be split into several messages, if a large number of characters is allowed.

SMS Settings

Max SMS Length

320

Save

Configure email settings

Email

Email Settings

Enter Host.

Enter Port.

User

Password

Enter Email sender.

Start TTLS

No

Authenticate

No

Enter Email character set.

UTF-8

Save

Cancel

Test Email Configuration

This is the SMTP server information for sending “normal” emails to customers (Appointment Confirmation and Appointment Reminder), or staff members (alerts).

The following *Email Settings* are available:

- *Enter Host*
- *Enter Port*
- *User*
- *Password*
- *Enter Email sender*
- *Start TTLS* - select *Yes* or *No*.
- *Authenticate* - select *Yes* or *No*.
- *Enter Email character set* - enter the wanted character set here, for example *UTF-8*.

When done, click *Save*.

Test email configuration

You can test your configuration, by clicking the *Test Email Configuration* button and then entering a test email address.

If you receive a test email, you know that you have configured the system correctly.

Set Event Listener Hosts

ⓘ This setting is **not** needed for Queue Agents newer than 6.2.0.361, and a utt with version 2.1.0.18, or higher.

1. Go go General > Event Listener Host
2. Add all Queue Agents (including the Central Queue Agent), by entering their IP address, or host name, in the *Name* field and the web port (*8080* for Central and *18080* for Distributed) in the *Port* field. Also, make sure that you check the *HTTPS* check box, if you want to run the Queue Agent in HTTPS mode.
3. Also, enter the corresponding *Branch Prefixes* (comma separated) that the SMS service should listen to for ticket events (sent from the *Notifications* unit type). When done, click *Save*.

Configure visit messages

For visits, you can configure the following Notification types: *Visit Call*, *Visit Create*, *Visit End*, *Visit Update* and *Visit Positions*. These are described below.

Configure Visit Call messages

If a phone number is added to the visit, or a customer with a phone number is related to the visit, you can configure the system so that the customer gets an SMS when he/she is called.

You can only configure SMS messages (not email) for visit call notifications.

! Note that you need to have enabled the Visit Call parameter on branch level in the Notifications unit type for this to work.

Visit Call

To configure visit call messages

1. Go to Visits > Visit Call.
2. Select the branches and queues for which the Visit Call message should be sent.
3. Click Save.
4. Select *All* or a single service from the drop-down list, depending on if you want to configure the same message for all services or not.
5. Enter the message. You can fill in information in the message, by inserting parameters.
6. When you are done, click Save.

Configure Visit Create messages

If a phone number or email address is added to the visit, or a customer contact information is related to the visit, a message can be sent out to the customer when a visit is created.

Visit Create

The screenshot displays the 'Visit Create' configuration interface. It is divided into three main sections:

- Settings:** Contains a 'Type' dropdown set to 'Email then SMS', a 'Branches' list with 'Branch 1', and a 'Queues' list with 'All'. There are 'Save' and 'Cancel' buttons at the bottom.
- SMS Message:** Features a 'Services' dropdown set to 'All', a 'Messages' text area containing the template 'Visit {{ticket}} has been created at {{branchname}} for service {{serviceExtName}}.', a 'Parameter' dropdown set to 'Visit Id' with an 'Insert' button, and 'Save' and 'Cancel' buttons at the bottom. A status indicator shows '189 of 320 remaining'.
- Email Message:** Features a 'Content Type' dropdown set to 'TEXT', a 'Subject' text area with the template '{{visitId}} created.', a 'Parameter' dropdown set to 'Visit Id' with an 'Insert' button, a 'Services' dropdown set to 'All', a 'Messages' text area with the template 'Visit {{visitId}} has been created for {{serviceExtName}} at {{branchname}}.', a 'Parameter' dropdown set to 'Branch Name' with an 'Insert' button, and 'Save' and 'Cancel' buttons at the bottom.

To configure visit create messages

1. Go to Visits > Visit Create.
2. Select message type. There are four types to choose from:
 - Email then SMS
 - Email
 - SMS
 - Both Email and SMS
3. Select the branches and queues for which the visit create message should be sent.
4. Click Save.
5. For **SMS**, select for which services the SMS should be sent.
6. Enter the SMS message. You can fill in information in the message, by inserting parameters.
7. For **email**, select either TEXT or HTML as content type, enter a subject and then select for which services the email should be sent.
8. Enter the email message. You can fill in information in the message, by inserting parameters.
9. Click Save.

