EZQUEUE · MAIN APP

Office Admin Manual

For office heads who manage their office, staff and reports.

Contents

1. Sign in
2. Read the office overview
3. Add or change a service
4. Add or change a staff account
5. Add or change a station
6. Look up past tickets
7. Make a report
8. Read the analytics
9. Check the activity logs
10. Read notifications
11. Change office settings

1 Sign in

Sign in with your username and password to manage your office.

What this is for

You need to sign in before you can manage your office.

Before you start

- Your username and password.
- Access to your email, if this is a new computer.

Steps

1. Type your username in **Username** and your password in **Password**.
2. Tap **Sign In**.
3. If you see **Two-Factor Authentication**, type the 6-digit code from your email. On your own work computer, tick **Remember this device for 30 days**.
4. Tap **Verify & Sign In**. **Office Overview** opens.

If something goes wrong

- **No code in your email**: wait a minute, then tap **Resend verification code**.
- **You forgot your password**: the sign-in page says to contact the system administrator for a reset.

2 Read the office overview

See your office's line, your stations and what needs attention.

What this is for

Office Overview is the first page after you sign in. It shows the line, the stations and the day's work for your office.

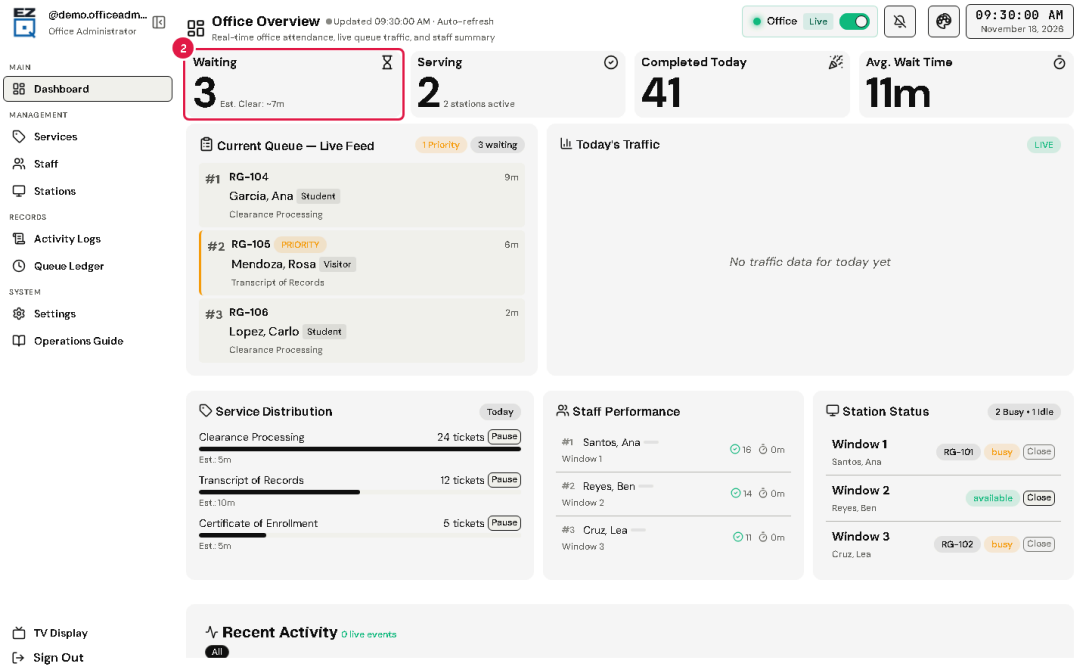
Before you start

- You are signed in.

Steps

1 Tap **Dashboard** in the left menu.

2 Read the boxes at the top: **Waiting**, **Serving**, **Completed Today** and **Avg. Wait Time**. Point at a box, or tap it, to see more.



3 Read **Needs Attention**. It appears only when something needs you, for example tickets waiting over 30 minutes or an open station without staff. Its button takes you to the page that fixes it.

4 **Current Queue — Live Feed** lists waiting tickets. Tap a ticket to see its details.

> **Tip** The **Office** chip at the top says **Live** (shown on kiosks) or **Hidden** (hidden from kiosks). Use its switch to change it. Only the office admin can change this.

