su•••re
from data to action

Onboarding Process

for tenant admins

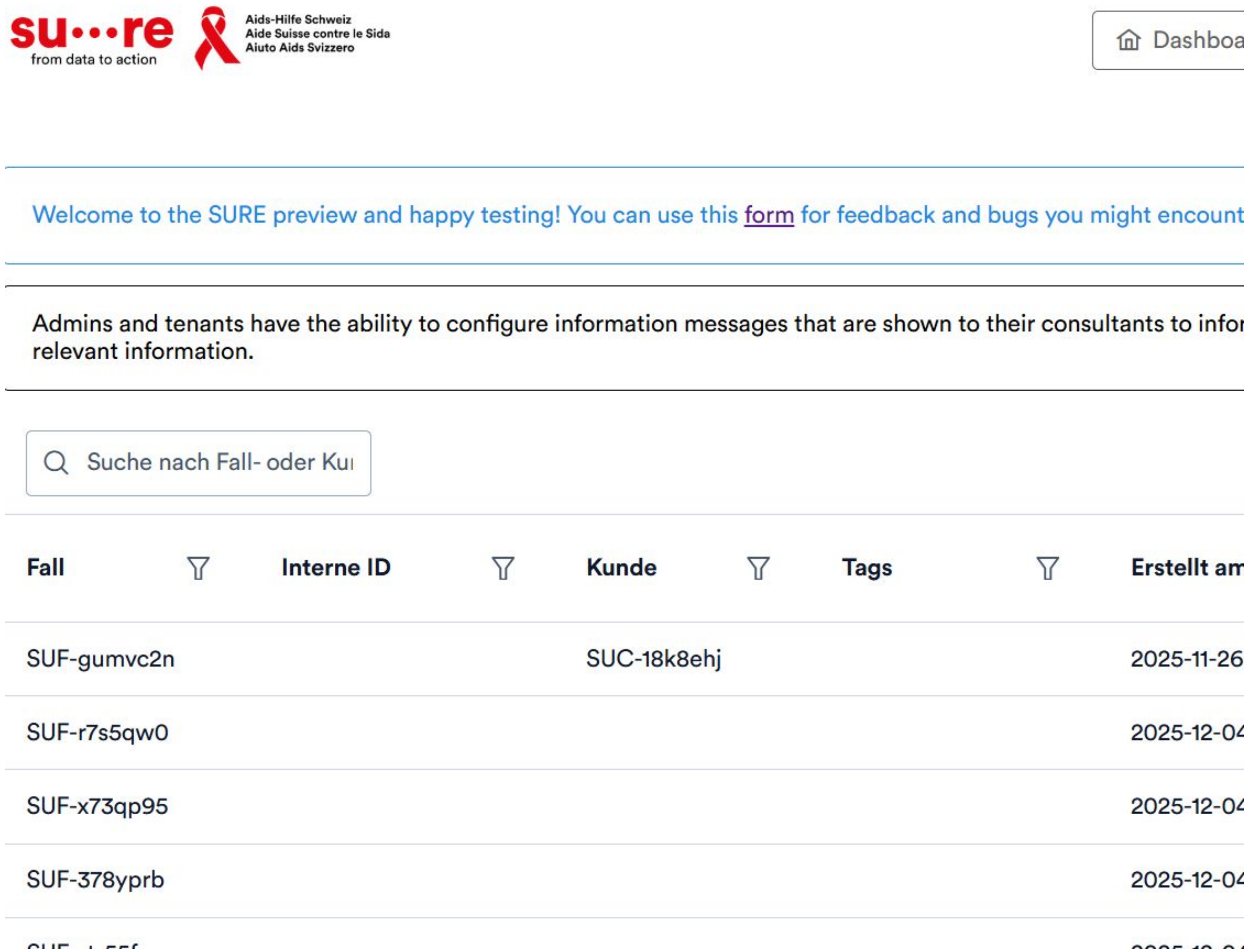
November 2024

