

QMATIC

MANUAL

OPERATIONS PANEL

269.01A

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1. What's new

Version	Chapter	Change
01.A	• General	• Manual for Operations Panel created
01.B	• Settings, Using Operations Panel	• Updated according to the consolidation of different Operation Panel

2. Deployment and configuration

Topics

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2.1 Installation

This section describes how to manually install Operations Panel. If you install from Xtend, go to step 4., then skip to step 7.

1. Copy **opspanelenterprise.war** to the custdeploy folder of Orchestra.
2. Add the file `opspanelEnterpriseMessages.properties` to `<Orchestra_install_dir>\system\conf\lang`. Also add additional properties files for your other languages to this folder
3. Add the following lines to the file `applicationMessages.properties`, located in `<Orchestra_install_dir>\system\conf\lang`.
`application.opspanelenterprise = Enterprise Operations Panel`
`application.opspanelenterprise.description = Branch detail overview`
`module.opspanelenterprise = Enterprise Operations Panel`

`application.opspanelenterprisecentral = Enterprise Operations Panel (Central)`
`application.opspanelenterprisecentral.description = Branch detail overview (Central)`
`module.opspanelenterprisecentral = Enterprise Operations Panel`
4. Change the following line in the file `conf/lang/businessConfigMessages.properties` accordingly:
`label.address3 = Web Cam Url`
5. To make the required changes to the `qp_central` database, execute `update_central.sql` from the `sql` folder.
6. Restart Orchestra central.
7. Create users and roles with access rights for Operations Panel. See “2.3 Access rights” on page 4.
8. Add and configure the unit type template for Operations Panel. See “2.3 Unit type template” on page 5.

This installs Operations Panel on Orchestra Central. To install Operations Panel on distributed agents, you need to create an agent profile which contains Operations Panel and then perform a remote upgrade. For more information about remote upgrade, see the Reference Manual.

To change the settings for Operations Panel, see “3.2 Graph settings” on page 8.

2.2 Access rights

Users of Operations Panel need to be assigned to a role with the following access modules:

- Enterprise Operations Panel
- Connector EntryPoint
- Connector ServicePoint
- Connector ManagementInformation

For admin rights, create a role named exactly “Enterprise Opspanel Admin” and assign it with the above access modules.

2.3 Unit type template

The data and status are generated by a unit type template. To add the unit type template:

1. Go to System Administration and upload and add **statToOpspanelInfo.utt**.
2. Save.
3. Go to Business Configuration > Equipment Profile and add the unit type to the wanted equipment profile.
4. On this level, you can change the settings for Expressia and debugging (only enable debugging when requested by support).
5. Save and publish each branch.

2.4 Settings in Business Configuration

The URL for the webcam is set in Business Configuration > Branches > Edit branch.

General Information

Enabled ☒

Name

Description

Runtime Setup

Queue Agent CONNECTED

Additional Information

Time zone

Mobile enabled ☒

Open Hours

Closing Hours

Address

Web Cam Url

Postcode

3. Settings

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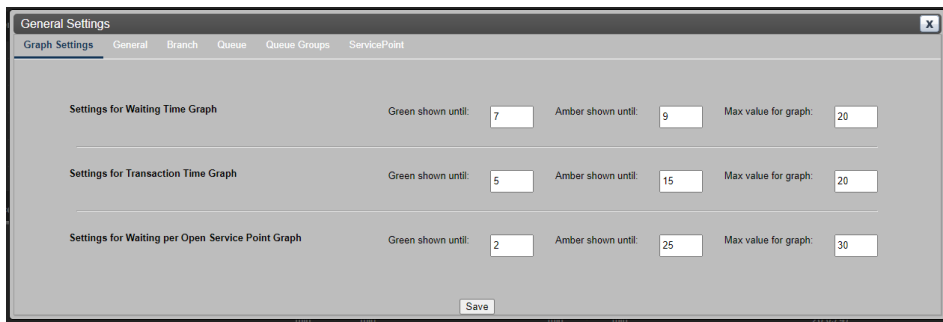
3.1 Introduction

❗ The settings in Operations Panel are global and applies for all users.

1. To change the settings for Operations Panel, log in with a user that has the role Enterprise Opspanel Admin assigned.
2. Click **General Settings** in the top right corner of the screen.