If something goes wrong

- **The numbers look old**: the page updates by itself. Check the update time next to the page title, and your internet connection.

3 Add or change a service

Set up the services your office offers on the kiosk and remote portal.

What this is for

A service is something your office does, like a transcript request. Clients choose a service when they get a ticket.

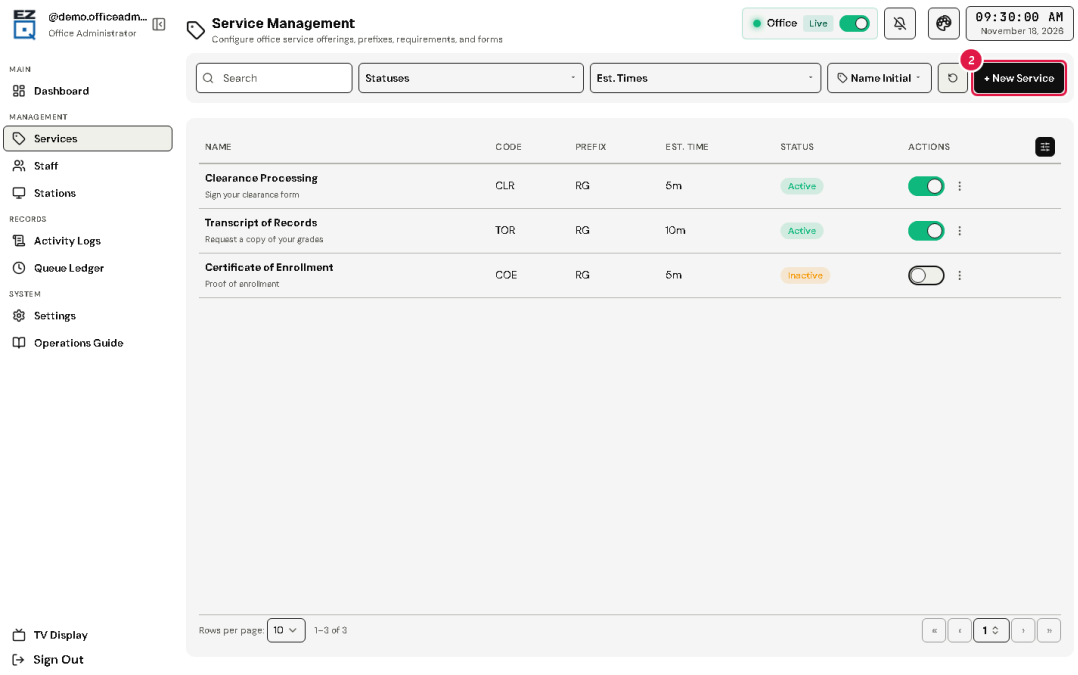
Before you start

- You are signed in as office admin.

Steps

1 Tap **Services** in the left menu.

2 Tap **New Service**.



3 Fill in **Service Name**, **Service Code**, **Prefix** and **Est. Minutes**. These four are required (*).

4. Add a **Description** and the **Service Reminders, Requirements & FAQs** clients will see.

5. Tap **Add**.

6. To change a service later, open its actions menu (⋮), choose **Edit**, change the details, and tap **Save**.

7. To stop a service for now, turn off its status switch.

> ⚠ **Warning** Delete asks you to type the service name. The service is removed for good, but its old tickets are kept. If it has ticket history, it is turned off instead of deleted. The page suggests turning a service off instead of deleting it.

If something goes wrong

- **An error shows when you tap Add**: read the message and check the required boxes (*).

4 Add or change a staff account

Create accounts for your tellers and give them a station.

What this is for

Each teller needs an account to sign in, and a station to call clients.