Welcome

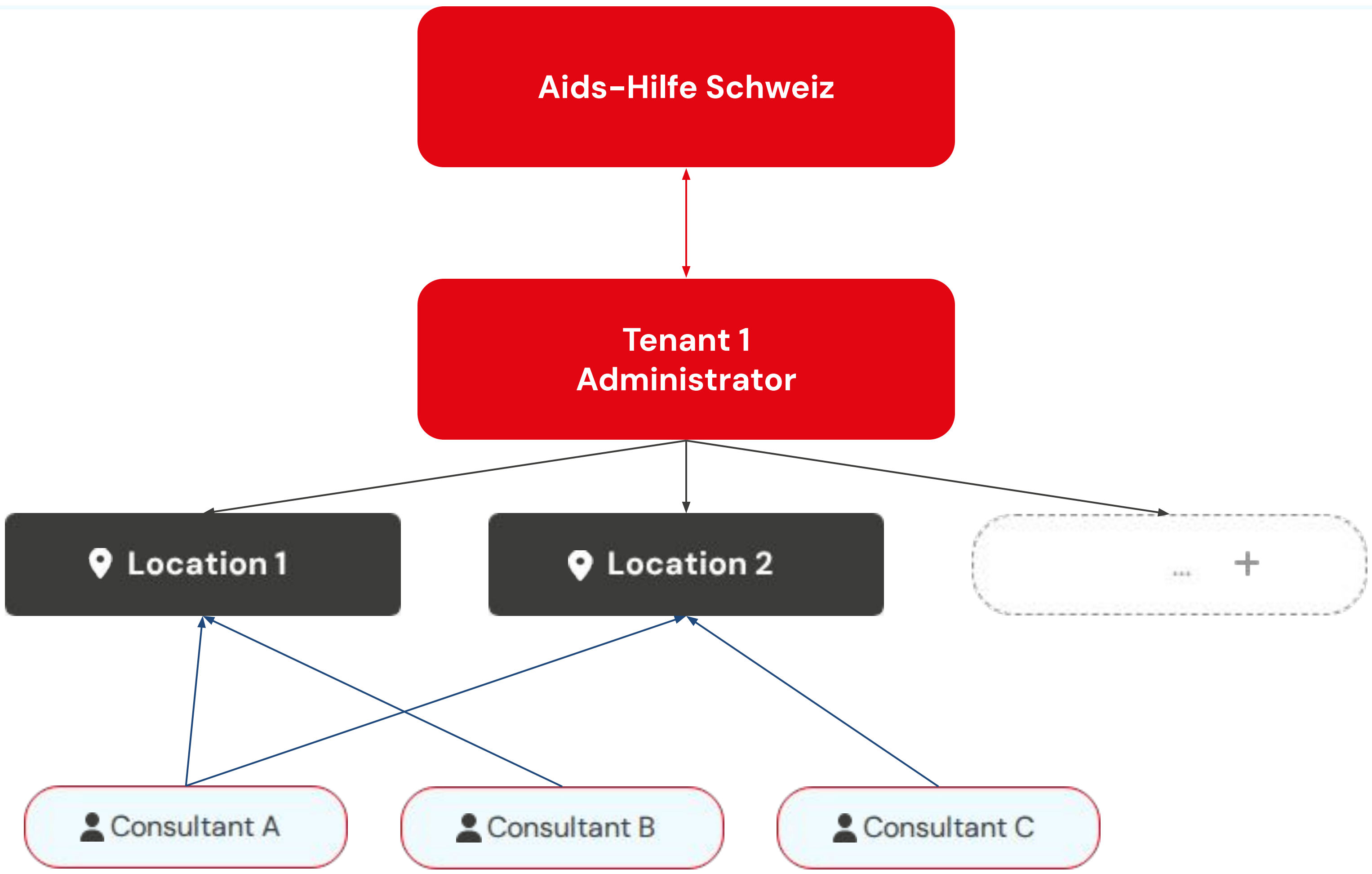
Overview

This deck outlines the onboarding process for the tenant admin role.

