A MITEL
PRODUCT
GUIDE

Mitel Virtual Care Collaboration Service

Mitel Virtual Care Collaboration Service Tenant Administration

Administrator Documentation
09/2024

A31003-V9910-M102-11-76A9

Contents

1 Overview

Mitel Virtual Care Collaboration Service Administration app is a web-based interface that allows you to manage Mitel Virtual Care Collaboration Service. This guide describes how to make use of the Administration app as a tenant administrator.

A tenant in Virtual Care Collaboration Service can either map to a complete organization or a specific unit, department, or other entity within an organization. A tenant can have subordinate (child) tenants which in turn can have further child tenants under them, thus establishing a tenant hierarchy. The tenant hierarchy can have up to 4 levels.

As a tenant administrator, with the administration app you can easily:

- View in the tenant hierarchy your tenant, its ancestors and descendants (if any).
- Create and manage subordinate tenants under your tenant at any level in the tenant hierarchy, up to level 4.
- Select a tenant to work on; this can be either your own tenant or a subordinate tenant.
- Perform administrative tasks for a selected tenant, such as:
  - Create and manage users: practitioners, staff members, agents, users confirming appointments and tenant administrators.
  - Move users to another tenant.
  - Create and manage virtual waiting rooms and assign users to them.
  - Search and download information for consultations booked via the Virtual Care Collaboration Service.
  - View metrics.

If you are an administrator of the root-level tenant you can perform additional tasks, such as:

- Create and manage levels in the tenant hierarchy.
- Customize settings for chat sessions; the configurations are applied both to the root tenant and any subordinate tenant.
- Configure and enable or disable tenant-wide Single Sign On; the configuration is applied both to the root tenant and any subordinate tenant.
- Configure appointment settings for a root tenant or a subordinate tenant. This includes the configuration of the data processing agreement and the customization of automated appointment reminders.

2 Accessing Virtual Care Collaboration Service Administration app

2.1 Logging in with your Virtual Care Collaboration Service credentials

You can log in to the Virtual Care Collaboration Service Administration app using your Virtual Care Collaboration Service account credentials.

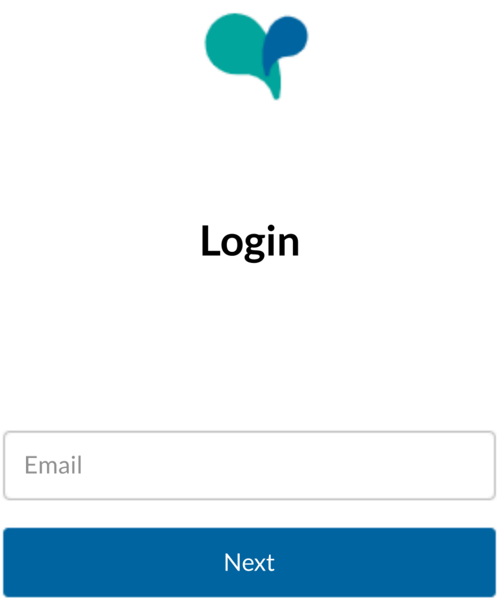
Step by Step

1) Open a web browser and enter the address (URL) of the Virtual Care Collaboration Service Administration app as provided by your organization.

The URL has the format: https://<Virtual Care Collaboration Service domain name>/admin

For example, if the system URL is https://vccs.example.com, the Admin app is available at https://vccs.example.com/admin.

2) Enter the email address associated with your account and click **Next**.



3) Enter the password associated with your account.

If you can't remember your password, click **Forgot my password**, enter the email address associated with your account, and then click **Request a reset link**. An email with a link to reset your password will be sent to you. For more information, see Resetting your password on page 7.

4) Click **Login**.

When logged in, your avatar appears in the bottom left corner of the screen.

In the left-hand navigation menu of the Administration app, just below the **Tenant Selection** option, you can see the name of your own tenant. This is default tenant selected for you to work on. You can easily switch to a subordinate tenant (if any) as described in Selecting a tenant to work on on page 13.

2.2 Logging in with Single Sign On (SSO)

Single Sign On Authentication (SSO) allows you to log in to multiple applications using a single set of credentials. If SSO has been enabled for your organization or tenant in Virtual Care Collaboration Service, you can use your organizational account to log in to the Virtual Care Collaboration Service Administration app.

Step by Step

1) Open a web browser and enter the address (URL) of the Virtual Care Collaboration Service Administration app as provided by your organization.
2) Enter the email address associated with your account and click **Next**.
3) You are redirected to the SSO provider's login page. On this page, enter your organizational credentials.

After successful authentication, you are redirected back to the Virtual Care Collaboration Service Administration app. Your avatar appears in the bottom left corner of the app.

In the left-hand navigation menu of the Administration app, just below the **Tenant Selection** option, you can see the name of your own tenant. This is default tenant selected for you to work on. You can easily switch to a subordinate tenant (if any) as described in Selecting a tenant to work on on page 13.

2.3 Resetting your password

You can reset your password if you forget it.

Prerequisites

No SSO is enabled for your organization or tenant in Virtual Care Collaboration Service.

Step by Step

1) On the Virtual Care Collaboration Service login page, click **Forgot my password**.
2) Enter the email address associated with your account and click **Request a reset link**.
   An email with a link to reset your password will be sent to you.
3) Go to your email inbox and open the email with the subject **Reset password** from Virtual Care Collaboration Service.
4) Click the link in the email.
5) Enter your new password in the **New password** field.
6) Enter your new password again in the **Confirm password** field.
7) Click **Reset**.

NOTICE: The password must conform to the password policy defined for your Virtual Care Collaboration Service. If it does not, an error message appears showing the password policy requirements.