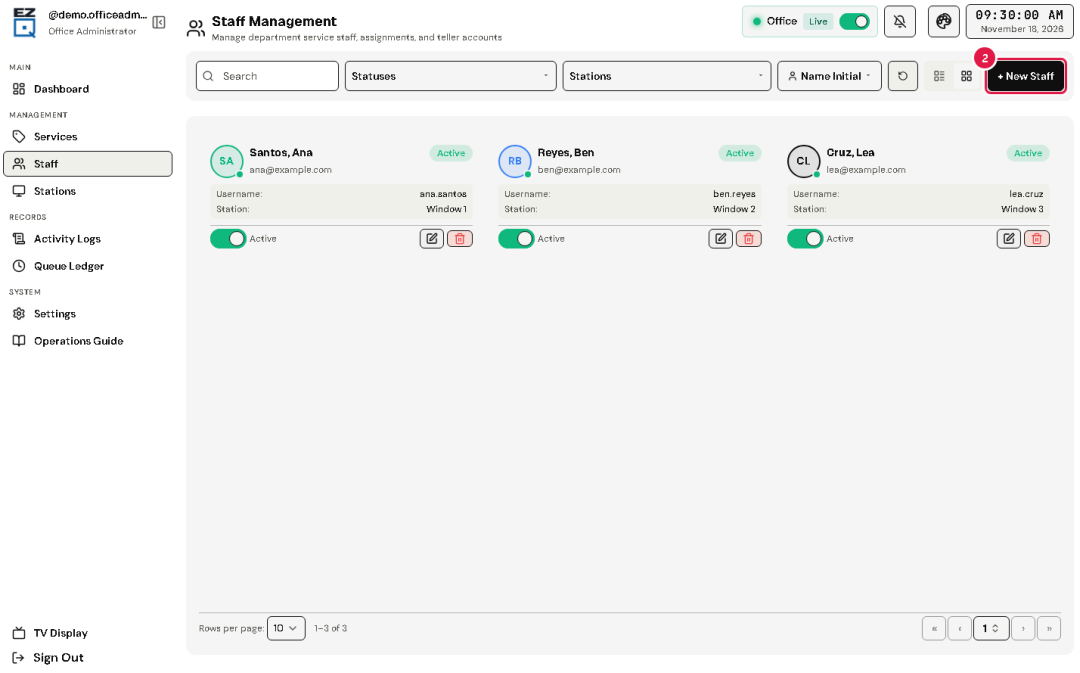
Before you start

- You are signed in as office admin.
- The station exists (see **Add or change a station**).

Steps

1 Tap **Staff** in the left menu.

2 Tap **New Staff**.



3 Fill in **Full Name**, **Username**, **Email**, **Password** and **Confirm Password**.

4. Choose the teller's **Station**, or leave **— Not Assigned —**.

5. Tap **Add**. The teller signs in with this username and password.

6. To change an account, open its actions menu (⋮) and choose **Edit**. Leave **Password** empty to keep the old one. Tap **Save**.

7. To stop an account for now, turn off its status switch.

> ⚠ **Warning** **Delete** asks you to type the name. The account is removed for good; its tickets and sessions are kept.

If something goes wrong

- **A teller sees "No active station assigned"**: edit their account and choose a **Station**.

5 Add or change a station

Set up counters, and choose who works there and what they serve.

What this is for

A station is a counter or window, like "Window 3". The TV screen tells clients which station to go to.

Before you start

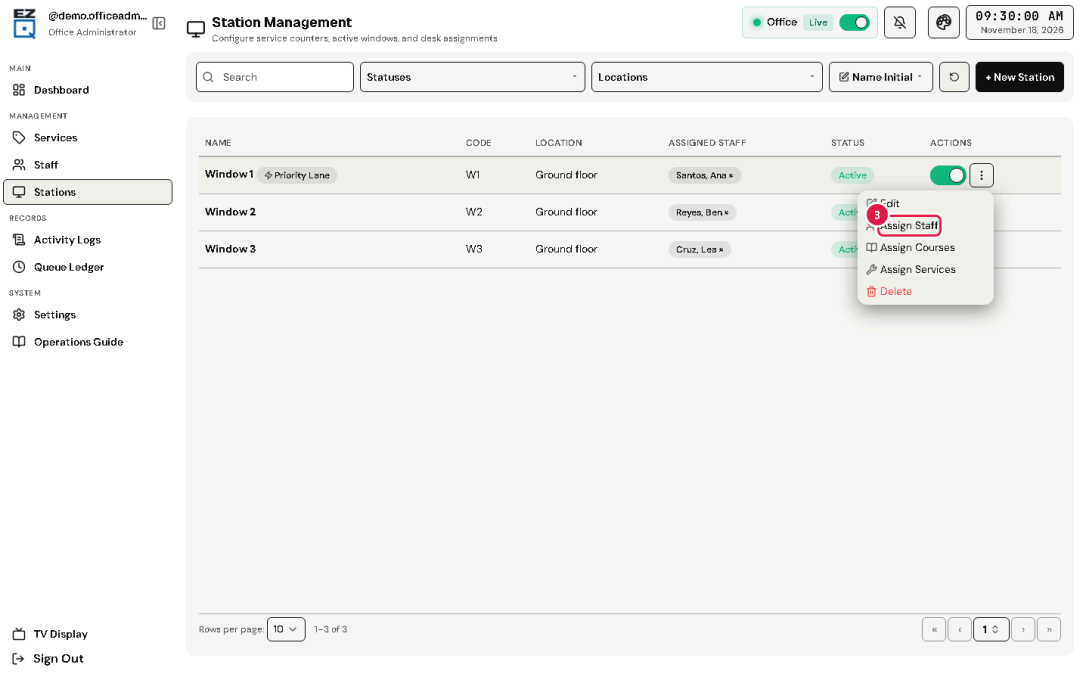
- You are signed in as office admin.