Focus: Core administrative duties (locations and consultants) and system access.



Organizational Structure of SURE



System Concepts & Access

What is your responsibility?

Tenant (organization)

Administrator to the organization
Action: You EDIT existing settings (logo, opening hours) about your organization. You have access to data and log files.

Consultant (staff)

Manager of the employees
Action: You ADD new users and link them with your locations. You manage all access to your data.

Step 1: Sure Login

Your access credentials will be delivered via email.

You must complete the initial sign-in process.

no-reply@staysure.ch 13:57 (vor 2 Stunden)
an mich

Hello Christian,

A new account has been created for you for on SURE by Christian Trunz.

To set your password and activate your account, please click the following link:
http://staging.staysure.ch/setup?sesame=AAAACwsTLy9TkfnJw9jfcXy8&email=christian.trunz%40gmail.com

...

Step 2: CRM Access

After login, you access the administration interface.

You can now manage all settings, your locations and consultants.

SURE Admin

MENU

Locations
Consultants

Admin Interface

Configuration Interfaces

Interface 1: Tenant

Purpose

Manage the high-level identity of the Organization.

Action: Edit Identity

You can edit the Name and upload the **Logo**.

Tenant Name:

Fachstelle Zurich

[Upload]

Interface 2: Locations

Purpose

Manage physical sites. This is where operational data lives.

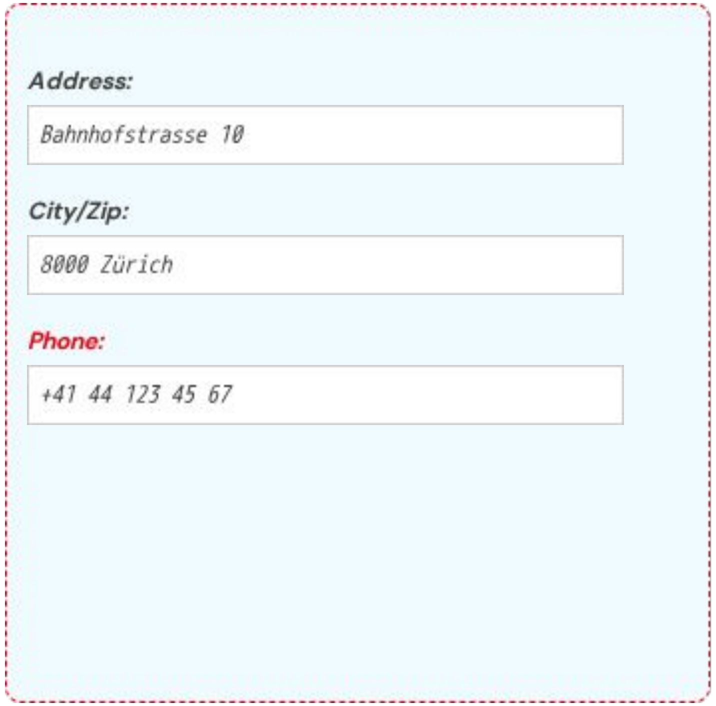
Action: Create & Configure

Create new locations here. Configure **Address**, **Phone**, **Opening Hours**, and **Questions**.

Location Configuration (Detailed)

1. Core Data (Address/Phone)

Define the physical coordinates for this specific Location.



Location Configuration (Detailed)

2. Opening Hours

Set operating times for your location. Critical for automated client communication (SMS).