2.4 Logging out

To log out at any time:

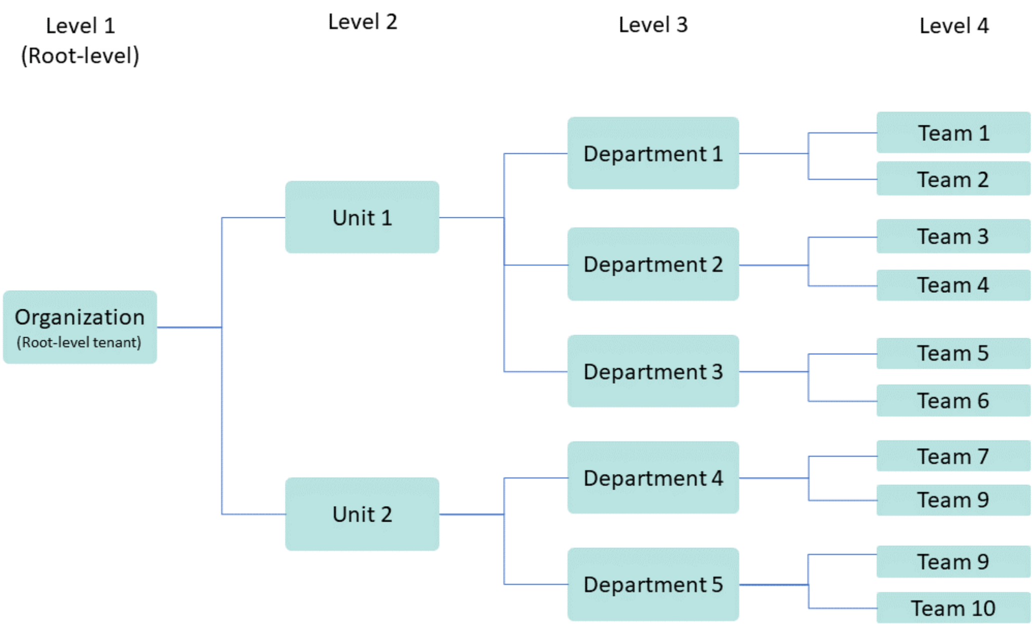
Step by Step

1) Click your avatar in the bottom left corner of the screen.
2) Select **Log out** from the drop-down list.

3 Multi-tenancy support and Tenant Hierarchy

Virtual Care Collaboration Service supports multiple tenants. A tenant can either map to a complete organization (or a company) or a specific unit, department, or other entity within the organization. A tenant can have subordinate (child) tenants which in turn can have further child tenants under them, thus establishing a tenant hierarchy. The tenant hierarchy can have up to 4 levels starting with level 1.

The following figure depicts an example four-level tenant hierarchy.



A tenant without a parent is the root-level tenant. Only system administrators can create root-level tenants. System administrators can also create one or more administrators for a root-level tenant.

Root-level tenant administrators can manage (add, edit, remove) levels in the tenant hierarchy.

All tenant administrators can:

- create and manage subordinate tenants under their tenants at any level, up to level 4
- administer their own tenant and subordinate tenants (if any).

3.1 Managing tenant hierarchy levels

The tenant hierarchy can have up to 4 levels, starting from level 1 down to level 4.

Level 1 is automatically created upon creation of the root-level tenant.

As a root-level tenant administrator, you can add, rename or remove a level from the tenant hierarchy.

3.1.1 Adding a level

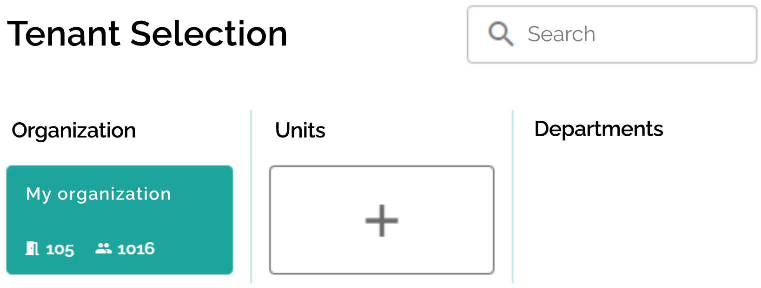
You can add new a level in the tenant hierarchy, up to level 4.

Prerequisites

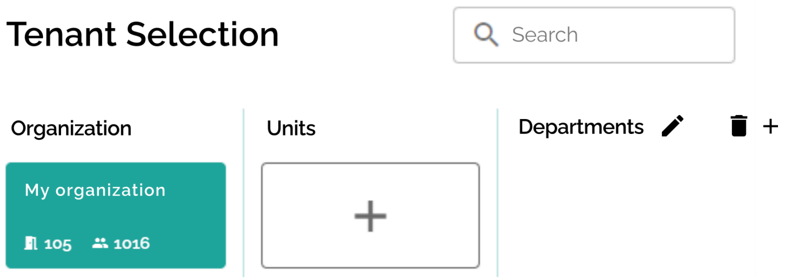
You are an administrator of the root-level tenant.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
   The following figure depicts an example three-level tenant hierarchy, containing only one tenant: the root-level tenant.



2) Hover over the name of the last level in the hierarchy, and click the + plus button on the right.



The new level is created and added to the hierarchy.

By default, the new level is named `Unnamed` but you can easily rename it.

3.1.2 Renaming a level

You can rename a tenant hierarchy level at any time.

Prerequisites

You are an administrator of the root-level tenant.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
2) Hover over the name of the level you want to rename and click on the right.
3) Enter the new level name and click out of the name field to save.

3.1.3 Removing a level

You can remove a level from the tenant hierarchy, if it contains no tenants. You can remove levels one by one, from the deepest in the tenant hierarchy to the highest, apart from level 1.

Prerequisites

- You are an administrator of the root-level tenant.
- The level you want to remove contains no tenants.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
2) Hover over the name of the last level in the hierarchy and click on the right.

The level is removed from the hierarchy.

