

Passerelle Coach

Admin Guide

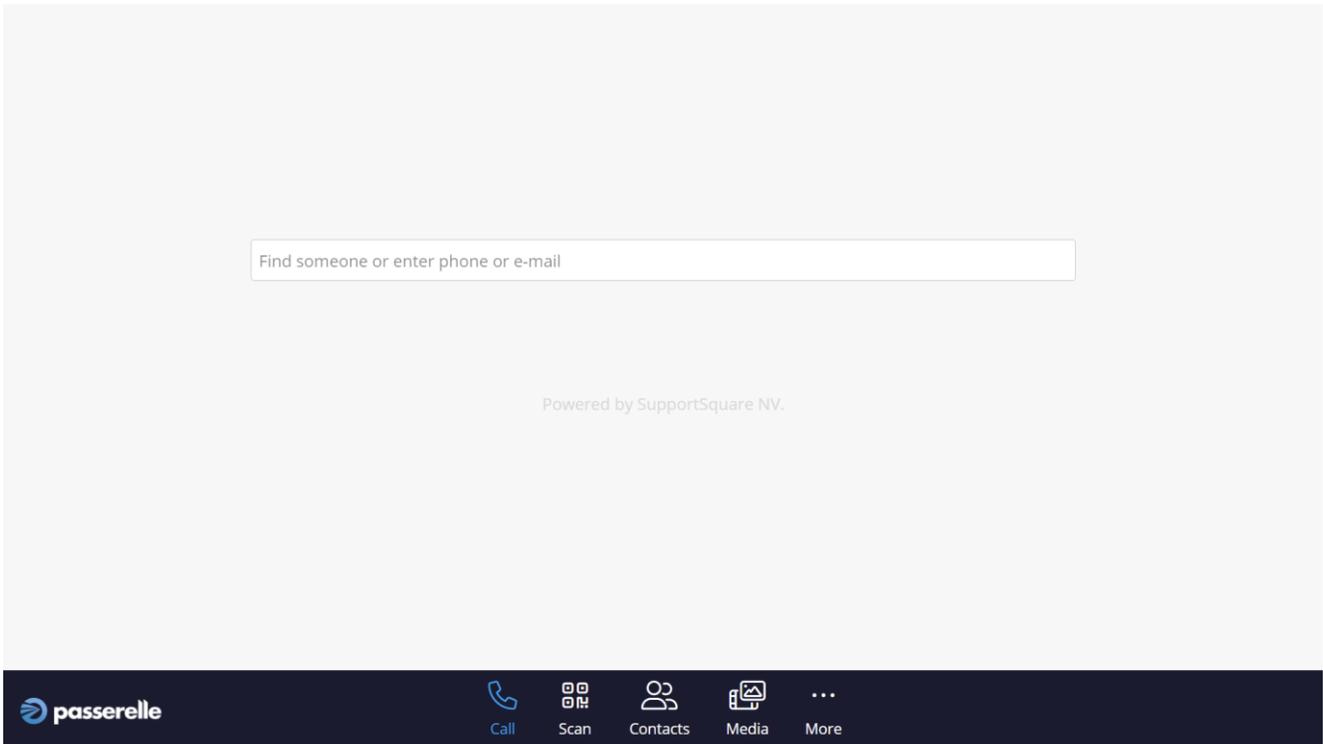
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Passerelle Coach

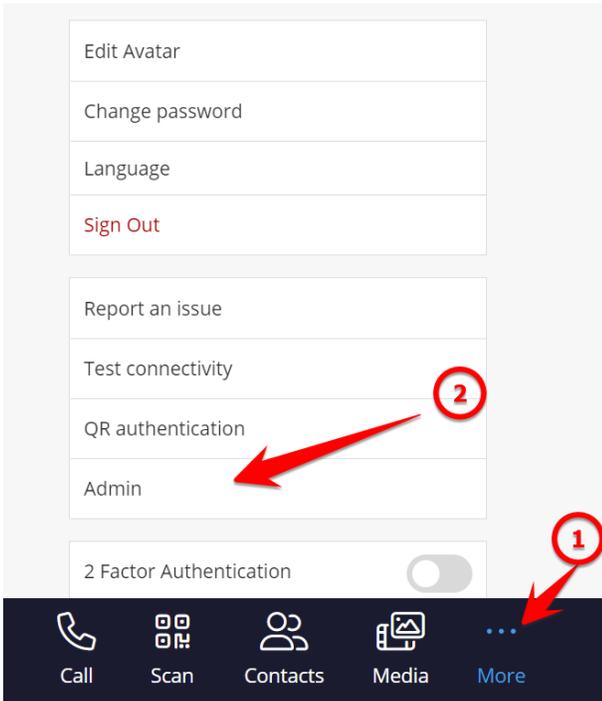
Guide for Administrators

Once logged in to your Passerelle Coach environment (web portal or app), it should look something like this:



Colors and logo may vary according to your own branding, if branding options are available to you.