Configure Visit End messages

If a phone number or email address is added to the visit, or a customer with a phone number and/or email address is related to the visit, an SMS/email is sent to the customer, just after the visit is ended. This could be useful, for example, if you want to send out a customer feedback survey to the customer.

Visit End

Settings

Branches: Type: Branch 1

Queues: Both Email and SMS

Messages

Services: All

Message: Visit ended, please take our survey at www.buyone.com!

Parameter: Visit Id

266 of 320 remaining

Email Message

Content Type: HTML

Subject: Please take our survey!

Parameter: Visit Id

Services: All

Message: Thanks for visiting us, please take our survey at www.buyone.com and improve our customer service!

Parameter: Visit Id

To configure Visit end messages, follow the steps in “Configure Visit Create messages” on page 178.

Configure Visit Update messages

For a staff member using Counter or Concierge, it is possible to find a visit in the queue, add a phone number to the visit and trigger a notification manually. This can be used to send a link to the mobile ticket for that visit. For example is a customer has taken a paper ticket but wants a mobile ticket instead.

Visit Update

Settings

Branches: Landvetter, Partille - Allum

Queues: All

SMS Message

Services: All

Message: Here is a link to your Mobile ticket: {{mobileFullURL}}

Parameter: Visit Id

252 of 320 remaining

To configure visit update messages

1. Go to Visits > Visit Update.
2. Select the branches and queues for which the Visit Update message should be sent.
3. Click Save.
4. Select All or a single service from the drop-down list.

5. Enter the message. You can fill in information in the message, by inserting parameters.
6. When you are done, click Save.

Configure Visit Positions messages

When the visit reaches certain positions in the queue, the customer will get an SMS, if a phone number has been registered for that customer. The positions in the queue are defined in the Notifications unit type.

You can only configure SMS messages for visit positions (and not email).

Visit Positions

To configure visit positions messages

1. Go to Visits > Visit Positions.
2. Select the branches and queues for which the Visit Positions message should be sent.
3. Click Save.
4. For Position A and Position B (optional), select All or a single service from the drop-down list, depending on if you want to configure the same message for all services or not.
5. Enter the message. You can fill in information in the message, by inserting parameters.
6. When you are done with the message(s), click Save.

Configure staff alerts

The Staff Alerts tab has three sub tabs: SLA Alerts, Arrival Alerts and Custom Alerts. These are described below.

! The parameters Enable SLA Alerts and Enable Arrival Events and has to be checked in the Notifications unit type, in order for those alerts to be sent.

Configure SLA Alerts

SLA Alerts can be used to send alerts to staff members when the number of waiting customers or the waiting time have exceeded specific levels. You can configure SLA alerts for a certain queue or service point.

When you open the tab, use the drop-down list to select a branch to see all configured SLA alerts for a branch.

SLA Alerts

SLA Alerts for Branch Branch 1 ▾									
Queue	Type	Status	Alert Level	Reset Level	Role	Notification	Message	Subject	
2 - Queue 2	Waiting Customers	Enabled	5	3	SystemAdministrator	Email	SLA reached {{branchName}}	SLA	Edit Delete
Add									

To add an alert, follow these steps

1. Click Add.
2. Select if you want the alert to be based on **queue** or **service point**. This will determine the rest of the settings you need to configure.

Configure SLA Alerts based on queue

If you select based on **queue**, you need to configure the following:

- a) Select queue, type (waiting customers / waiting time), and status (enabled / disabled), from the drop-down lists.
- b) Enter alert level, and reset level.
 - For waiting customers: Enter number of customers
 - For waiting time: Enter waiting time in minutes

For example: If you have selected waiting customers as type, let's say you set the alert level to 10 and reset level to 5. This means an alert will be sent when there are 10 customers waiting. The alert will not be sent again until the number has decreased to 5 (reset level) and then increased to 10 again.
- c) Select the role that should receive these alerts. Note that users need to be assigned this role *and* have contact details configured in order to receive alerts.
- d) Decide whether or not an alert should *only* be sent to a staff member that has the selected role and is logged in at the workstation, *and* is serving the selected queue, according to his/her work profile.

If you want the users belonging to this role to receive alerts no matter if they are logged in or not, leave the box unchecked.
- e) Select notification type (Email / SMS).
- f) Enter a message and a subject (only required for email). You can fill in information by inserting parameters.
- g) Click Save.

