

# QMATIC

**MANUAL**

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## **BACKOFFICE TERMINAL**

**267.01B**

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# 1. What's new

| Version | Chapter                                                   | Change                                                                                   |
|---------|-----------------------------------------------------------|------------------------------------------------------------------------------------------|
| 01.A    | <ul style="list-style-type: none"><li>• General</li></ul> | <ul style="list-style-type: none"><li>• Manual for Backoffice Terminal created</li></ul> |
| 01.B    | <ul style="list-style-type: none"><li>• General</li></ul> | <ul style="list-style-type: none"><li>• Updated manual according to new design</li></ul> |



# 2. Installation

## Topics

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## 2.1 General information

Backoffice Terminal lets a staff member who works in back office monitor the waiting time and number of waiting customers for the different queues of a work profile in a branch.

The screenshot displays the Backoffice Terminal interface. On the left is a 'Settings' sidebar, and on the right is the main 'User Pool' view.

**Settings Sidebar:**

- Branch:** Avenyn (dropdown menu)
- Work Profile:** Call from all queues (dropdown menu)
- Notifications:**
  - Notify on App. waiting time: ☒
  - Waiting time: 15 min (input), Actual: 177 min (text)
  - Waiting customers: 7 (input), Actual (incl. pool): 7 (text)
  - Notification sound volume:

**User Pool View:**

Search bar at the top right.

| Visit number | Service   | Waiting time | App. Waiting time | Customer | Appointment time |
|--------------|-----------|--------------|-------------------|----------|------------------|
| A0501        | Insurance | ▲ 177 min    |                   |          |                  |

Items per page: 10 | 1-1 of 1 | Navigation icons

**Queue View:**

Queue selector: All queues (dropdown)

| Type                      | Queue name                | Waiting time | Waiting customers |
|---------------------------|---------------------------|--------------|-------------------|
| Insurance                 | Insurance                 | ▲ 176 min    | 2                 |
| Banking services          | Banking services          | ▲ 177 min    | 4                 |
| Appointment Queue Banking | Appointment Queue Banking | 0 min        | 0                 |

Items per page: 10 | 1-3 of 3 | Navigation icons

### 2.1.1 Use case examples

**Use case 1:** Let's say the acceptable waiting time is considered to be 30 minutes. A person in the back office, normally doing other tasks, can then set the waiting time threshold to 30 minutes. If the waiting time goes above 30 minutes, the staff member will be notified.

**Use case 2:** A work profile can be created to serve only one appointment queue. If the threshold level for the number of waiting customers is set to 0, and a customer is inserted into that appointment queue, the staff member will be notified that a customer has entered that appointment queue.

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## 2.2 Installation

This section describes how to manually install Backoffice Terminal. If you install from Xtend, go to step 6.

1. Copy backofficeterminal.war to <Orchestra\_install\_dir>\system\custdeploy.
2. Add the file backofficeterminalMessages.properties to <Orchestra\_install\_dir>\system\conf\lang.
3. Add the content from the file commonMessages.properties in the Department Reception package to the file applicationMessages.properties, located in <Orchestra\_install\_dir>\system\conf\lang.
4. To make the required changes to the qp\_central database, execute update\_central.sql from the sql folder.
5. Restart Orchestra Central.
6. Create users and roles with access rights for Backoffice Terminal, see access rights below.
7. This installs Backoffice Terminal on Orchestra Central. To install on distributed agents, you need to create an agent profile which contains Backoffice Terminal and then perform a remote upgrade. For more information about remote upgrade, see the Reference Manual

## 2.3 Access rights

Users of Backoffice Terminal need to be assigned to a role with the following access module:

- Service Point Connector

Users also need to be assigned to the branches that they will monitor.



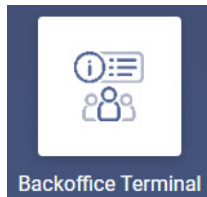
# 3. Using Backoffice Terminal

## Topics

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## 3.1 Backoffice Terminal overview

To open Backoffice Terminal, click on the icon in the Orchestra home page.



Use the drop-down field on the left to select the branch and work profile that you want to monitor. Only the queue connected to the selected work profile will be displayed in the queue overview.