1. Access Admin Console



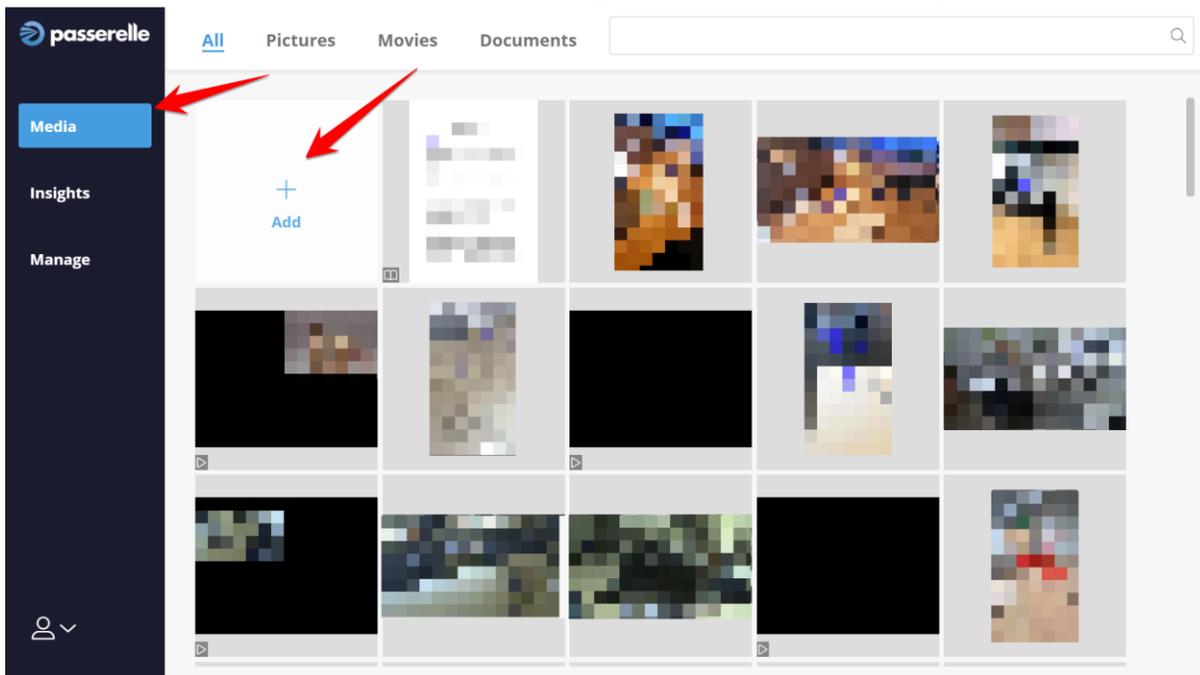
To access the admin console, click on “More”, then “Admin”.

The admin console should display this menu:



If you're not seeing the “Manage” option, it means you do not have Admin rights. In this case, contact the person in charge of Passerelle Coach to change your status.

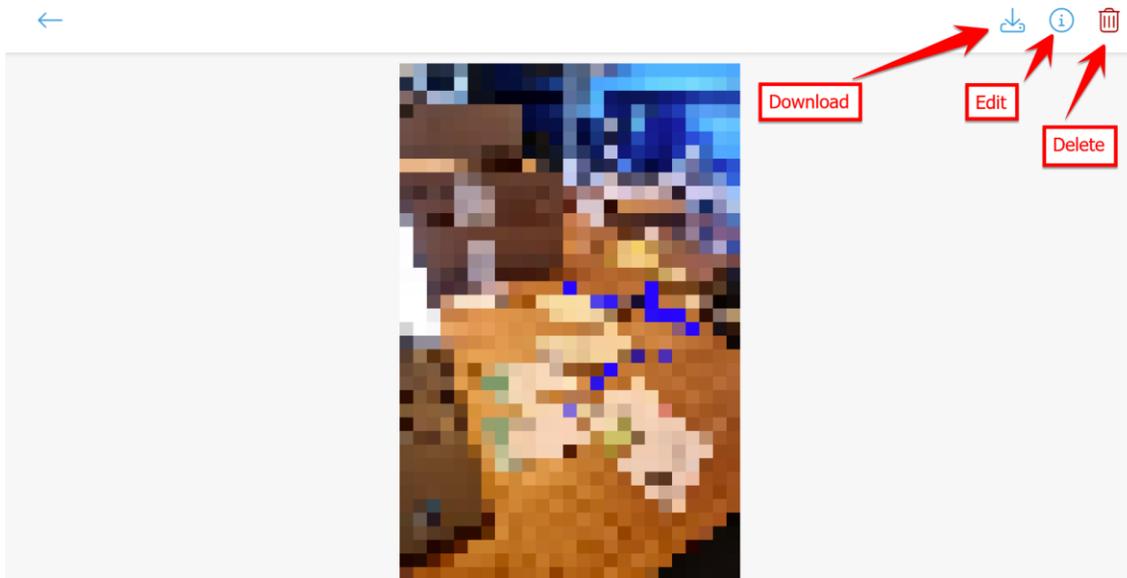
2. Manage Media Library



To access your cloud media library, click on "Media".

You will then see the Images, Videos and PDF documents saved in your media library.