You can also go directly to the URL `http://<orchestra_host>:<port>/opspanelenterprise/?settingsadmin`

3.2 Graph settings



The screenshot shows a web application window titled "General Settings" with a close button (X) in the top right corner. Below the title bar is a navigation menu with tabs: "Graph Settings" (selected), "General", "Branch", "Queue", "Queue Groups", and "ServicePoint". The main content area is divided into three sections, each with a title and three input fields:

Settings for	Green shown until:	Amber shown until:	Max value for graph:
Waiting Time Graph	7	9	20
Transaction Time Graph	5	15	20
Waiting per Open Service Point Graph	2	25	30

At the bottom center of the window is a "Save" button.

In Graph settings you can edit the settings for:

- Waiting Time Graph
- Transaction Time Graph
- Open Service Point Graph

For each graph, you can make the following settings:

- **Green shown until:** Time limit for when the meter changes color from green to amber
- **Amber shown until:** Time limit for when the meter changes color from amber to red
- **Max value for graph:** Maximum value of the graph

When you are done, click **Save**.

3.3 General Settings

- **Color schema:** Color schema (black/white)
- **Value for Meter 3:** Information shown by the third meter on the start page.
 - Waiting per Open Service Point
 - Open Service Point
 - Average Open Service Point
- **Use Users SLA Settings:** Allows users to use their own SLA values (configured in Graph settings). If the box is not checked, the SLA settings will be applied globally.
- **Allow user to change SLA Settings:** Check this box if all users should be allowed to change the global SLA settings. Otherwise it's only admin users who can do it.
- **View shown if only one branch present:** View to show if only one branch is available.
 - Branch Summary
 - Queue Overview
 - Service Point Overview
- **Default sort order:** Default sorting order (ascending/descending)
- **Show Expressia Graph:** Check this box to show the graph for Expressia on the start page.
- **Show NPS tab:** Check this box to show the NPS tab
- **Show appointment summary:** Check this box to show Appointment Summary tab.
- **Show Webcam tab:** Check this box to show Webcam tab.
- **Width of the Web Cam frame:** Width of the webcam frame, in px or %.
- **Height of the Web Cam frame:** The height of the webcam frame, in px.
- **Show data if older than X min:** If this box is not checked, data older than the time set in the next setting will not be shown in Operations Panel
- **Time before data is invalid:** Time before data is considered old (the X in the settings above), in minutes.
- **Time before status led becomes red:** Limit for how much time (in minutes) must pass since the system was last updated before the light in the Status column in the Branch summary becomes red.
- **Show appointment waiting time:** Check this box to show appointment waiting time.
- **Show arrived early as negative time:** Check this box to show the waiting time for appointment customers who arrived early as negative.
- **Allow remove ticket:** Check this box to allow users to remove tickets.

- **Allow transfer for tickets to another queue:** Check this box to allow users to transfer tickets.
- **Allow transfer to first position in a queue:** Check this box to allow users to transfer tickets to first position.
- **Allow transfer to last position in a queue:** Check this box to allow users to transfer tickets to last position.
- **Allow transfer based on sorting:** Check this box to allow users to transfer tickets based on visit lifetime.

3.4 Branch settings

The branch settings are applied on the branch summary tab.

- **Region View:** Select how to show regions.
 - Not showing regions
 - Show regions in separate tab
 - Show regions in Branch Summary
 - Show regions in Branch Summary expanded
- **Default sorting for branches:** Set the default sorting column for the branch summary tab.
- **Hide Branches by Id (comma separated):** List the branches to not show in the branch summary.
- **Include pool waiting on branch overview:** Check this box to include the pool waiting time.
- **Show Branch Id Column:** Check this box to show the Branch Id column.
- **Show Served Above SL Column:** Check this box to show the Served Above SL column
- **Show No Show column:** Check this box to show the no-show column.
- **Show NPS on branch overview:** Check this box to show the NPS score column.
- **Show Waiting Above SL Now:** Check this box to show the number of customers waiting above SL now column.
- **Show avg waiting time:** Check this box to show the average waiting time column.
- **Show Max waiting time column:** Check this box to show the max waiting time column
- **Show Waited Above SL Column:** Check this box to show the waited above service level column.
- **Show AVG WT Today:** Check this box to show the average waiting time today column.