### Branch

Select Branch

Select Workprofile

The selection you make will be saved for the next time you log in.

To close the Settings panel, click the Settings icon.

### 3.1.1 User pool

| User Pool                         |           |              |                   |          |                  |
|-----------------------------------|-----------|--------------|-------------------|----------|------------------|
| Search                            |           |              |                   |          |                  |
| Visit number                      | Service   | Waiting time | App. Waiting time | Customer | Appointment time |
| A0501                             | Insurance | 7 min        |                   |          |                  |
| Items per page: 10 1-1 of 1 < > > |           |              |                   |          |                  |

In the user pool overview, you see the visit number, service, waiting time, appointment waiting time, customer name and the appointment start time for the visits in your user pool.

To sort the list, click on any column header.

To search for a visit in the user pool, use the search field to search for either visit number, service name or customer name.

### 3.1.2 Queue overview

| Type | Queue name                | Waiting time | Waiting customers |
|------|---------------------------|--------------|-------------------|
|      | Insurance                 | 42 min       | 3                 |
|      | Banking services          | 42 min       | 14                |
|      | Appointment Queue Banking | 41 min       | 1                 |

Items per page: 10 1-3 of 3 |< < > >|

In the overview for all queues, you see the queue type (normal or appointment queue), queue name, waiting time and number of customers.

The red warning triangles are shown when the set threshold levels are breached.

To sort the list, click on any column header.

### 3.1.3 Detailed queue information

| Visit number | Service          | Waiting time | App. Waiting time | Customer      | Appointment time |
|--------------|------------------|--------------|-------------------|---------------|------------------|
| A1168        | Apply for a loan | 211 min      | 132 min           | Anna Anderson | 1:00 PM          |

Items per page: 10 1-1 of 1 |< < > >|

To view detailed information about a queue, select that queue from the drop-down list. Here you can see the service, waiting time, appointment waiting time, customer and appointment start time for all visits in the queue.

## 3.2 Waiting time definitions

In some tables, you can see both the waiting time and the appointment waiting time. These are calculated differently and there is an important difference in what they represent.

**Waiting time** - The time that the customer has waited without being called since they entered the queue, no matter if it is a drop-in visit or an appointment where there is an appointment start time.

**Appointment waiting time** - The waiting time is the time that has passed since the appointment start time. If the current time is before the appointment start time, this value is 0.

## 3.3 Notifications

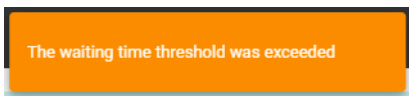
Notifications are triggered when the set thresholds for waiting time or number of waiting customers are exceeded. The waiting time threshold takes into account the longest waiting time in any of the queues or the user pool. The number of waiting customers threshold takes into account the total number of customers in all queues and the user pool.



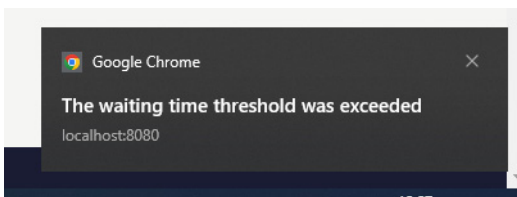
For desktop notifications to work, they must be allowed in the browser settings and in the operation system settings.

When a notification threshold is exceeded:

- an in-app notification is displayed



- a sound is played
- a desktop notification sent from the browser is displayed.



Notifications are triggered again if the value goes below the threshold and then above again. A check is done every 30 seconds.

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### 3.3.1 Set up notifications

1. If you want the waiting time threshold to use the appointment waiting time for appointments, turn on **Notify on App. waiting time**.
2. Set the threshold values for waiting time and number of waiting customers.
3. Set the volume for the notification sound. If you don't want any sound to be played, drag the slider to the far left and the sound will be turned off.

#### Notifications

Notify on App. waiting time ☒

|                                     |                                      |
|-------------------------------------|--------------------------------------|
| Waiting time                        | Actual                               |
| <input type="text" value="15"/> min | <input type="text" value="130"/> min |
| Waiting customers                   | Actual (incl. pool)                  |
| <input type="text" value="7"/>      | <input type="text" value="7"/>       |

Notification sound volume  



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