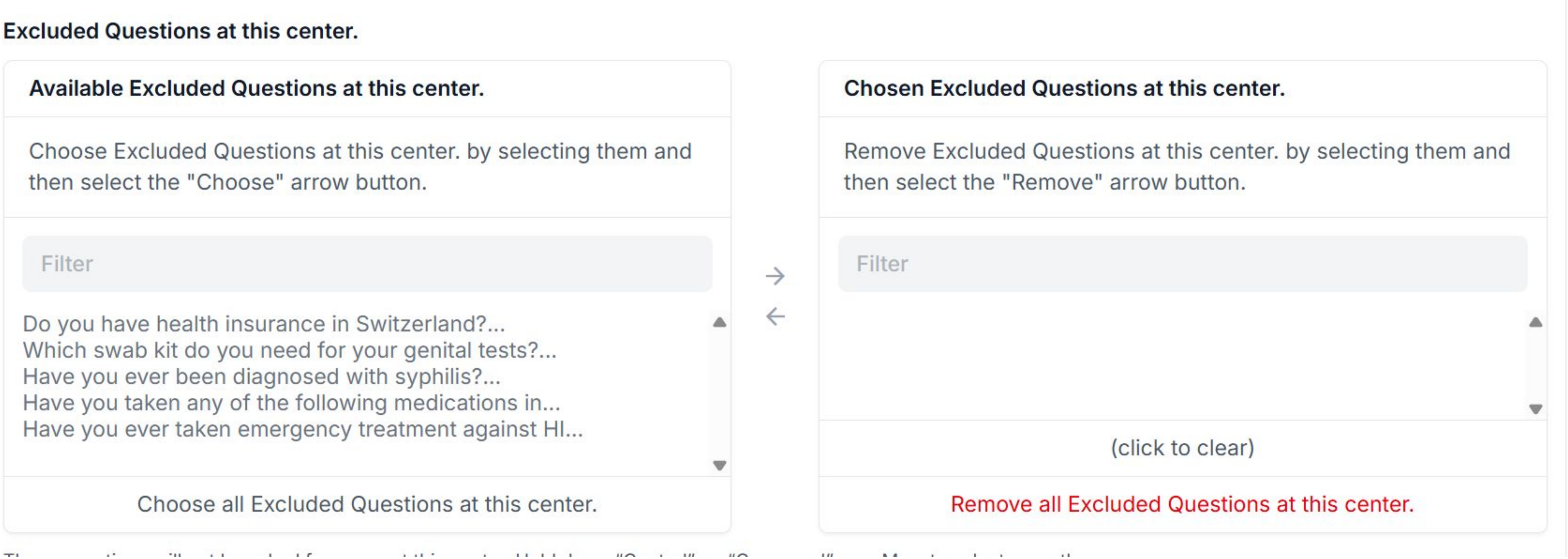
Opening hours

{"friday": [["09:00", "12:00"], ["13:00", "17:00"]], "monday": [["09:00", "12:00"], ["13:00", "17:00"]], "sunday": [], "tuesday": [["09:00", "12:00"], ["13:00", "17:00"]], "saturday": [], "thursday": [["09:00", "12:00"], ["13:00", "17:00"]], "wednesday": [["09:00", "12:00"], ["13:00", "17:00"]]}

Location Configuration (Detailed)

3. Excluded Questions

Customize the intake process by removing irrelevant questions.



Link the Consultant to the specific 'Tenant' (Location) you configured in the previous slide.

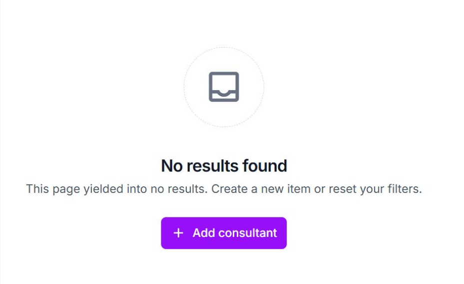
Consultant Onboarding (Personnel)

Step 1: Access Consultants

Click on **Consultants** to view personnel. **Prerequisite:** Location Setup (Slide 6) complete.

Step 2: Add New Consultant

Click **'Add Consultant'**. Consultants are added individually.