3.2 Managing tenants

As a tenant administrator, you can:

- create subordinate tenants under your tenant and, if required, create further subordinate tenants under them
- view in the tenant hierarchy your own tenant, its ancestors and descendants (if any)
- edit or delete subordinate tenants
- search for your own tenant or subordinate tenants by name
- select a tenant to work on (own tenant or subordinate tenants).

3.2.1 Creating a tenant

You can create subordinate (child) tenants under your tenant at any level, up to level 4.

Prerequisites

- The tenant hierarchy level at which you want to create the new tenant exists.
- Make sure that one of the following conditions is met:
  - You are an administrator of the tenant that you want to add a subordinate tenant to, or
  - You are an administrator of one of its ancestors in the tenant hierarchy.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
The tenant hierarchy is displayed.
2) Browse for and locate the tenant that you want to add a subordinate tenant to.

3) Locate the next level in the tenant hierarchy, that is the level at which you want to create the new tenant, and click the + plus button below its name. The **Create new tenant** pop-up window appears.
4) Enter a name for the new tenant.
5) Click **Create**.

The new subordinate tenant is created and added to the tenant hierarchy.

3.2.2 Navigating the tenant hierarchy

You can navigate the tenant hierarchy to see how tenants are related to each other and understand the organization structure that a tenant is part of. You can also select a tenant in the tenant hierarchy to view its contents.

You can view in the tenant hierarchy only your own tenant, its ancestors and descendants (if any).

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
   The tenant hierarchy is displayed.

   The following information is displayed for each tenant.

   - Tenant name
   - Number of rooms
   - Number of users

     The number of rooms includes the number of rooms in all subordinate tenants under this tenant. Similarly, the number of users includes the number of users in all subordinate tenants under this tenant.
2) Browse for and select the tenant you want to view.

   > **NOTICE:** You can only select your own tenant or a subordinate tenant.

   In the tenant hierarchy, the selected tenant is colored green and all its ancestors (if any) are colored light green.

3.2.3 Renaming a tenant

You can rename a tenant in the tenant hierarchy at any time.

Prerequisites

- The tenant you want to rename is a subordinate of your own tenant.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.

2) Hover over the tenant you want to rename and click .
   The **Edit tenant** pop-up window appears.
3) Enter the new tenant name and click **Save**.

3.2.4 Deleting a tenant

You can delete a tenant from the tenant hierarchy if the tenant has no subordinate tenants. Deleting a tenant will delete all resources (users or rooms) assigned to it.

Prerequisites

- The tenant you want to delete is a subordinate of your own tenant.
- The tenant you want to delete has no subordinate tenants.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
2) Hover over the tenant you want to delete and click .
3) Select **OK** to confirm.
4) If the tenant has resources assigned to it, you will be promoted again to confirm the deletion. Select **OK** to confirm.

The tenant is deleted from the tenant hierarchy. Any resources assigned to the tenant are also deleted.

3.2.5 Searching for a tenant

You can search for a tenant (own tenant or subordinate tenants) by its name.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
   The tenant hierarchy is displayed.
2) Click **Search** and type the name of the tenant you want to find.

   Search results appear dynamically as you type. They include matches that contain the search term, exactly as specified, but only when the search term is used at the beginning of a tenant name.

   Below a tenant in the search results, you can see the names of all its ancestors (if any).
3) To clear your search results or return to the tree list of tenants and subordinates, delete the search term.

3.2.6 Selecting a tenant to work on

In the left-hand navigation menu of the Virtual Care Collaboration Service Administration app, just below the **Tenant Selection** option, you can see the name of the tenant you can currently work on; you can create and manage users and rooms, download information for consultations booked via the Virtual Care Collaboration Service, view metrics and more for the selected tenant.

By default, when you log in to the Administration app, the tenant selected for you to work on is the tenant that you are an administrator of.

You can select another tenant to work on at any time.

Prerequisites

The tenant you want to switch to is a subordinate of your own tenant.

Step by Step

1) From the left-hand navigation, select **Tenant Selection**.
The tenant hierarchy is displayed.
2) Do one of the following:
   - Browse for and select the tenant you want to work on.
   - Click **Search** and type the name of the tenant you want to find. Then, click to select a tenant from the search results.

In the tenant hierarchy, the selected tenant is colored green and all its ancestors (if any) are colored light green.

In the left-hand navigation menu of the Administration app, just below the **Tenant Selection** option, you will see the name of the tenant that you have selected.

Next steps

You can now start administrating the newly selected tenant.

4 User management

As a tenant administrator, you can view, search for, create, edit or delete users using the Virtual Care Collaboration Service Administration App.

You can create, edit or delete users for the currently selected tenant.

You can view and search for users in the currently selected tenant and its subordinates (if any).

You can also move users from one tenant to another.

4.1 User roles

Virtual Care Collaboration Service users can have one or more of the following roles:

- **Practitioner**: A practitioner is any person who provides heatlhcare services, such as doctor, nurse, allied health or other type of healthcare practitioner.

  Doctors have the formal qualifications of a medical doctor (MD) and provide virtual consultation services; other practitioners prepare patients for the consultation appointment with the doctor.

  All practitioners can have calls with patients as well as access and update their Electronic Health Records (EHR).
- **Staff**: Staff members carry out administrative tasks in Virtual Care Collaboration Service like scheduling appointments, managing the patient status for an appointment, arranging follow-ups, and more.

  They cannot have calls with patients or update the patient's records.
- **Agent**: Agents receive calls from patients who want to request an appointment. They can issue and review appointment requests.

  Do not use - Reserved for future use.
- **Confirm appointments**: Users with this role participate in the appointment request workflow.

  Do not use - Reserved for future use.
- **Administrators**: Administrators are able to administrate an Virtual Care Collaboration Service tenant and any subordinate tenants via the Administration app.

Practitioners and staff members can access and use the Virtual Care Collaboration Service app.

Administrators can access and use the Virtual Care Collaboration Service Administration app.