Configure SLA alerts based on service point

If you select based on **service point**, you need to configure the following:

The screenshot shows the 'Edit Alert Setting' dialog box. The 'Based On' dropdown is set to 'Servicepoint'. The 'Type' dropdown is set to 'Max Serving Time'. The 'Status' dropdown is set to 'Enabled'. The 'Alert Level' is set to '80 %'. The 'Role' dropdown is set to 'Appointment Booking'. The 'Notification' dropdown is set to 'SMS'. The 'Message' field is empty, with a '320 of 320 remaining' indicator. The 'Subject' field is empty. There are two 'Branch Name' dropdowns with 'Insert' buttons, one for the message and one for the subject. At the bottom right are 'Save' and 'Cancel' buttons.

- Select type (Max Serving Time) and status (Enabled / Disabled).
- Enter the max serving time in minutes as alert level. If you set for example 15, an alert will be sent out when a transaction has been going on for 15 minutes.
- Select the role that should receive these alerts. Note that users need to be assigned this role *and* have contact details configured in order to receive alerts.
- Select notification type (Email / SMS).
- Enter a message and a subject (only required for emails). Fill in information by inserting parameters.
- Click Save.

Configure arrival alerts

Arrival alerts can for example be used to send notifications when an appointment customer has arrived.

When you open the tab, use the drop-down list to select a branch to see all configured arrival alerts for that branch.

Arrival Alerts

Arrival Alerts for Branch **Branch 1**

Based on	Service/Queue	Transfer/Create	App/Ticket	Receiver	Receiver Value	Notification	Message	Subject
Queue	All	Create	Any	Role	SystemAdministrator	SMS	Arrival Alert {{ticket}}	Edit Delete

[Add](#)

To add an alert, follow these steps

1. Click Add.
2. Select if you want the alert to be based on **queue** or **service point**. This will determine the rest of the settings you need to configure.

Edit Arrival Alert

Type:

Queue:

On:

App/Ticket:

Receiver Type:

Field Name:

Notification:

Message:

[Insert](#)

Subject:

[Insert](#)

[Save](#) [Cancel](#)

3. Select Type, (Queue / Service), and then which for queue or service the alert should be sent.
4. Select if the alert should be sent only when the visit is created, only when it is transferred, or both when it is created and transferred. Not that this option only is available if you selected Queue above
5. Select if the alert should be for appointments or visits, or both (any).
6. Next, select the type of receiver: Staff (Field on Appointment), Staff (Field on Ticket), role, or email.

! Note that Staff (Field on Appointment), and Staff (Field on Ticket) require that you have a customised version of Qmatic Orchestra. For more information, please contact Professional Services.

7. If you selected Staff (Field on Ticket) or Staff (Field on Appointment) above, enter the Field Name. If you selected role, select the wanted role from the drop-down list. If you selected Email, enter the email address.
8. Next, select if you want the alert to be sent as SMS or email and enter the Message and Subject (only required for an email). You can fill in information by inserting parameters.
9. Click Save.

Configure custom alerts

Custom alerts can be used to for example configure alerts to be triggered every time you have received bad marks from a feedback device.

To configure custom alerts, follow these steps

1. Go to Parameter and in Custom Alerts, click Add.
2. Enter the alert name (has to start with CUSTOM_)
3. Go to Staff Alerts > Custom Alerts.

Custom Alerts

Type	Receiver	Receiver Input Field	Notification	Message	Subject
CUSTOM_BAD_MARKS	Role	BranchManager	Email	You received the value {{expressiaMarkName}} for ...	Bad marks alert

Add

Edit Delete

4. Click Add. The following window is opened:

Edit Alert setting

Alert Type:

Receiver Type:

Role:

Notification:

Message:

Subject:

5. Select alert type. The available options are the custom alerts you have configured in the parameters tab.
6. Select receiver type, role or direct. Direct means that you have the option to enter a phone number or email address in the field below.
7. Select if the alert should be sent as email or SMS.
8. Enter the message and a subject (only required for emails). You can fill in information by inserting parameters.

Configure appointment messages

! The *Appointment* functionality is only available if you have installed the *Calendar* application.

The *Appointments* tab has three sub tabs: *Confirmation*, *Reminder*, and *Cancellation*. These are described below.

Configure Appointment Confirmation

Appointment Confirmations are sent out to customers, as soon as their appointment has been booked.

Appointment Confirmation

To configure the settings for appointment confirmations, follow these steps:

1. Enable the confirmation notifications by checking the check box.
2. Enter the number of minutes for how often the system should check for new appointment bookings in the Check Interval field.
3. Select Type (*Email then SMS / Email / SMS / Both Email and SMS*).

! Note that *Email then SMS* can be used as a fall back method. If a valid email address is missing, an SMS will be sent.