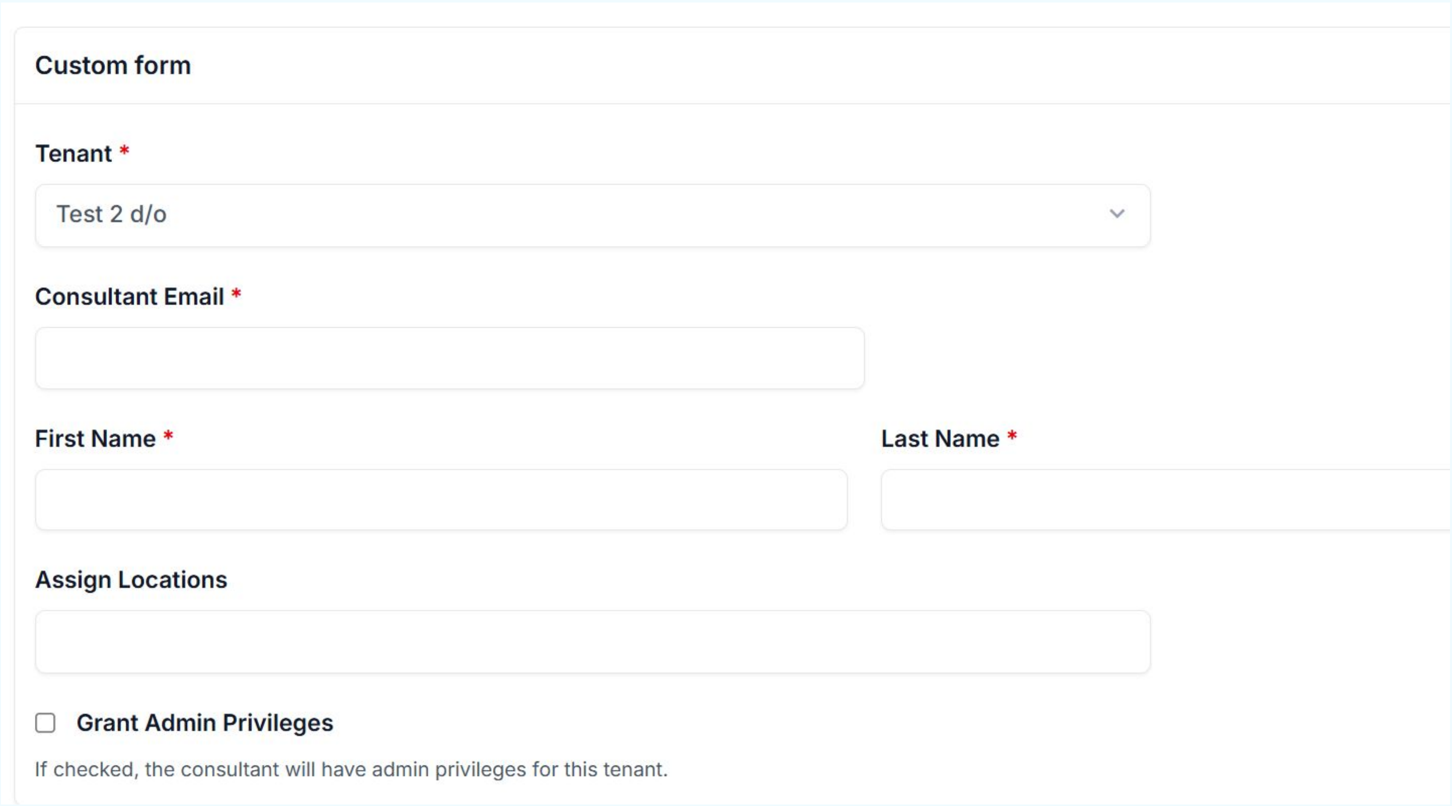
For the 2. consultant. Click **'plus+'**.

Link the Consultant to the specific **Tenant** (Location) you configured in the previous slide.