-
- **Show Max WT today Column:** Check this box to show the max waiting time today column.
 - **Show Max TRT Column:** Check this box to show the max transaction time column
 - **Show Below SL Column:** Check this box to show the column for the number of served customer below service level. It also shows the %.
 - **Show all tickets in a popup window:** Check this box to allow users to click the queue icon to see all visits in a branch.
 - **Show history for today:** Check this box to allow user to open the daily history graph.
 - **Length of the daily history graph:** Set the length of the daily history graph
 - **Start time for daily history graph:** Set the start time for the daily history graph
 - **Service level for daily history graph:** Set the service level for daily history graph
 - **Max value for daily history waiting time:** Set a max value for the daily history waiting time.
 - **Show totals:** Check this box to show the totals for all columns.

3.5 Queue settings

The queue settings are applied on the queue summary tab.

- **Default sorting for queues:** Set the default sorting column for the queue summary tab.
- **Default sort for tickets in queue:**
 - Unsorted
 - Ticket Number
 - Waiting Time
- **Group queues:** Check this box to make it possible to group queues. The queue groups are configured in the queue groups tab.
- **Expand groups:** Check this box to expand queue groups per default. If the box is not checked, you need to click on a group to expand it.
- **Show Served:** Check this box to show number of served customers.
- **Show Served Above SL Column:** Check this box to show served above service level column.
- **Show Recycled:** Check this box to show the number of recycled visits column.
- **Show Served Services:** Check this box to show the number of served services column.
- **Show Served Transactions:** Check this box to show the number of served transactions column.
- **Show No Show column:** Check this box to show the number of no-show customers column.
- **Show Waiting Above SL Now:** Check this box to show the current number of waiting customers above service level column.
- **Show Real waiting time:** Check this box to show the real waiting time column.
- **Show estimated waiting time:** Check this box to show the estimated waiting time column.
- **Show Max Waiting Time column:** Check this box to show the maximum waiting time column,
- **Show Waited Above SL Column:** Check this box to show waited above service level column.
- **Show AVG WT Today:** Check this box to show the average waiting time today column.
- **Show Max WT today Column:** Check this box to show the maximum waiting time today column.

- **Show Max TRT Column:** Check this box to show the maximum transaction time column.
- **Show Below SL Column:** Check this box to show the below service level column.
- **Show avg waiting time:** Check this box to show the average waiting time column.
- **Show Totals:** Check this box to show the totals for all columns.

3.6 Queue Groups

Queue groups are created in General settings > Queue Groups.

Group name	Selected Queues	Actions
Group 1	Appointment Queue 1, Appointment Queue 2, Default Queue 1, Default Queue 2, Default Queue 3, Default Queue 4	Edit Delete
Group 2	Default Queue 5, Holding Queue, Очередь по умолчанию 6, Очередь по умолчанию 7, 9, قائمة الانتظار الافتراضية 8, قائمة الانتظار الافتراضية 9	Edit Delete

1. To create a queue group, select a branch and click **Add**.
2. Enter a group name and select which queues to include.
3. Click **Save**.

You can also edit and delete the queue groups.

3.7 Service Point settings

The queue settings are applied on the service point summary tab.

- **Service Point Summary:** Select how to show the service point summary:
 - Show on separate view
 - Show on Queue Summary View
 - Do not show
- **Show Staff in Service Point Summary:** Check this box to show which staff member is logged in at a service point.
- **Show log on /log out:** Check this box to show last log on/log out times.
- **Show Queue name in Service Point Summary:** Check this box to show which queue a service point is serving.
- **Show waiting time:** Check this box to show the waiting time column.
- **Show average Transaction time for user:** Check this box to show the average transaction time column.
- **Show max Transaction time for user:** Check this box to show the maximum transaction time for the user.
- **Show Served on Service Point:** Check this box to show the number of served customers in the service point overview.
- **Show served above Service Level:** Check this box to show the number of served customers above service level.
- **Allow user to be logged out:** Check this box to enable the force logout functionality.
- **Show totals:** Check this box to show the totals for all columns.

4. Using Operations Panel

Topics

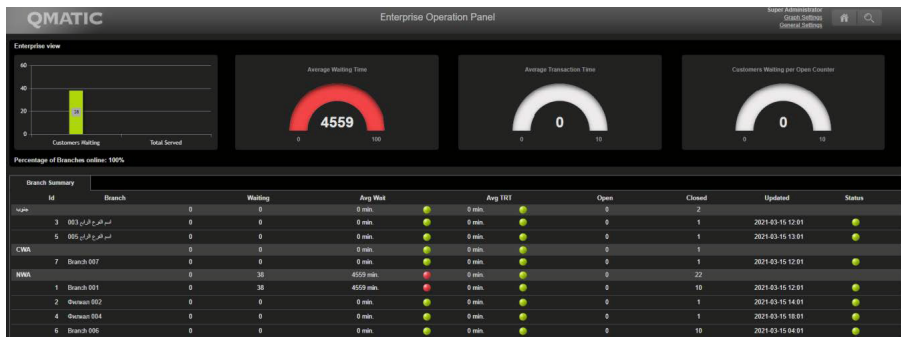
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4.1 Introduction