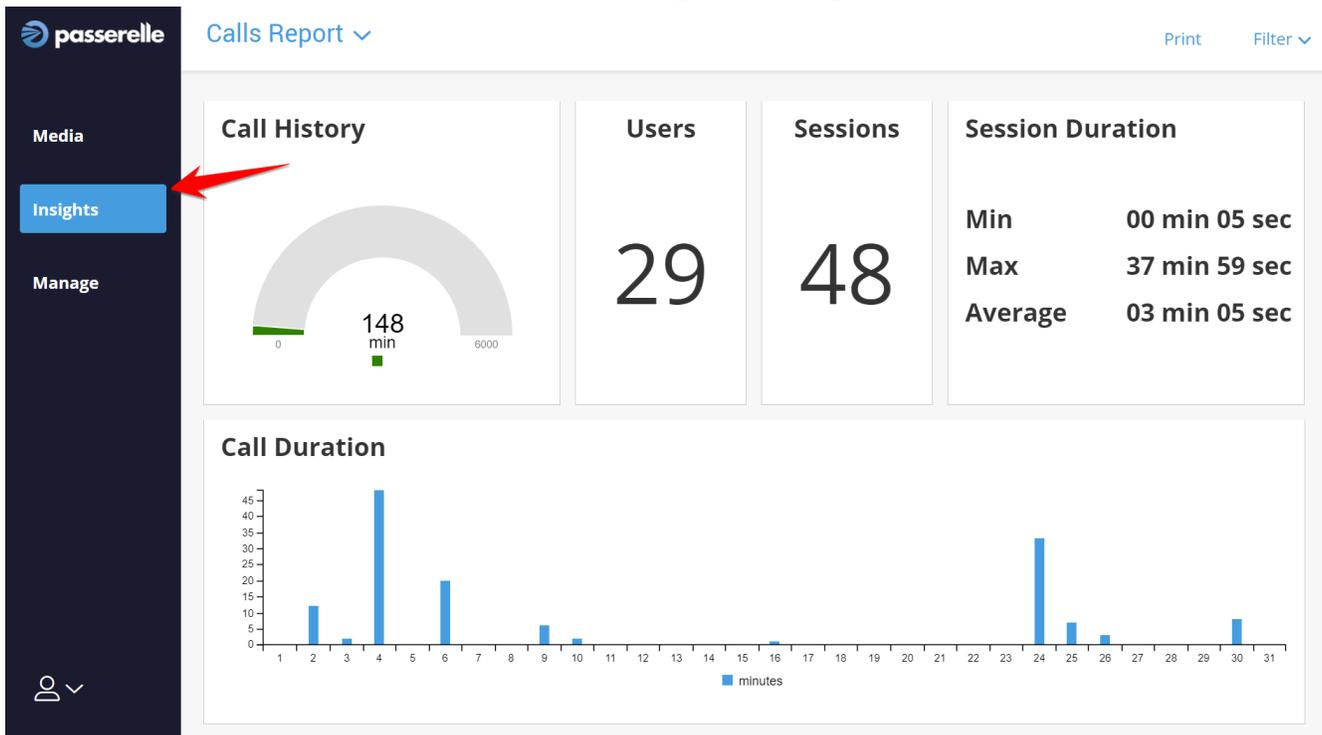
To add images, videos or pdf documents, click on "Add".



Clicking on a file gives you 3 options:

1. Download the file
2. Edit the information & description
3. Delete the file

3. Manage Usage



The “Insight” option gives you a dashboard of the usage stats of Passerelle Coach.

To refine this dashboard further, click on “Filter”

The filter dialog box includes the following fields:

- Site:** A dropdown menu currently set to "Gent".
- Period:** A dropdown menu currently set to "Current Month".
- User:** A search input field with a magnifying glass icon.

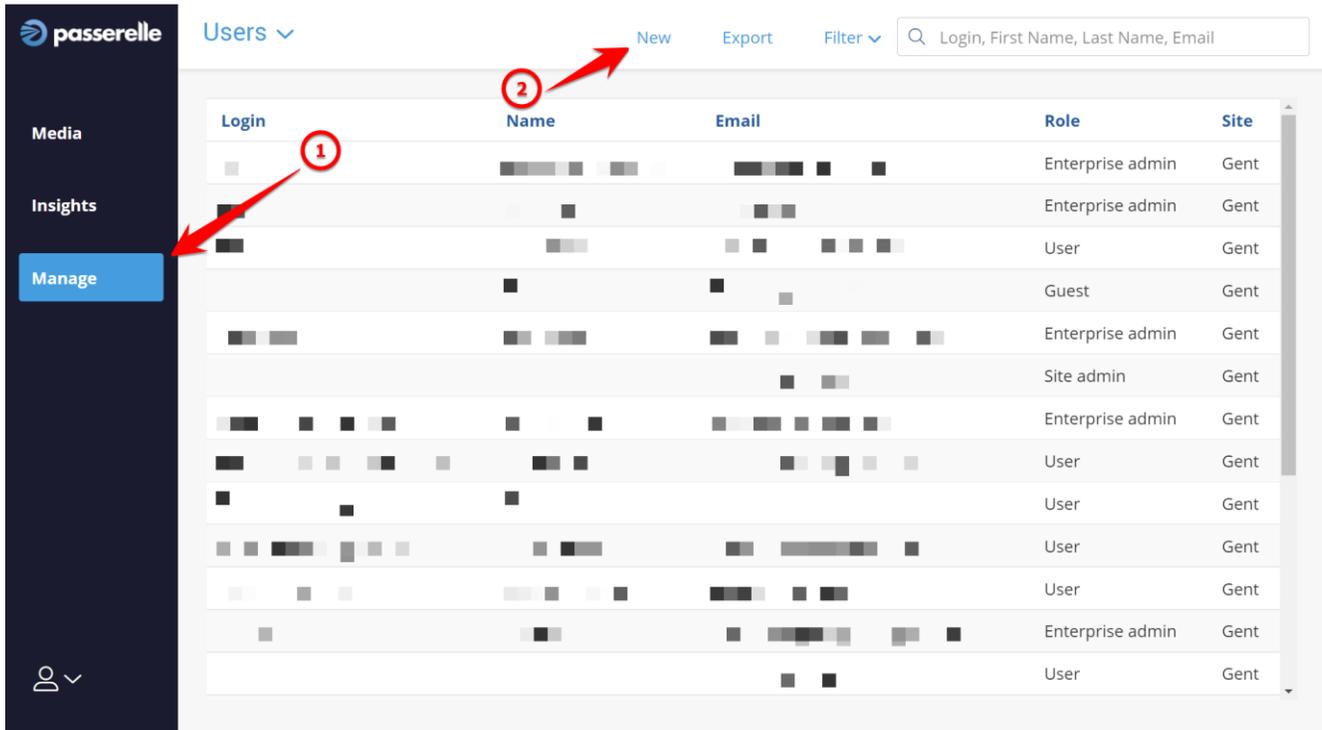
Buttons for "Cancel" and "Apply" are located at the bottom. A red arrow points to the "Filter" button in the top right corner of the dashboard.