Consultant Onboarding (Personnel)

Step 3: Create Consultants

1. **Tenant** *: A mandatory field. Choose your tenant (Fachstelle).
2. **Consultant Email** *: A mandatory text input field for the consultant's work email address.
3. **First Name** *: A mandatory text input field for the user's first name.
4. **Last Name** *: A mandatory text input field for the user's last name.
5. **Assign Locations**: Select the specific work locations the consultant is working.
6. **Grant Admin Privileges**: Ensure it is Unchecked: Make absolutely sure that the box is not checked (i.e., it must be empty or deselected).

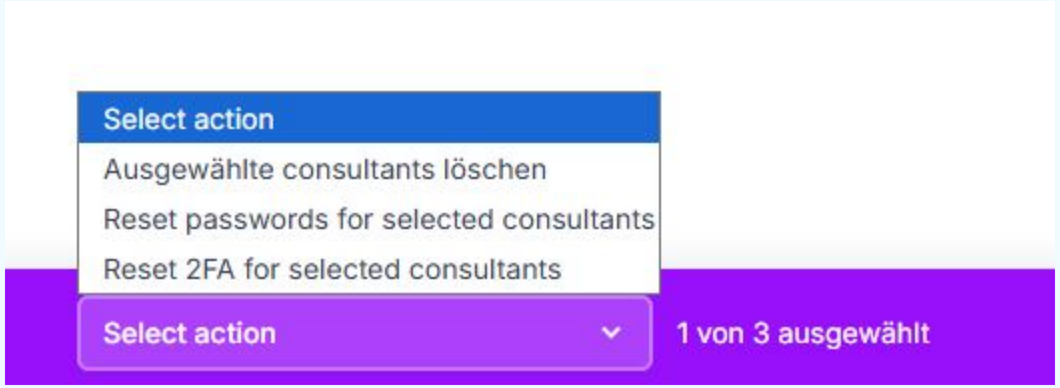


Link the Consultant to the specific **Tenant** (Location) you configured in the previous slide.

Managing Existing Consultants

Once consultants are registered in the system, they can be managed via a list view:

- **Selection:** You can check the box for one or multiple consultants in the list (the screenshot indicates "1 of 3 selected").
- **Available Actions:**
    - **Delete selected consultants:** Removes the selected consultant accounts (e.g., if an employee leaves the organization).
    - **Reset passwords for selected consultants:** Likely triggers a password reset email to the selected users.
    - **Reset 2FA for selected consultants:** Resets the Two-Factor Authentication settings (useful, for example, if an employee has lost their mobile device).



Link the Consultant to the specific **Tenant** (Location) you configured in the previous slide.

Result Information

These texts are strictly **supplementary**. The text entered here acts as an additional service (explanation, advice) and does **not** overwrite or delete any existing data.

1. Select Result Option (Option *)

- Use the search field to find the exact combination of pathogen and result (e.g., *Neisseria… - negative*).
- This specific technical result triggers the display of your text.

2. Select Language

- Click on the respective language tab (e.g., **en**, **de**) to define the text for that specific language version of the frontend.

3. Enter Text & Links (Information Text)

- **Content:** Enter the information intended for the patient (e.g., behavioral recommendations, explanations, next steps).
- **Web Links:** You can include clickable links to external websites, PDF brochures, or appointment booking pages.

4. Define Scope (Locations *)

- Add the locations where **this specific text** should appear.
- **Location Flexibility:** You can define different texts for different locations.
  - *Example:* Location A displays a link to a local counseling center, while Location B displays a general hotline number. Simply create separate entries for each.

Link the Consultant to the specific **Tenant** (Location) you configured in the previous slide.

Ad tags

Create and configure labels ("Tags") for better categorization, filtering, and identification of records.

1. Define Label Name (Name *)

- Enter a unique and descriptive name for the tag (e.g., *"VIP"*, *"Urgent"*, *"Employee"*).

2. Internal Notes (Note)

- You can add an optional description here.

3. Control Availability (Available in *)

- Define in which areas or locations this tag is allowed to be used.
- Enter the location and confirm by clicking the **+ button**.

4. Assign Ownership (Owner *)

- Use the dropdown menu to define the owner.
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