4.2 User authentication

Virtual Care Collaboration Service can be configured to authenticate users in any of the following two ways:

1 Do not use. Reserved for future.

- **Internal authentication**: This is the default authentication method for Virtual Care Collaboration Service. It uses an email and password to authenticate users.
- **SSO SAML Authentication**: This method authenticates users against a remote service, known as a SAML Identity Provider (IdP).

4.3 Creating a single user

You can create a single new user at any time.

Step by Step

1) From the left-hand navigation, select **Users**.

2) Click at the top right, then select **Create new user** from the drop-down menu.
The **Create new user** pop-up window appears.

3) Enter the following required information for the new user:

a) **First name**

b) **Last name**

c) **Email**

4) If Virtual Care Collaboration Service has been configured to authenticate users internally, enter a **Password** for the user.

This field is visible and required when internal authentication is used.

> **NOTICE:** The password must conform to the password policy defined for your Virtual Care Collaboration Service. If it does not, an error message appears showing the password policy requirements.

5) Optionally, enter a job **Title** for the user.

6) From the **Role** drop-down menu, select one or more roles for the user.

For information about the different user roles, refer to User roles on page 15.

7) Select a **Language** from the drop-down menu.

8) Tick the **Doctor** checkbox, if the user is a doctor.

9) Check the **Tenant name** under which the user will be created.

10) Optionally, enter the **Practitioner ID**.

The Practitioner ID can be used to reference a practitioner from another, external system.

11) If Virtual Care Collaboration Service has been configured with SSO SAML authentication, enter the **SAML ID** for the new user.

This field is visible when SSO SAML authentication is used.

12) Click **Create**.

The new user is created and added to the list of users for the selected tenant.

4.4 Creating multiple users at once

You can create multiple users at once by using a Comma-Separated Values (CSV) file.

Step by Step

1) Setup the CSV file that contains the users' data:

a) Create a CSV file with the following header row:

```
#email;practitionerId;samlId;prefix;firstname;
lastname;suffix;language;jobTitle;isMD;password;
permissions;tenants;
```

The header row contains the following fields:

Field	Description
#email	Required. User's email address
practitionerId	ID to be used to reference the practitioner from another, external system
samlId	User's SAML ID
prefix	Title prefixing the user's name, e.g.: `Mr`, `Mrs`, `Miss`, `Ms`
firstname	Required. User's first name
lastname	Required. User's last name
suffix	User's last name suffix
language	User's language
jobTitle	User's job title
isMD	Set to `true` if the user is a doctor, otherwise set to `false` or leave empty
password	Required if Virtual Care Collaboration Service has been configured with internal authentication. User password
permissions	Required. Roles(s) assigned to the user, separated with comma (,). Available roles: • PRACTITIONER • STAFF • AGENT • ADMIN • APPOINTMENT_REQUEST_ CONFIRMATION
tenants	Tenant under which the user will be created.

b) Fill-in subsequent rows with data for all the users you want to create.

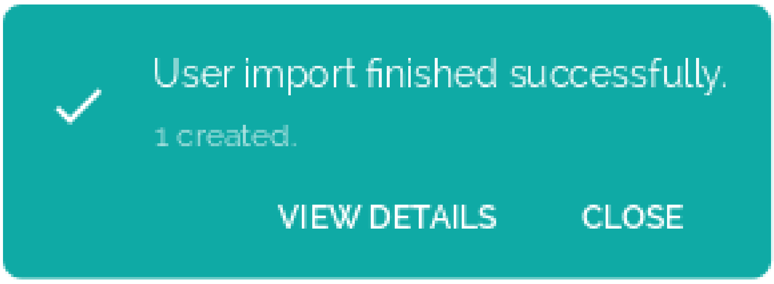
Use one row per user. Use as many rows as required and leave all subsequent rows blank.

c) Save the file as CSV.

2) Open the Virtual Care Collaboration Service Administration app and from the left-hand navigation select **Users**.
3) Click at the top right, then select **Bulk import** from the drop-down menu.
4) Browse for and select the CSV file you have setup in step 1 and click **Open**.

> **NOTICE:** After system validates the file, the import is initiated. Depending on the size of the CSV file, it may take some time to complete.

5) Check the import result in the pop-up notification that appears in the top-middle area of your app.



6) If you want to view the import details, click **VIEW DETAILS** in the pop-up notification.

4.5 Viewing users

You can view all users created in Virtual Care Collaboration Service for your organization.

Step by Step

1) From the left-hand navigation, select **Users**.
Users are displayed in a table sorted by their first name in ascending order.
The table displays the following information for each user:

Field	Description
First name	The user's first name
Last name	The user's last name
Email	The user's email address
Title	The user's job title
Role	The roles(s) assigned to the user, separated with comma (,). For information about the different user roles, refer to User roles on page 15.
Doctor	Indicates if the user is a doctor or not
Language	The user's language in Virtual Care Collaboration Service

Field	Description
Tenant	The tenant the user belongs to
Practitioner ID	The ID to be used to reference the practitioner from another, external system
SAML ID	The SAML ID for the user. This field appears if Virtual Care Collaboration Service has been configured with SSO SAML authentication. The value of the field is hidden.

The user list can be many pages long.

2) If you want to change the default number of users displayed per page, click the down arrow next to **Items per page** and select a value from the list.
The page refreshes to display the number of users you selected.

Related tasks

Filtering users on page 19

4.6 Searching for a user

You can search for a user using their first name, last name, email and title.

Step by Step

1) From the left-hand navigation, select **Users**.
A list of all users is displayed.

2) Click **Search** and type the information you want to find.

You need to type at least two letters in order to perform a search.

Search results appear dynamically as you type. They include matches that contain the search term, exactly as specified, but only when the search term is used at the beginning of the field value in which it is found.

Search results are sorted by the user's first name in ascending order.

3) To clear your search results or return to the entire user list, delete the search term.