You can then select the Site, Time Period and specific User.

Print

The “Print” option exports a PDF with the dashboard data.

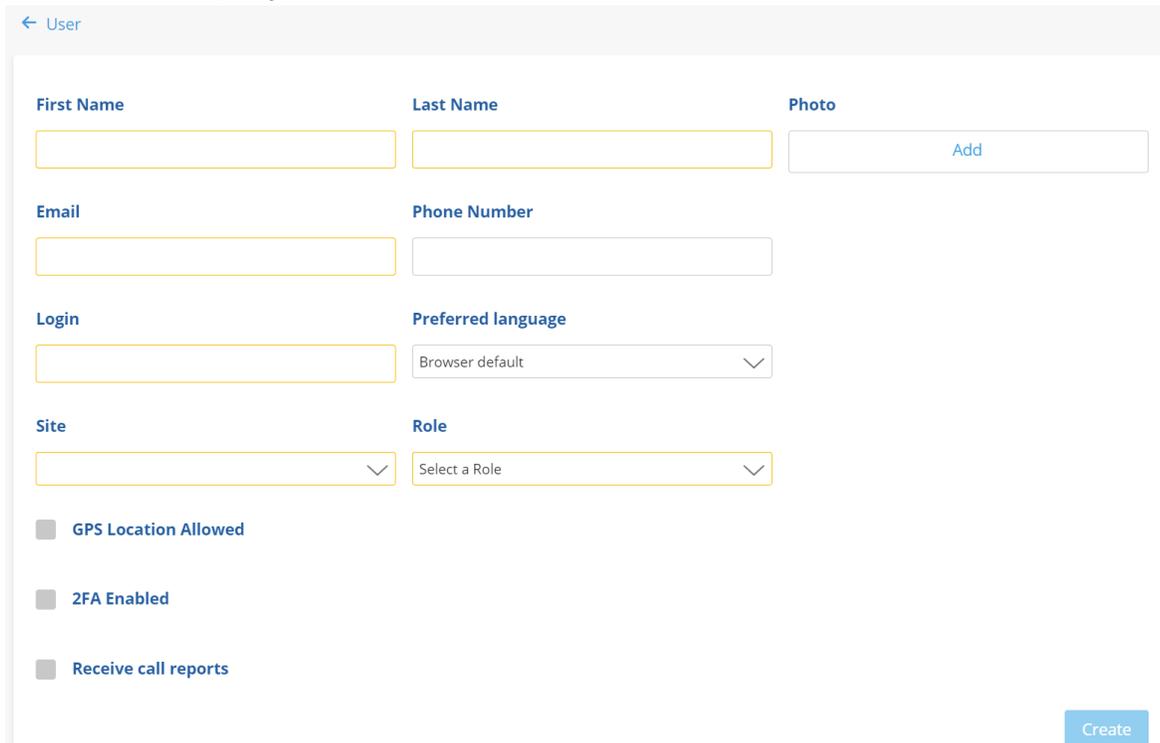
4. Manage Users



The screenshot shows the Passerelle user management interface. The left sidebar contains a 'Manage' button highlighted in blue. The main area displays a table of users with columns for Login, Name, Email, Role, and Site. A search bar at the top right contains the text 'Login, First Name, Last Name, Email'. Red arrows and circles highlight the 'Manage' button (1) and the 'New' button (2).

Login	Name	Email	Role	Site
			Enterprise admin	Gent
			Enterprise admin	Gent
			User	Gent
			Guest	Gent
			Enterprise admin	Gent
			Site admin	Gent
			Enterprise admin	Gent
			User	Gent
			Enterprise admin	Gent
			User	Gent

To add a new User, click on “Manage”, then “New”
It should display this console:



The screenshot shows the user creation form. The form includes fields for First Name, Last Name, Photo, Email, Phone Number, Login, Preferred language, Site, and Role. There are also checkboxes for GPS Location Allowed, 2FA Enabled, and Receive call reports. A 'Create' button is at the bottom right.

← User

First Name

Last Name

Photo

Email

Phone Number

Login

Preferred language

Site

Role

GPS Location Allowed

2FA Enabled

Receive call reports

The orange fields are mandatory, the grey fields optional (Photo, Phone Number, Preferred language).

Role

Select a Role 

- User
- Guest
- Enterprise admin
- Site admin



In the Role section, the "Guest" exists for invited users who do not belong to your organization. This role is a temporary one, it is unadvised to register someone with it.

Once the mandatory fields are filled, click on the "Create" button



And it will automatically send an invitation mail to the new user.



The invitation mail will only be valid for a few days.

The new user has to accept the invitation and set up his own password in order to use Passerelle Coach. Don't forget to check SPAM if the mail does not seem to arrive.