Steps

1. Tap **Stations** in the left menu.

2. Tap **New Station**. Fill in **Station Name** and **Station Code**, then tap **Add**.

3. To set up a station, open its actions menu (the ⋮ button, or right-click the row).



4. Choose **Assign Staff** and pick the teller in **Select Staff**.

5. Choose **Assign Services** to pick the services the station serves, then tap **Save Services**. Choose **Assign Courses** to pick its courses, then tap **Save Assignments**.

6. To stop a station for now, turn off its status switch.

> **Tip** Turn on **Priority Lane** in a station's details to let its teller register priority clients at the counter. This also needs **Enable priority queue** on in **Settings**.

If something goes wrong

- **A teller is at the wrong station**: in **Assigned Staff**, tap their name to unassign them, then assign them again.

6 Look up past tickets

Search your office's ticket history and export it.

What this is for

The **Queue Ledger** is your office's ticket history: served records you can filter, search and export.

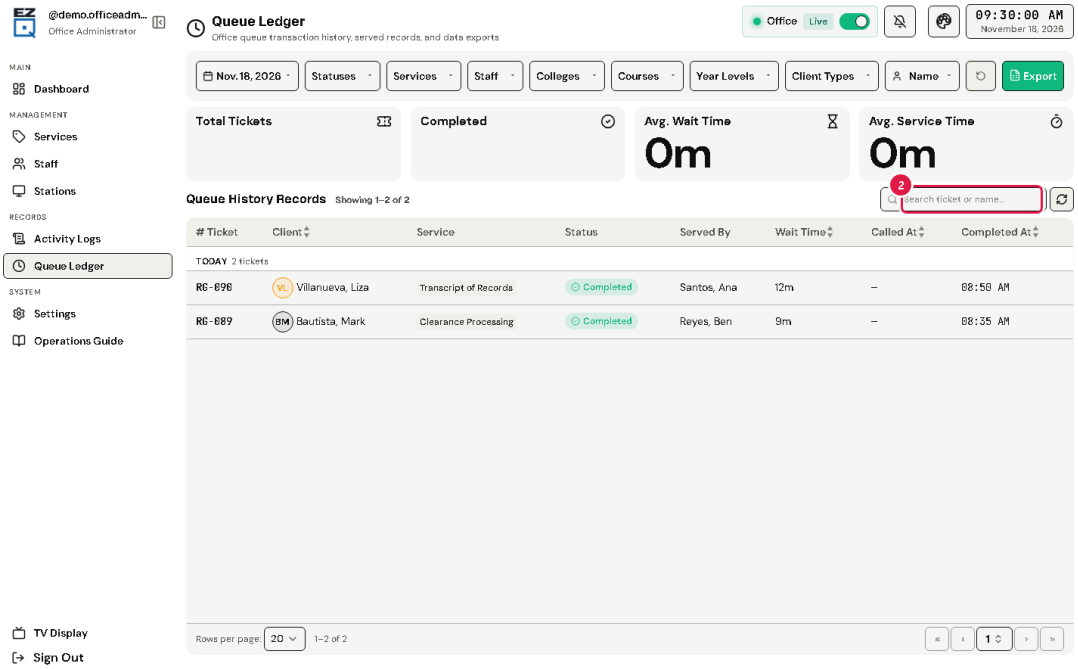
Before you start

- You are signed in as office admin.