Related tasks

Filtering users on page 19

4.7 Filtering users

You can filter users that appear on the **Users** page according to the following:

- Role
- Doctor
- Language

INFO: Columns that can be filtered are indicated with an arrow at the left of the column header.

Step by Step

1) Locate the column where you want to apply a filter.
2) Click the filter arrow ˅ in the column header to display a list of values to filter on.

   The list displays the different values the column can have plus the blank value.

   For example, the available filter options for column **Role** are:

   - <blank>
   - Practitioner
   - Administrator
   - Staff
   - Agent
   - Confirm appointments
3) Select the value you want to filter the column on.

   Selecting a value other than blank, filters the table to show only the relevant users.
   Selecting the blank value, clears the current filter from the column, if one is applied.

Related tasks

Viewing users on page 18
Searching for a user on page 19

4.8 Editing a user

You can edit information about a user.

If you change a user's password, an email notification of the password change will be sent to the user. Provide the new password to the user so they can log in.

Step by Step

1) From the left-hand navigation, select **Users**.

   A list of all users is displayed.
2) Locate the user you want to edit and click to the right.

   The **Edit user** pop-up window appears.
3) Edit the user details and click **Save**.

4.9 Creating Practitioner ID

The Practitioner ID is an identification number that can be used to reference a practitioner from another, external system. You can create a Practitioner ID for any user with role *Practitioner*.

Step by Step

1) From the left-hand navigation, select **Users**.
2) Locate the user for whom you want to crate a Practitioner ID and click to the right.

   NOTICE: The medication icon ( ) appears to the right of users who have been assigned the role of *Practitioner* and for whom no Practitioner ID has been defined so far.

   The Practitioner ID is created and the user information is automatically updated.

4.10 Downloading user information

You can download information about all users in a CSV file or information about a single user in a JSON file.

Step by Step

1) From the left-hand navigation, select **Users**.
   A list of all users is displayed.
2) To download information about all users, click on the top right.

   The information is downloaded in CSV format.

   The CSV file is output with semicolon-delimited items with the following header:

   ```
   #email;practitionerId;samlId;prefix;firstname;
   lastname;suffix;language;jobTitle;isMD;password;
   permissions;tenants;
   ```

#email	It displays the user's email address.
practitionerId	It displays the ID to be used to reference the user from another, external system
samlId	Not displayed.
prefix	It displays the title prefixing the user's name, e.g.: `Mr`, `Mrs`, `Miss`, `Ms`
firstname	It displays the user's first name
lastname	It displays the user's last name
suffix	It displays the user's last name suffix
language	It displays the user's language

jobTitle	It displays the user's job title
isMD	It displays whether the user is a doctor
password	Not displayed
permissions	It displays the roles(s) assigned to the user, separated with comma (,)
tenants	It displays the tenant the user belongs to

3) To download information about a specific user, click to the right of the user.

   User information is downloaded in JSON format. This includes the same information as the CSV file for the specific user but also data about the user's photo, and information about who created or modified the user and the time the user has been created.

4.11 Moving a single user to another tenant

You can move a single user from the currently selected tenant to another.

> **NOTICE:** You cannot move the last administrator of a tenant.

Prerequisites

- The tenant you want to move the user to is your own tenant or a subordinate tenant.

Step by Step

1) From the left-hand navigation, select **Users**.
   A list of all users is displayed in a table.
2) Locate the user you want to move to another tenant and do one of the following:
   - Click to the right of the user.
   - Select the checkbox next to the user, then click in the top right corner of the table.

   The **Move user to** pop-up window appears displaying the tenant hierarchy.
3) Browse for and select the tenant you want to move the user to.

   > **NOTICE:** You can only select your own tenant or a subordinate tenant.

4) Click **Move**.
5) Click **Confirm**.
6) Check the operation result in the pop-up notification that appears in the top-middle area of your app.

4.12 Moving multiple users to another tenant at once

You can move multiple users at once from the currently selected tenant to another.

NOTICE: You cannot move the last administrator of a tenant.

Prerequisites

- The tenant you want to move the users to is your own tenant or a subordinate tenant.

Step by Step

1) From the left-hand navigation, select **Users**.
   A list of all users is displayed in a table.
2) Select the checkbox next to the users you want to move to another tenant. To select all users in the table at once, select the checkbox next to the **First name** column header.
3) Click ⇄ in the top right corner of the table.
   The **Move users to** pop-up window appears displaying the tenant hierarchy.
4) Browse for and select the tenant you want to move the users to.

NOTICE: You can only select your own tenant or a subordinate tenant.

---

5) Click **Move**.
6) Click **Confirm**.
7) Check the operation result in the pop-up notification that appears in the top-middle area of your app.

4.13 Deleting a user

You can delete a user from the selected tenant when they no longer require access to Virtual Care Collaboration Service or when they leave your organization.

Step by Step

1) From the left-hand navigation, select **Users**.
2) Locate the user you want to delete and click to the right.
3) Select **OK** to confirm.

5 Room management

Virtual Care Collaboration Service is built around the concept of rooms.

A room is a virtual waiting room where patients wait to be seen by a healthcare practitioner. To see patients who are in the waiting room and interact with them, practitioners must be assigned to that room. A room can also have one or more staff members to carry out administrative tasks.

As a tenant administrator, you can manage rooms in the selected tenant and assign users to them.

You can create, edit or delete rooms for the currently selected tenant.

You can view and search for rooms, as well as assign users to a room in the currently selected tenant and its subordinates (if any).

5.1 Creating a room

You can create a virtual waiting room at any time.

Step by Step

1) From the left-hand navigation, select **Rooms**.

2) Click the + plus button at the top right.

The **Create new room** pop-up window appears.

3) Enter a **Name** for the room.

This field is required.

4) Enter a **Description** for the room.

5) From the **Doctor** drop-down menu, select one or more doctors to assign to the room.

6) From the **Nurses** drop-down menu, select one or more nurses to assign to the room.