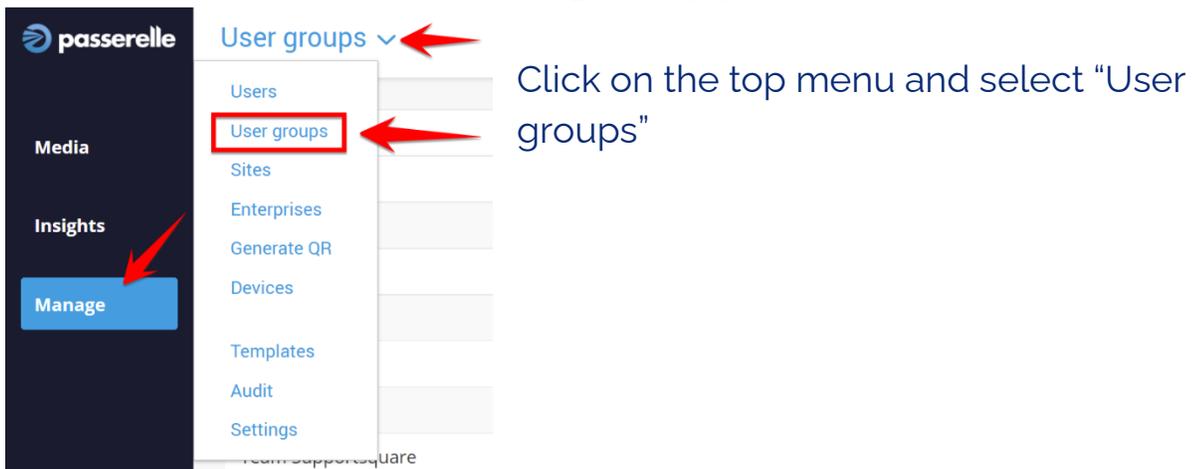
You can also export your list of users and filter them by using the buttons

Export

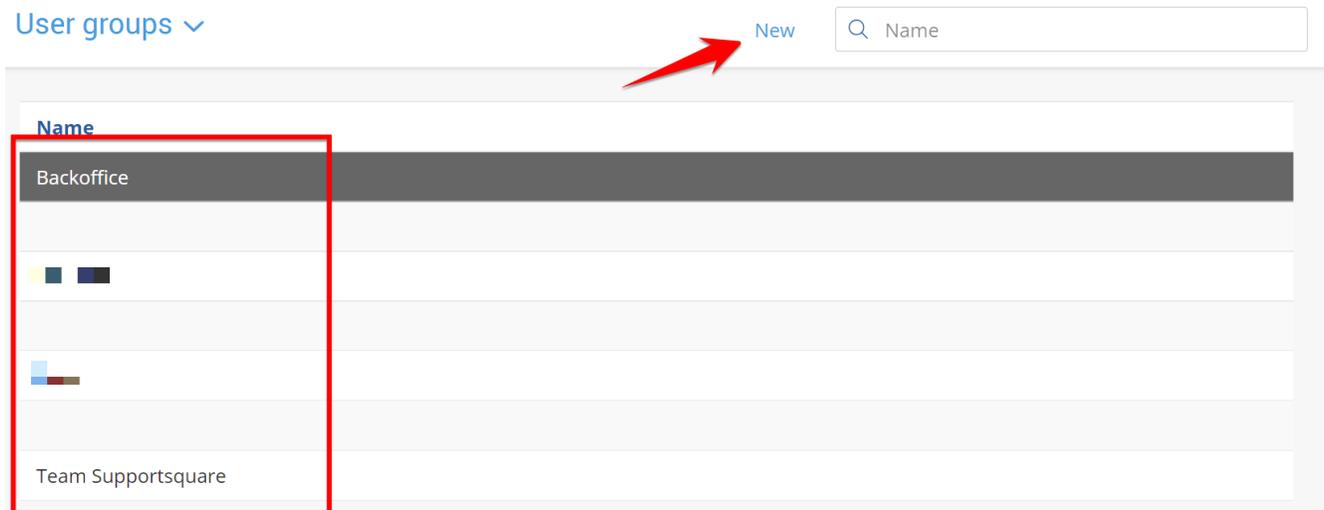
Filter 

"Export" and "Filter":

5. Manage Support Groups



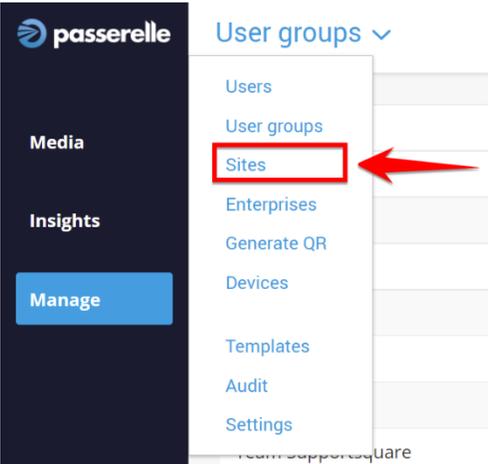
You can then Select a user group to add members or edit it, or create a new group:



Support groups are useful for queuing calls: it is possible to call a whole support group, and the first one to pick up "wins" the call.

You can also tie QR codes to a support group, more info on the Manage QR Codes section.