With Operations Panel, you can:

- see information about the number of waiting customers in a branch
- see detailed information about the different queues
- see the performance of service points
- find, transfer and remove visits
- change the work profile for a staff member remotely

When you open Operations Panel, you see data for the whole organization (enterprise view).



To see data for a specific branch, select that branch in the Branch Summary view. To return to the enterprise view, click the Branch Summary tab.

4.2 Data overview

At the top of the page you see the following graphs:

- Customers Waiting/Total Served
- Average Waiting Time
- Average Transaction Time
- Customers Waiting per Open Counter/Open Service Points/Average Open Service Points
- Satisfaction level (if enabled in General settings)

Until a branch has been selected, the graphs show data for the whole organization.

When a branch is selected, the graphs show data for that branch only.

The colors of the meters indicate how well your organization or branch is meeting the service level. You can change the maximum time shown in the meter and limits for when the graphs change colors in Graph settings.

4.3 Branch Summary tab

In the Branch Summary tab, you see a summary of all branches if your organization has more than one branch.

Branch Summary											
Region	Branch	Served	NPS	Waiting	Avg Wait	Avg TRT	Open	Closed	Updated	Status	
-		2		2	2237 min. 	1 min. 	1	9			
1	Central Station	2	0.0	1	227 min. 	1 min. 	1	4	2023-03-09 14:47		History
2	Avenyn	0	0.0	1	4248 min. 	0 min. 	0	5	2023-03-09 14:47		History

Select a column header to sort data by that parameter.

The branch summary shows information per branch about the number of customers waiting, the average and maximum waiting time, NPS score, the number of open and closed service points etc. An administrator can define which columns to show here in the settings.

4.3.1 Indicator lights

Average waiting time

The indicator light (green, amber or red) in the average waiting time column is the same as the color of the Average Waiting Time meter.

Average transaction time

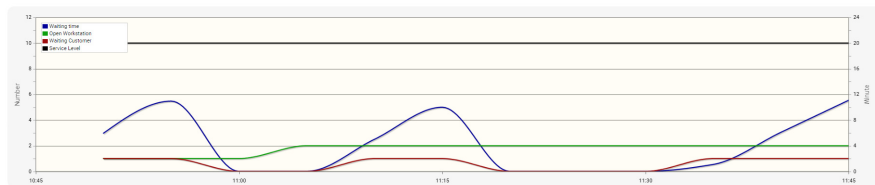
The indicator light (green, amber or red) in the average transaction time column is the same as the color of the Average Transaction Time meter.

Status

The indicator light (red or green) showing the system status is based on the minutes between the current time and the time the data was last updated. Administrators can set how long it takes for the status led to become red in the settings.

4.3.2 View history

If **Show history for today** is enabled in the settings, there is a History column furthest to the right in the branch summary. Click **History** to see the history graph for that branch.



The history graph shows how the waiting time, the number of open workstations and the number of waiting customers have changed over the day.

You can also see how well the branch meets the service level.

4.4 Region Summary tab

It possible for administrators to set information per region to be shown in a separate tab. The columns are the same as in the Branch Summary tab.

4.5 Queue Summary tab

To open the Queue Summary tab, select a branch in the branch summary.

In this tab you see data for each queue in the branch. If you have grouped queues, there is an additional row with combined data for all the queues in the group.

Id	Queue	Served	Waiting	Wait. Time	Avg Wait	Avg TRT	Open
1	Banking services	1	1	04:20:03	260 min.	1 min.	1
4	Insurance	1	0	00:00:00	0 min.	0 min.	1

The queue summary shows information per queue about the number of customers waiting, the average waiting time, the maximum waiting time, the average transaction time, the number of open service points etc. An administrator can define which columns to show here in the settings.

4.5.1 View visits in queue

Click on a queue to see information about each visit in that queue

Tickets						
Ticket	Actions	Notes	Service	Appointment Time	Wait. Time	Customer
A002			Apply for a loan		00:05:40	
A003			Apply for a loan		00:05:35	
A004			Open savings account		00:05:26	

From Actions, you can select to transfer  or remove  a visit. You can transfer a visit to another queue (first in line, last in line, or based on visit lifetime), to a staff member or to a service point.