7) From the **Staff** drop-down menu, select one or more staff members to assign to the room.

8) Check the **Tenant name** under which the room will be created.

9) Click **Create**.

The new room is created and added to the list of rooms for the selected tenant.

5.2 Viewing rooms

You can view all rooms created in Virtual Care Collaboration Service.

Step by Step

1) From the left-hand navigation, select **Rooms**.
   Rooms are displayed in a table sorted by room's name in ascending order.

   The table displays the following information for each room:

Field	Description
Name	The name of the room
Description	The description of the room
Doctor	The full names (first name, last name and last name suffix) of the doctors assigned to the room
Nurses	The full names of the nurses assigned to the room
Staff	The full names of the staff members assigned to the room
Tenant	The tenant the room belongs to

   The room list can be many pages long.

2) If you want to change the default number of rooms displayed per page, click the down arrow next to **Items per page** and select a value from the list.
   The page refreshes to display the number of rooms you selected.

5.3 Searching for a room

You can search for a room using its name or description or even the name(s) of the doctor, nurses or staff members assigned to it.

Step by Step

1) From the left-hand navigation, select **Rooms**.
2) Click **Search** and type the information you want to find.

   You need to type at least two letters in order to perform a search.

   Search results appear dynamically as you type. They include matches that contain the search term, exactly as specified, but only when the search term is used at the beginning of the field value in which it is found.

   Search results are sorted by the room's name in ascending order.
3) To clear your search results or return to the entire list of rooms, delete the search term.

5.4 Editing a room

You can edit the details of a room.

Step by Step

1) From the left-hand navigation, select **Rooms**.
   A list of all rooms is displayed.
2) Locate the room you want to edit and click to the right.
   The **Edit room** pop-up window appears.
3) Edit the room details and click **Save**.

5.5 Assigning users to a room

You can assign users to a room when you create it or afterward.

Only assigned users can see the list of patients who are in the waiting room.

Procedure

- To assign users to a room during creation:
  a) From the left-hand navigation, select **Rooms**.
  b) Click the + plus button at the top right.
     The **Create new room** pop-up window appears.
  c) Enter a **Name** for the room.
     This field is required.
  d) Enter a **Description** for the room.
  e) From the **Doctor** drop-down menu, select one or more doctors to assign to the room.
  f) From the **Nurses** drop-down menu, select one or more nurses to assign to the room.
  g) From the **Staff** drop-down menu, select one or more staff members to assign to the room.
  h) Check the **Tenant name** under which the room will be created.
  i) Click **Create**.
     The new room is created and the users you have specified are assigned to it.

- To assign users to a room after creation:
  a) From the left-hand navigation, select **Rooms**.
  b) Locate the room you want to assign users to and click to the right.
     The **Edit room** pop-up window appears.
  c) If needed, edit the room's **Name** and **Description**.
  d) From the **Doctor** drop-down menu, select one or more doctors to assign to the room
  e) From the **Nurses** drop-down menu, select one or more nurses to assign to the room.
  f) From the **Staff** drop-down menu, select one or more staff members to assign to the room.
  g) Click **Save**.
     Users you have specified are assigned to the room.

5.6 Deleting a room

You can delete a room from the selected tenant when it is no longer needed.

Step by Step

1) From the left-hand navigation, select **Rooms**.
2) Locate the room you want to delete and click to the right.
3) Select **OK** to confirm.

6 Consultations

As a tenant administrator, you can search for a patient who has a scheduled virtual consultation appointment or who has already completed a consultation with a practitioner via the Virtual Care Collaboration Service app. You can also download information about the patient's consultations.

Consultations must have been booked with a practitioner belonging to the selected tenant (or to any of its subordinate tenants).

You cannot view the electronic health records of the patients as these are stored in an external system and you are not allowed to access them.

6.1 Searching for a patient

You can search for a patient who has had or has an appointment for a virtual consultation by their exact first and last name or by their ID. The search is case-sensitive.

Step by Step

1) From the left-hand navigation, select **Consultations**.
2) Click **Search** and type the full name or ID of the patient you want to find.
   Patients matching the search criteria are displayed in a table. They are sorted by their first name in ascending order.
3) To sort the search results differently:
   - Click another column header to sort by the content of that column (by default in ascending order).
   - Click the same column header again to change the sort order.
4) To clear your search results, delete the search term.

6.2 Downloading the list of a patient's consultations

You can download the list of all scheduled consultation appointments for a specific patient, including past appointments, in a JSON file.

Step by Step

1) From the left-hand navigation, select **Consultations**.
2) Click **Search** and type the full name or ID of the patient you want to find.
3) Locate the patient in the search results and click to the right.
   The list of patient's consultations is downloaded in JSON format.

7 Metrics

Metrics help you monitor performance and troubleshoot issues with Virtual Care Collaboration Service.

You can access metrics for a selected tenant and any subordinates from the left-hand navigation menu of the Administration app by selecting **Metrics**.

The following metrics are available for display:

Metric	Description
Active Calls	Number of active calls
Practitioners Logged-in	Number of practitioners logged in to Virtual Care Collaboration Service
Patients in Waiting Room	Number of patients in waiting rooms
User license consumed[2]	Number of licenses consumed by logged-in practitioners Standard (blue line) Professional (red line)
User license consumed compared to configured limit	Number of licenses consumed compared to the total number of available licenses Standard (blue line) Professional (red line)

7.1 Viewing metrics

You can view the entire history for a metric in a specific date range.

Metrics are presented in the form of line graphs. Dots represent metric values recorded at different time points. Adjacent pairs of dots are connected by straight lines.

Step by Step

1) From the left-hand navigation, select **Metrics**.

   A line graph depicts the selected metric' s value over time.

2) Hover over a dot on the line graph to view the exact value.

   A tooltip is displayed that contains the date, time and metric value.