4. For Phone Field, select Other Customer field (please specify) or Other Appointment field (please specify). In the field below, specify the name of the Customer/Appointment field.
5. Select the wanted branch(es) and service(s) that the confirmation message should be sent out for.
6. For emails, select if you want to use text or HTML as content type.

❗ If you want to include a QR Code, you need to select HTML as Content Type for the QR Code to be included in the email itself. If you select TEXT, it will be included in an attachment.

7. Also, select if you want to attach iCalendar.

To edit the message for SMS and email, follow these steps

1. Select for which service (if not all) the message should be sent.
2. In the section below, you see a list of all languages that have been added in the Parameter tab. Click the Edit button to edit the message(s) for that language.
3. Enter a message and a subject (only required for emails). Fill in information by inserting parameters.
4. Click Save.

Appointment Reminder

Appointment reminders are sent out to customers a defined time before their appointment start time.

Appointment Reminder

Settings

Enabled ☐

Check Interval Minutes

First Reminder Time Hours before appointment

Second Reminder Time Minutes before appointment

Type

Phone Field

Branches

Landvetter
Partille - Allum

Email settings

Content Type

Attach iCalendar ☐

SMS and Email messages

Language	SMS Message	Email subject	Email body
Default language	Reminder that you have an appointment at {{time}}		
Swedish	Påminnelse om att du har en bokad tid kl {{time}}		
Dutch	Herinnering dat u vandaag een afspraak heeft.		

To configure the settings for appointment reminders, follow these steps

1. Select the checkbox to enable appointment reminders.
2. Enter the number of minutes for how often the system should check for new appointment bookings.
3. Enter up to two reminder times for how long in advance reminders should be sent out. For the second reminder time, enter 0 if no reminder should be sent out.

ⓘ If the appointment is booked closer to the start time than the reminder time, then no reminder is sent out.

4. Select Type (Email then SMS / Email / SMS / Both Email and SMS).

ⓘ Email then SMS can be used as a fall back method. If a valid email address is missing, an SMS will be sent.

5. For Phone Field, select Other Customer field or Other Appointment field. In the field below, specify the name of the Customer/Appointment field.
6. Select the wanted branch(es) and service(s) that the confirmation message should be sent out for.
7. For emails, select if you want to use text or HTML as content type.

ⓘ If you want to include a QR Code, you need to select HTML as Content Type for the QR Code to be included in the email itself. If you select TEXT, it will be included in an attachment.

8. Select if you want to attach iCalendar.

To edit the message for SMS and email, follow these steps

1. Select for which service (or all) the message should be sent.
2. In the section below, you see a list of all languages that have been added in the Parameter tab. Click the Edit button to edit the message(s) for that language.
3. Enter a message and a subject (only required for emails). Fill in information by inserting parameters.
4. Click Save.

Appointment Cancellation

Appointment Cancellation can be a useful feature, for example if a staff member is ill, or if a whole branch is closed down due to unforeseen events.

Appointment Cancellation

Language	SMS Message	Email subject	Email body
Default language	{[peopleServices.translatedLabelForAdults.translatedLabelForChildrenOptional]}		{[qrCodeInternalId]}
Swedish			
Dutch			

To configure the settings for appointment reminders

1. Enable by checking the check box.
2. Enter the number of minutes for how often the system should check for cancellations in the Check Interval field.
3. Select Type (Email then SMS / Email / SMS / Both Email and SMS).



Email then SMS can be used as a fall back method. If a valid email address is missing, an SMS will be sent.

4. For Phone Field, select Other Customer field or Other Appointment field. In the field below, specify the name of the Customer/Appointment field.
5. Select the wanted branch(es) and service(s) that the confirmation message should be sent out for.
6. For emails, select if you want to use text or HTML as content type.
7. Also, select if you want to attach iCalendar.

To edit the message for SMS and email

1. Select for which service (or all) the message should be sent.
2. In the section below, you see a list of all languages that have been added in the Parameter tab. Click the Edit button to edit the message(s) for that language.
3. Enter a message and a subject (only required for emails). Fill in information by inserting parameters.
4. Click Save.

Parameters

Parameters are used to configure dynamic information in messages and subjects. To see all available parameters, go to the Parameter tab.

The parameters have one display name and one parameter name. The display name is what is displayed in the drop-down lists when editing a message. The parameter name is what is inserted into the message, for example `{{visitId}}`.