4.6 Service Point Summary tab

To open the Service Point Summary, select a branch and go to the Service Point Summary tab.

In this tab you see data for each service point in the branch.

Branch Summary		Queue Summary		Service Point Summary		NPS		Web Cam				
Id	Service Point	Staff member	First login	Last logout	Service	Ticket No.	Customer	Satisfaction	Serving Time	Served	Profile	Force logout
1	WebServicePoint	Super Administrator	08:53		Insurance	A0503		—	0 min.	6	Call from all queues	Logout
2	Concierge	Closed	08:50	08:53					0			

The queue summary shows information per service point about which service and ticket number that is currently served, the average waiting and transaction time, the number of served customers etc. An administrator can define which columns to show here in the settings.

4.6.1 Log out user

- To log out a user, click **Logout** in the column Force logout.

4.6.2 Transfer and remove visits

To view all visits in their pool, click on a service point or a staff member. From

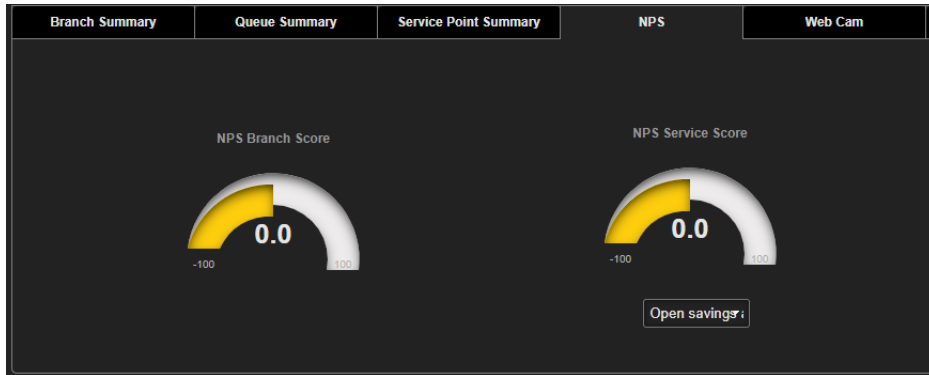
Actions, you can select to transfer  or remove  a visit. You can transfer a visit to another queue (first in line, last in line, or based on visit lifetime), to a staff member, or to a service point.

4.6.3 Change work profile

- To change the work profile for a service point, click on the work profile, select a work profile from the list and click **OK**.

4.7 NPS tab

The Net Promoter Score (NPS) tab is visible if **Show NPS tab** is enabled in General Settings.



The left meter shows the NPS score for the branch.

The right meter shows the NPS score for a selected service. Select a service in the list.

4.8 Web Cam tab

In the Webcam tab you can see a real-time view of your waiting area if you have set up a webcam for streaming.

It's enabled and configured in General Settings.

4.9 Appointment Summary tab

The Appointment Summary tab is visible if **Show appointment summary** is enabled in General Settings.

In this tab you can see data for appointments:

- Branch
- Booked
- Arrived
- Pending

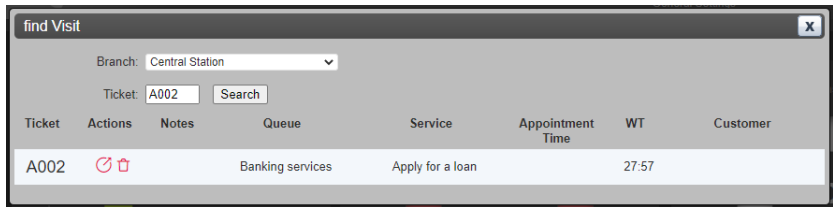
4.10 Find visit

If you know the ticket number for a visit, you can search for a visit within a branch to perform one of the following actions:

- Remove visit
- Transfer visit to another queue
- Transfer to first position in a queue
- Transfer to last position in a queue
- Transfer based on sorting

To find the visit:

1. Click Find visit  in the top menu.



Ticket	Actions	Notes	Queue	Service	Appointment Time	WT	Customer
A002	 		Banking services	Apply for a loan		27:57	

2. Select a branch
3. Enter the ticket number
4. Click **Search**.

Once you have found the visit, you can transfer  or delete  it.

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