3) To change the metric shown in the graph:

   a) Click the **Metric** drop-down list and select the metric of interest.

   b) Click **Apply**.

   The graph refreshes to show the values of the newly selected metric over time.

2 A license is shown in the metrics only when it is assigned, and the tenant has started using it.

4) To change the date range:

a) Enter a date in the **From** field or click the calendar icon on the right of the field and select a date from the date picker.

b) Enter a date in the **To** field or click the calendar icon on the right of the field and select a date from the date picker.

c) Click **Apply**.

The graph refreshes to show the metric's value in the new date range.

Next steps

If you want to export the line graph to a pdf file, first save the line graph as image or take a screenshot of it, then print the image file to a pdf printer to produce a pdf document.

8 Settings

You can configure the settings of your Virtual Care Collaboration Service Administration app.

The **Settings** menu allows you to configure the settings of your Virtual Care Collaboration Service administration app or tenant.

You can open settings by clicking ⚙ **Settings** on the left-hand navigation menu.

- Use the **General** tab to:
  - Change the language settings of the Virtual Care Collaboration Service Administration app.
  - Configure chat settings.
  - Configure a test call for a root tenant.
- Use the **Authentication** tab to:
  - Configure Single Sign On (SSO) authentication for a root tenant.
- Use the **Appointments** tab to:
  - Enable and provide a Data Processing Agreement link to patients.
  - Customize the automated appointment reminders.

8.1 Changing the language settings

Virtual Care Collaboration Service Administration app currently supports the following languages:

- English
- German
- Spanish
- French
- Italian
- Dutch
- Catalan

You can change the language settings at any time.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
The **General** tab is displayed by default.

2) Locate the **Language** section.

3) Select your preferred language from the drop-down menu.
The language will change automatically to the one selected.

8.2 Configuring chat settings

As a root tenant administrator, you can configure settings for chat sessions in your tenant. You can specify the file types that can be attached to chat messages, the maximum number of files allowed in a single chat message and the maximum file size (in MB) per file.

Chat settings you make will apply to the root tenant and any subordinate tenant.

Prerequisites

You are an administrator of a root-level tenant.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
   The **General** tab is displayed by default.
2) Locate the **Chat** section.
3) In the **Accepted file types** field, enter one or more unique file type specifiers, separated by commas.

   These could be file extensions starting with a period ("."), like **.jpg,.png, .pdf**, or MIME type strings with no extensions, like **audio/*** (any audio file), **video/*** (any video file), **image/*** (any image file).
4) In the **Max files per message**, enter the maximum number of files allowed in a single chat message.

   The max file size per message must be between 1 and 20.
5) In the **Maximum file size** field, enter the maximum file size (in MB) per file in a chat message.

   The max file size must be between 1 and 100.
6) Click **Save**.

8.3 Configuring test call for a root tenant

You can make audio and video testing mandatory in your tenant. Patients are required to complete a test call before their virtual consultation with a practitioner.

Prerequisites

You are an administrator of a root-level tenant.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
   The **General** tab is displayed by default.
2) Locate the **Test call for patients** section.
3) Switch the **Test audio and video settings on start** slider to:
   - ON (blue) to make camera and microphone testing mandatory.
   - OFF (gray) to disable the testing.

     The default option is OFF.

4) Switch the **Require audio only** slider to:

- ON (blue) to make testing mandatory for audio only.
- OFF (gray) to make testing mandatory for both video and audio.

The default option is OFF.

NOTICE:

When **Test audio and video settings on start** is OFF, then **Require Audio only** is also disabled.

5) Click **Save**.

8.4 Configuring Single Sign On (SSO) authentication for a root tenant

By default, users in your tenant are able to access Virtual Care Collaboration Service using the authentication method configured system-wide for all users in your organization. This can be either internal authentication using email and password or an SSO SAML authentication.

As a root tenant administrator, you can configure and enable tenant-wide SSO SAML authentication for your tenant. This will override the default authentication method configured system-wide and it will allow users in your tenant and any subordinate tenant to access Virtual Care Collaboration Service using the corresponding authentication method. Users must have a valid user account in a SAML 2.0 Identify Provider (IdP) to log in successfully to Virtual Care Collaboration Service using SSO.

As a root tenant administrator, you can always log in to the Administration app using your Virtual Care Collaboration Service credentials. This serves as a fallback option in case the SSO method fails. This means that if system- or tenant-wide SSO has been enabled for you, you can log in with either your Virtual Care Collaboration Service credentials or your organizational credentials.

8.4.1 Configuring a SAML 2.0 identity provider

Configuring a SAML 2.0 Identity Provider (IdP) is the first step in the process of configuring tenant-wide SSO SAML 2.0 authentication for a root tenant.

Prerequisites

You are an administrator of a root-level tenant.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.

2) Select the **Authentication** tab.

3) In the **IdP identifier** field, enter a name for the identity provider.

4) In the **IdP entry URL**, enter the remote login URL that you received from the identity provider.

5) Click **Configure** to start configuring an IdP certificate.

6) On the **Configure IdP certificate** pop-up window, enter the contents of the certificate that you received from the identity provider, then click **Save**.

> **NOTICE:** The IdP certificate settings are not saved until you click **Save** at the bottom of the **Settings** page.

7) By default, the **Tenant Single Sign-on** slider is set to OFF (gray), which means that SSO is not enabled on the root tenant. Once you have set all required settings for your identity provider (IdP Identifier, IdP Entry url, and certificate), you can enable tenant-wide SSO if you want, by switching the **Tenant Single Sign-on** slider to ON (blue).
8) Click **Save**.

8.4.2 Editing a SAML 2.0 identity provider

You can edit the settings of a SAML 2.0 identity provider configured on your root tenant.

Prerequisites

You are an administrator of a root-level tenant.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
2) Select the **Authentication** tab.
3) If you want to replace the certificate configured for the identity provider with a new one, do the following:
   a) Click **Replace**.
   b) On the **Replace IdP certificate** pop-window, enter the contents of the certificate that you received from the identity provider, then click **Save**.