Steps

1 Tap **Queue Ledger** in the left menu.

2 Type a ticket number or name in **Search ticket or name…**.



3 To narrow the list, use the filters, for example **Status**, **Service** or **Staff**, and choose the dates.

4 Tap a ticket to see its details.

5 Tap **Export**. A preview opens, where you can download it as a PDF or print it.

If something goes wrong

- **The list is empty**: tap **Reset Filters** and check the dates.

7 Make a report

Create a traffic, service or staff report for your office.

What this is for

Department Reports sums up your office's work: traffic, wait times and performance.

Before you start

- **Reports** is in your left menu. It shows only when a system admin turns on **Enable System Reports View**.

Steps

1. Tap **Reports** in the left menu.
2. Choose a **Report Type**: **Queue Traffic Report**, **Service Report** or **Staff Performance**.
3. Choose the dates. The report shows on the page.
4. Tap **Export**. The Document Builder opens, where you set up and save the report.

If something goes wrong

- **No Reports in the menu**: ask a system admin to turn on **Enable System Reports View** in System Settings.

8 Read the analytics

See charts of your office's queue, staff and peak hours.

What this is for

Real-time Analytics shows charts of your office's live numbers and trends.

Before you start

- **Analytics** is in your left menu. It shows only when a system admin turns on **Enable Analytics Dashboard**.

Steps

1. Tap **Analytics** in the left menu.
2. Scroll through the charts, for example **Staff Utilization**, **Peak Hour Heatmap** and **SLA Compliance**.
3. To change how often the page updates, choose a **Refresh Interval**.
4. To save staff numbers, use **Export Staff Performance**.

If something goes wrong

- **No Analytics in the menu**: ask a system admin to turn on **Enable Analytics Dashboard** in System Settings.

9 Check the activity logs

See who did what in your office, and when.

What this is for

Activity Logs is your office's record of actions and system events.

Before you start

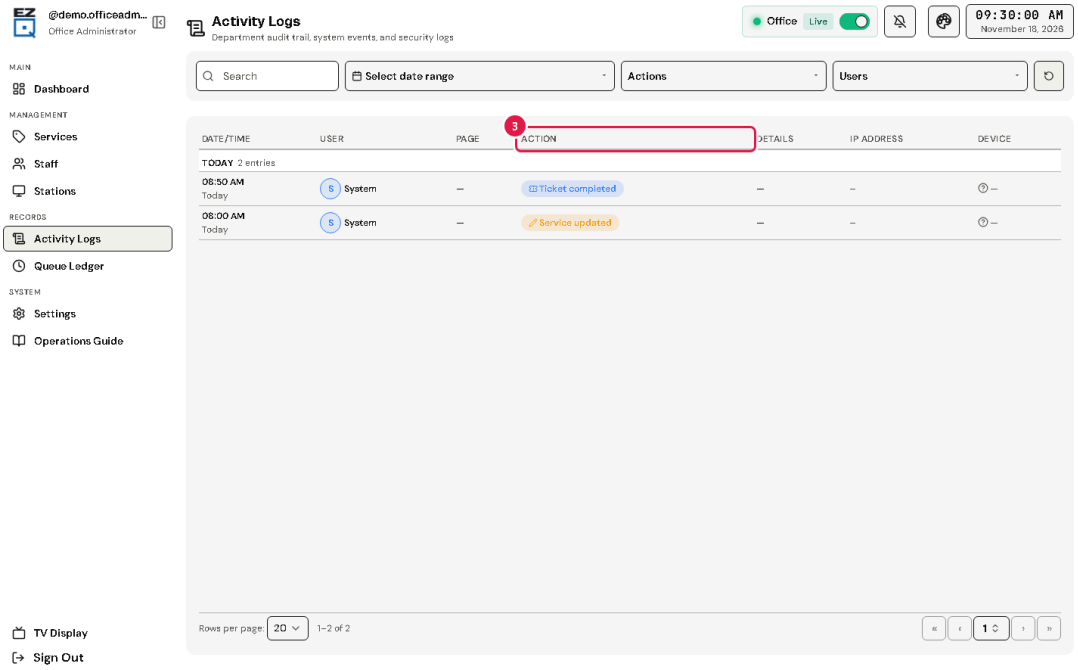
- You are signed in as office admin.