6. Manage Sites

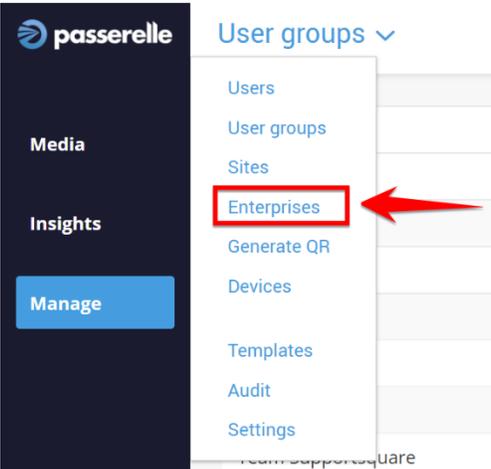


Click on "Sites"



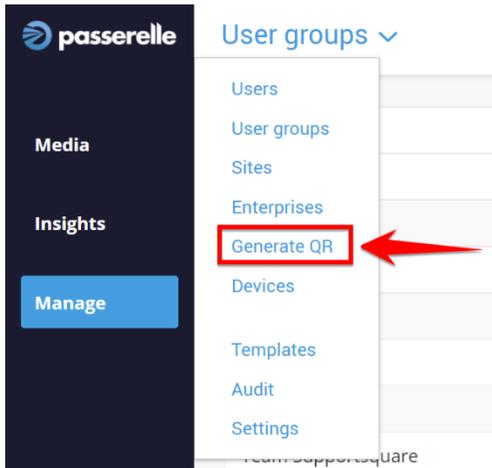
Your license is bound to a site. When creating new sites, make sure you have an additional license, otherwise users in the new site won't be able to use Passerelle Coach

7. Manage Enterprises



Click on "Enterprises"

8. Manage QR Codes



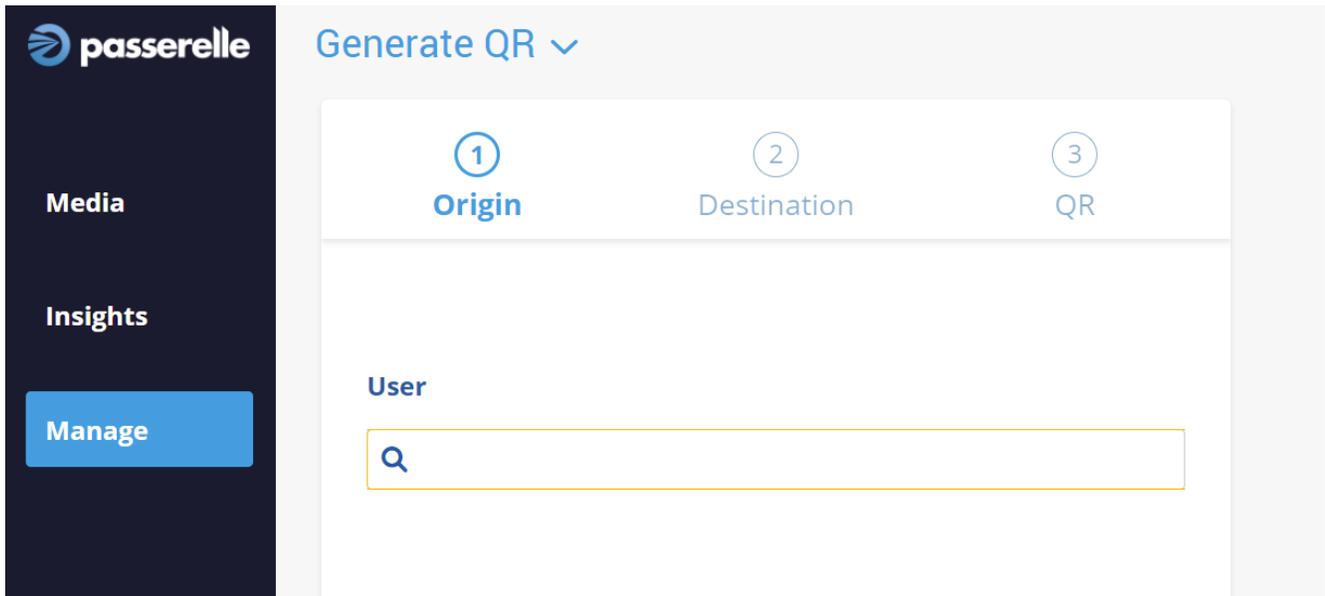
Click on "Generate QR"

QR codes can play an important role for you, as they start a call directly from the side who needs support towards the right Support group or person.

You can stick a QR code to a machine for instance.

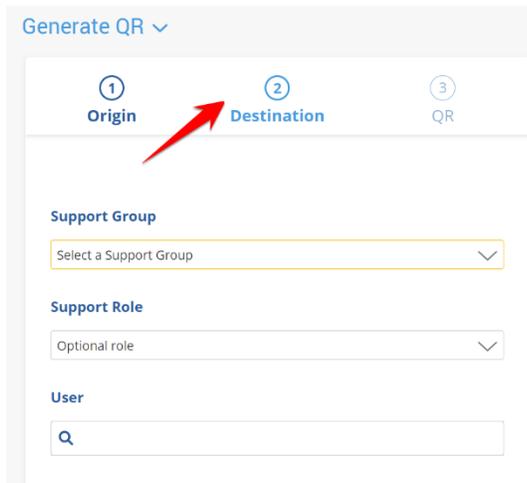
To create a QR code, select first who the caller

will be:



This feature is currently restricted to registered users, but future updates will expand functionality.