   > **NOTICE:** IdP certificate changes are not saved until you click **Save** at the bottom of the **Settings** page.

4) If you want to delete the certificate configured for the identity provider, do the following:
   a) Click 🗑 next to **Replace**.
   b) Click **OK** to confirm.
5) Edit the rest of the identity provider settings according to your needs.
6) Click **Save**.

> **NOTICE:** Deleting any of the identity provider settings will automatically disable the tenant-wide SSO if it was previously enabled.

8.4.3 Enabling or Disabling tenant-wide Single Sign On

You can enable or disable tenant-wide SSO authentication for a root tenant.

When tenant-wide SSO authentication is disabled (default), users in the tenant and subordinate tenants are able to access Virtual Care Collaboration Service using the authentication method configured system-wide for all users in your organization.

When tenant-wide SSO authentication is enabled, users in the tenant and subordinate tenants are able to access Virtual Care Collaboration Service using the corresponding authentication method. The authentication method configured system-wide for all users in your organization is bypassed.

Root tenant administrators can always log in to the Administration app using their Virtual Care Collaboration Service credentials. This serves as a fallback option in case the SSO method fails.

You can enable or disable tenant-wide SSO for a root tenant when you configure a SAML 2.0 identity provider or afterward. For more information on how to enable SSO when you configure a SAML 2.0 identity provider, please see Configuring a SAML 2.0 identity provider on page 33.

Prerequisites

- You are an administrator of a root-level tenant.
- All required settings for a SAML 2.0 identity provider (IdP Identifier, IdP Entry url, and certificate) have been configured.

To enable or disable a tenant-wide SSO after a SAML 2.0 identity provider has been configured on the root tenant, do the following:

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.

2) Select the **Authentication** tab.

3) Switch the **Tenant Single Sign-on** slider to:

   - ON (blue) to enable tenant-wide SSO authentication

     or

   - OFF (gray) to disable tenant-wide SSO authentication.

4) Click **Save**.

8.5 Configuring appointments

By default, patients who are using Virtual Care Collaboration Service for virtual consultations with their practitioners are not required to agree to a Data Processing Agreement (DPA) when checking in for their appointments. As a root tenant administrator, you can change this default setting and require patients' consent to the Data Processing Agreement as a condition for using Virtual Care Collaboration Service. Once the DPA setting is enabled, you can additionally add a link and a brief description of the DPA inside automated appointment reminders sent to patients.

Additionally, as a root tenant administrator, you can customize the automated SMS or Email reminders sent to patients when an appointment is created, updated, or canceled. If no customization is applied, the default reminder messages are used.

8.5.1 Configuring the Data Processing Agreement

You can enable the Data Processing Agreement (DPA) setting for a root tenant or a subordinate tenant and include a link to your DPA in messages sent to patients.

Prerequisites

You are an administrator of a root-level tenant.

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
2) Select the **Appointments** tab.
3) By default, the **Data Processing Agreement (DPA)** slider is set to OFF (gray), which means that the patients are not required to agree to the DPA when checking in for their appointment. Additionally, in that case, no DPA description appears in the appointment reminders sent to patients. If you want to enable the DPA, switch the **Data Processing Agreement (DPA)** slider to ON (blue).
4) If the DPA setting is enabled, you can configure the **DPA link** and **DPA description** setting as follows:
   a) In the **DPA link**, enter the link to your Data Processing Agreement.
   b) Check and update the **DPA brief description** if necessary.
5) Click **Save**.

8.5.2 Customizing automated appointment reminders

Virtual Care Collaboration Service sends automated SMS or email reminders to patients when an appointment is scheduled, updated, or canceled. The content in these messages is customizable, so you can change it to fit your requirements. If no customization is applied, the default messages are used.

When customizing messages for automated appointment reminders, you can use placeholders enclosed in brackets. Placeholders populate applicable content that is inserted in the appointment reminder. For example, if you were to use the `[practitioner]` placeholder, the name of the practitioner the appointment is with will be inserted within the reminder in place of the placeholder.

The following placeholders are available for use in appointment reminders:

Placeholder	Description
date	Date of the appointment.
DPA description	DPA brief description.
link	Appointment link.
practitioner	The name of the practitioner belonging to the selected tenant (or to any of its subordinate tenants).
time	Time of the appointment.

Custom appointment reminder messages are sent to patients in the language in which they are written. On the contrary, if the default messages are used in reminders, they are sent in the language configured for the tenant.

Prerequisites

You are an administrator of a root-level tenant.

You have selected the tenant for which you wish to configure appointments.

You can define a custom message for an appointment reminder as described below:

Step by Step

1) From the left-hand navigation, select ⚙ **Settings**.
2) Select the **Appointments** tab.
3) Edit the **Subject** of automated reminders if necessary.
4) Locate the appointment reminder type you want to customize and click the name to expand it (if not already).

   The appointment reminder type can be one of the following:

   - **Appointment created**
   - **Appointment updated**
   - **Appointment cancelled**
5) Click in the **Message** text field to edit the message as needed.
6) If you want to add a placeholder to the reminder subject or message, do the following:
   a) Position the cursor where you want to add a placeholder.
   b) Type `[` to open a menu with the available placeholder and select the placeholder you want to add.

   The placeholder is added automatically in the text input field in the form of `[placeholder]`
7) Review the **Preview** of your message to ensure it displays correctly.
8) Click **Save**.

8.6 Reporting an issue

If you are experiencing an issue with Virtual Care Collaboration Service Administration app, you can report it from within the app. This will send logs from the app to the Virtual Care Collaboration Service support team so they can help troubleshoot.

Step by Step

1) Click your avatar in the bottom left corner of the screen.
2) Select **Report issue** from the drop-down menu.
3) On the pop-up dialogue, click **Submit**.