Steps

1. Tap **Activity Logs** in the left menu.

2. Type in **Search** to find an action.

3. To narrow the list, choose an **Action** or a **User**.



If something goes wrong

- **The list is empty**: tap **Reset Filters**.

10 Read notifications

See system alerts and announcements for your office.

What this is for

Notifications collects system alerts, operational broadcasts and queue announcements.

Before you start

- You are signed in as office admin.

Steps

1. Tap **Notifications** in the left menu.
2. Read the list. Use the filters to narrow it, and **Reset Filters** to clear them.
3. To remove a notification from the list, tap **Dismiss**.

11 Change office settings

Set ticket limits, timers, priority rules and the TV display for your office.

What this is for

Office Settings controls how your office's line works.

Before you start

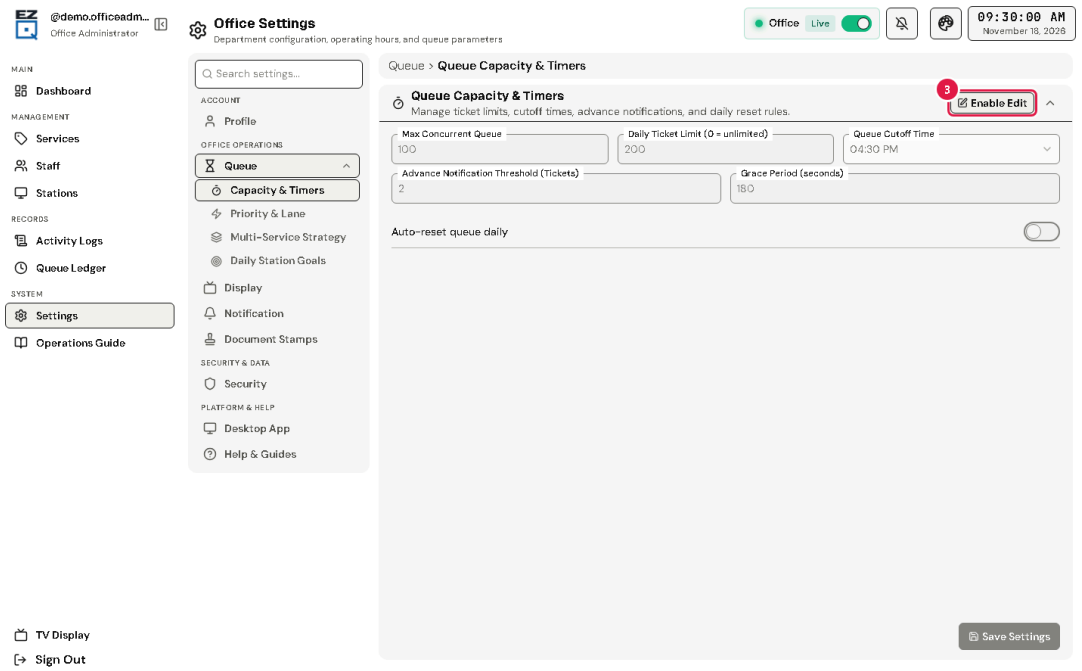
- You are signed in as office admin.

Steps

1. Tap **Settings** in the left menu.

2. In the list on the left, tap a section. For example, under **Queue**, tap **Capacity & Timers**.

3. Tap **Enable Edit**.



4 Change the values you need. For example:

- **Daily Ticket Limit (0 = unlimited)** and **Queue Cutoff Time**.
- **Grace Period (seconds)**: how long a called client has to come. Then EZQueue moves the ticket to the end of the line.
- **Advance Notification Threshold (Tickets)**: clients this close to the front of a station's line get the "Your Turn is Approaching!" alert.

5 Tap **Save Settings**.

> **Tip** Other sections include **Priority & Priority Lane Rules**, **Display Configuration** (TV and voice) and **Security Settings**, where you change your password.

If something goes wrong

- **Save Settings is grey**: tap **Enable Edit** first.
- **You cannot change your office**: the page says the office cannot be changed; contact the system administrator.