Once the caller is selected, click on “Destination” and fill the fields:



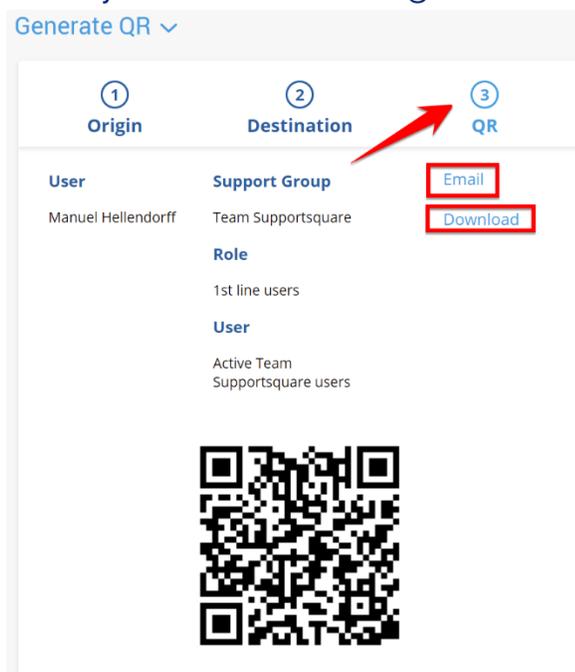
The screenshot shows the 'Generate QR' interface. At the top, there are three tabs: 'Origin' (1), 'Destination' (2), and 'QR' (3). A red arrow points to the 'Destination' tab. Below the tabs, there are three form fields: 'Support Group' with a dropdown menu showing 'Select a Support Group', 'Support Role' with a dropdown menu showing 'Optional role', and 'User' with a search input field containing 'Q'.

The only mandatory field is the Support group. In this case, the caller will call the whole support group until someone picks up the call.

You can further refine who will receive the call with “Support Role”: 1st line or 2nd line.

You can also simply attribute a single user within that Support group as destination

Finally, click on “QR” to generate the QR code:



The screenshot shows the 'Generate QR' interface with the 'QR' tab (3) selected. A red arrow points to the 'QR' tab. Below the tabs, there is a table with the following data:

User	Support Group
Manuel Hellendorff	Team Supportsquare

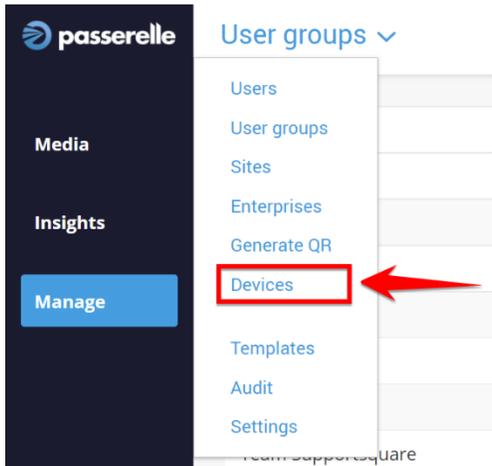
Below the table, there are two buttons: 'Email' and 'Download', both highlighted with red boxes. Underneath the table, there are three sections: 'Role' with '1st line users', 'User' with 'Active Team', and 'Supportsquare users'. At the bottom of the form, a QR code is displayed.

You can choose to share the QR Code directly via mail, or download it as a printable file.



The QR Code feature will expand functionality in the future. Stay tuned for more, or contact us if you have a specific request!

9. Manage Devices

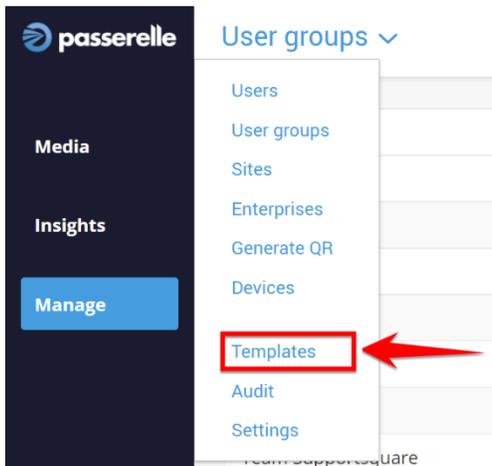


Click on "Devices"



That functionality isn't currently in use but will be in the future. Stay tuned for more!

10. Manage Templates

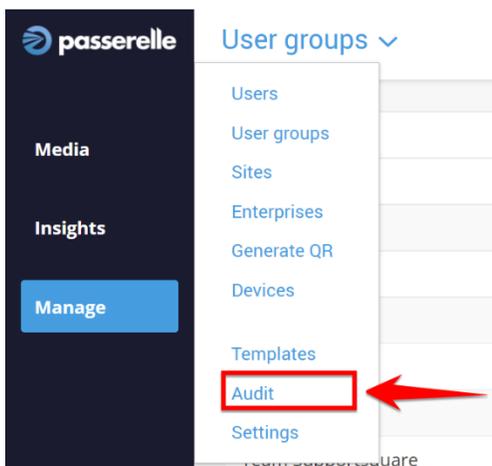


Click on "Templates"

Templates allow you to customize your invitation mail, invitation text message (SMS), your terms & conditions, Privacy Policy, GDPR text,...