Visit parameters

Table 1: Visit parameters

Display name	Parameter name	Description
Visit Id	visitId	The unique ID for the visit
Branch Id	branchId	The unique ID for the branch
Branch Name	branchName	The branch name
Phone Number	phoneNumber	The phone number of customer or staff member, depending on notification type
Queue Name	queueName	The queue name
Reminder Time	returnTime	<i>Not used</i>
Service Name	serviceIntName	Internal service name
Service External Name	serviceExtName	External service name
Service Point	servicePointName	The service point that has called the visit
SLA	SLA	Service level agreement
Ticket Number	ticket	Ticket number, for example A001
Mobile ticket base URL	mobileBaseURL	Base URL for Mobile Ticket, set in system parameters.
Mobile ticket URL	mobileFullURL	Full URL for Mobile Ticket, includes the checksum for a specific visit.

Appointment parameters

⚠ There are several similar appointment Id parameters which can be used in messages: Appointment Id, External Id, QWeb Book Id and Appointment Public Id. Which one to use is highly dependant on how the system is set up and what you want the receiver to do with the Id.

Table 2: Appointment parameters

Display name	Parameter name	Description
Appointment Id	appointmentId	The internal appointment Id from the calendar database.
External Id	appointmentExtId	The external appointment Id from the qp_central.appointment table
Date	date	Appointment date
Time	time	Appointment time
Branch Id	branchId	Branch Id
Branch Name	branchName	Branch Name
Branch Postcode	branchPostcode	Branch Postcode
Branch City	branchCity	Branch City
Branch Address 1	branchAddress1	Branch Address 1
Branch Address 2	branchAddress2	Branch Address 2
Branch Country	branchCountry	Branch Country
Branch Latitude	branchLatitude	Branch Latitude
Branch Longitude	branchLongitude	Branch Longitude
Service Name	serviceName	Service
First Name	customerFirstName	Customer first name
Last Name	customerLastName	Customer last name
Phone Number	phoneNumber	Customer phone number

Table 2: Appointment parameters

Display name	Parameter name	Description
QWeb Book Id	qWebBookId	A booking reference generated from the appointment Id and the appointment time. Qmatic Web Booking assigns this unique Id to every appointments and it can be put in confirmation messages and used for arriving appointments.
QR Code (calculated)	qrCodeCalculated	A QR code which is generated from a combination of the appointment Id and the appointment time.
QR Code (externalId)	qrCodeExternalId	A QR code which uses the external Id of the appointment.
QR Code (InternalId)	qrCodeInternalId	A QR code which is generated from the appointment Id (internal Id), appointment time, branch and branch Id. This QR code can for example be used with Concierge to easily find an appointment without entering any search criteria manually.
QR Code (qwebbookId),	qrCodeQWebBookId	A QR code which uses the QWeb Book Id of the appointment.
Appointment Public Id	appointmentPublicId	The 64 character long public appointment Id from the calendar database.
Customer Public Id	customerPublicId	Public Id of the customer.

Table 2: Appointment parameters

Display name	Parameter name	Description
Services and People	peopleServices	Used to add information about all booked services and number of people (adults and children) on an appointment per booked services. App ID: 1177 Branch name: Helsingborg Service name: Service 1 Date: 03/06/2020 Service 2 (1 Adult) Service 3 (1 Adult) Service 4 (1 Adult) Service 5 (1 Adult) Service 6 (1 Adult) Service 7 (1 Adult) Service 1 (1 Adult) Time: 11:00 Price: The division between adults and children is only shown if that is configured, for example for Qmatic Web Booking. If you need "adult" and "children" to have translated labels, you replace that part in the string (e.g. translatedLabelForAdults) when you insert the parameter into the message.)

Add custom parameter

To add a Parameter, click *Add*:

Add Message Parameter

Parameter Display Name

Parameter Name on ticket

Enter the wanted *Parameter Display Name* and *Parameter Name on ticket*, then click *Ok*. Do not forget to click *Save* in this tab, when done.

ⓘ The Parameters that you add here will be available in all *Parameter* drop-down lists in all tabs.

Once all configuration is done, restart Qmatic Orchestra, before starting to enter appointments, etc.

Add languages

Appointment messages can be sent in different languages to support localization. To create messages in other than default language, follow these steps:

1. In Parameters tab > Additional Languages, click Add.
2. Add a Language Name and Language Code (example: nl).
3. In Appointments tab > Appointment Confirmation/Reminder/Cancellation > SMS and Email messages, you will find a list of Notification Email and SMS templates per Language. There you can create a messages for each language.

9. Concierge

For instructions on how to set up Concierge, please see the separate Concierge manual, found in Xtend.

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