For more info, check our "Customizing Templates" manual available on our [support page](#)

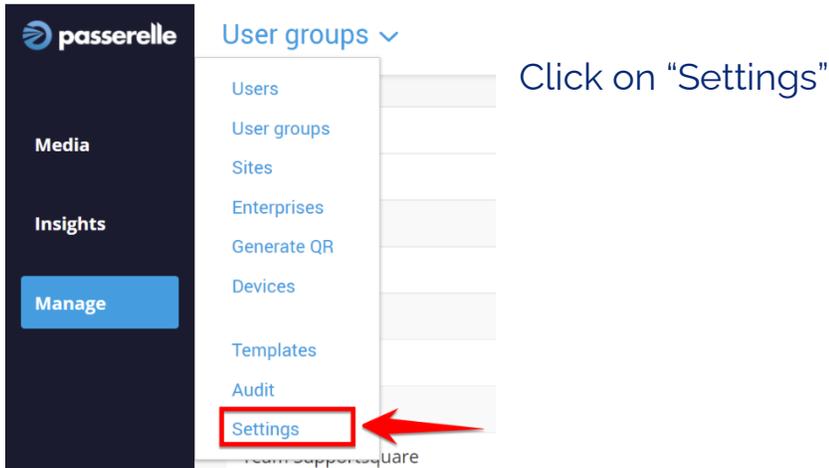
11. Manage Audit



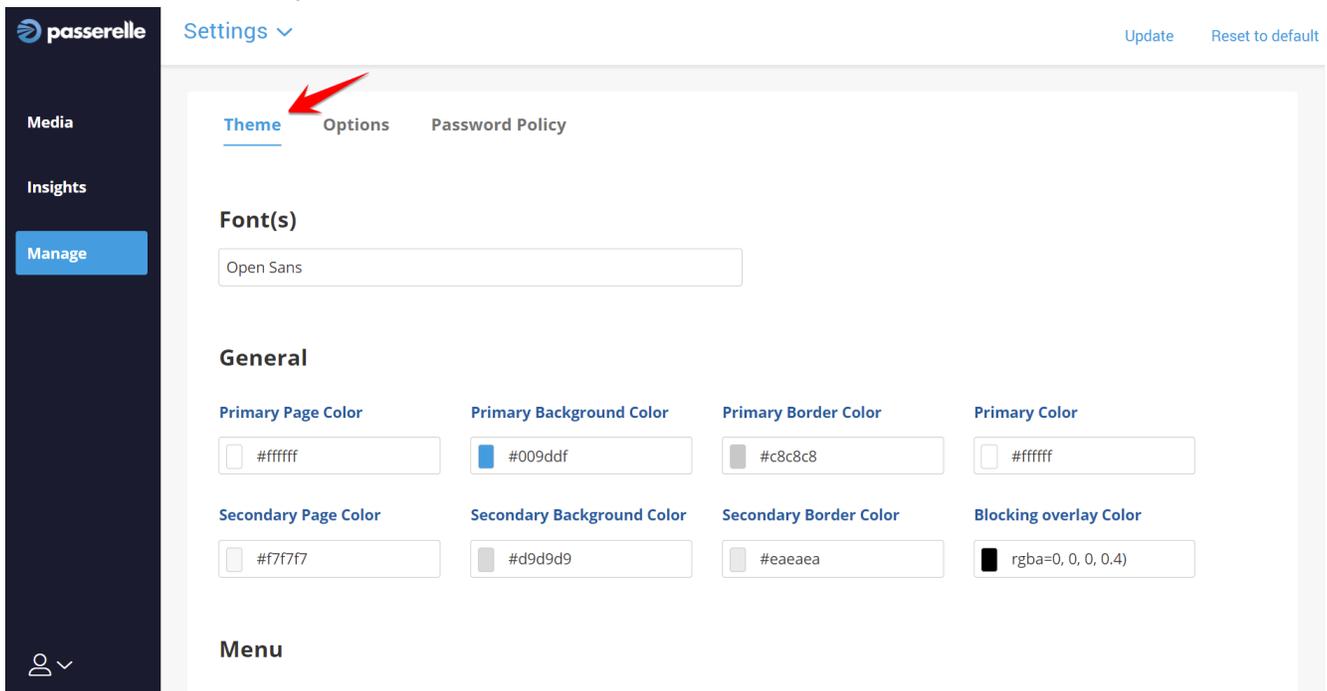
Click on "Audit"

Audit gives you an overview of the events on the Passerelle Coach platform.

12. Manage Theming & Branding



Make sure the top menu item "Theme" is selected



To adjust the colors and theme, click on any item to select the desired color. The 3 most visible/used colors are the menu colors:

Menu

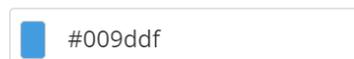
Menu Background Color



Menu Foreground Color



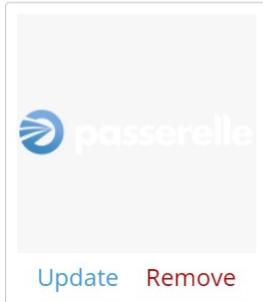
Menu Active Foreground Color



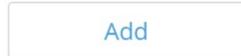
At the bottom of the list, you will find the image options:

Images

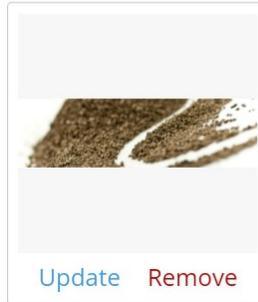
Logo



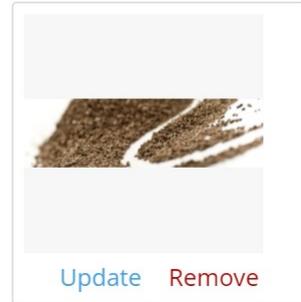
Logo Streaming



Background Image



Login Background Image



For best rendering, load a PNG version of your logo with transparency



Background Image & Login Background Image are capped at max 500kB, so make sure your images stay below that threshold.

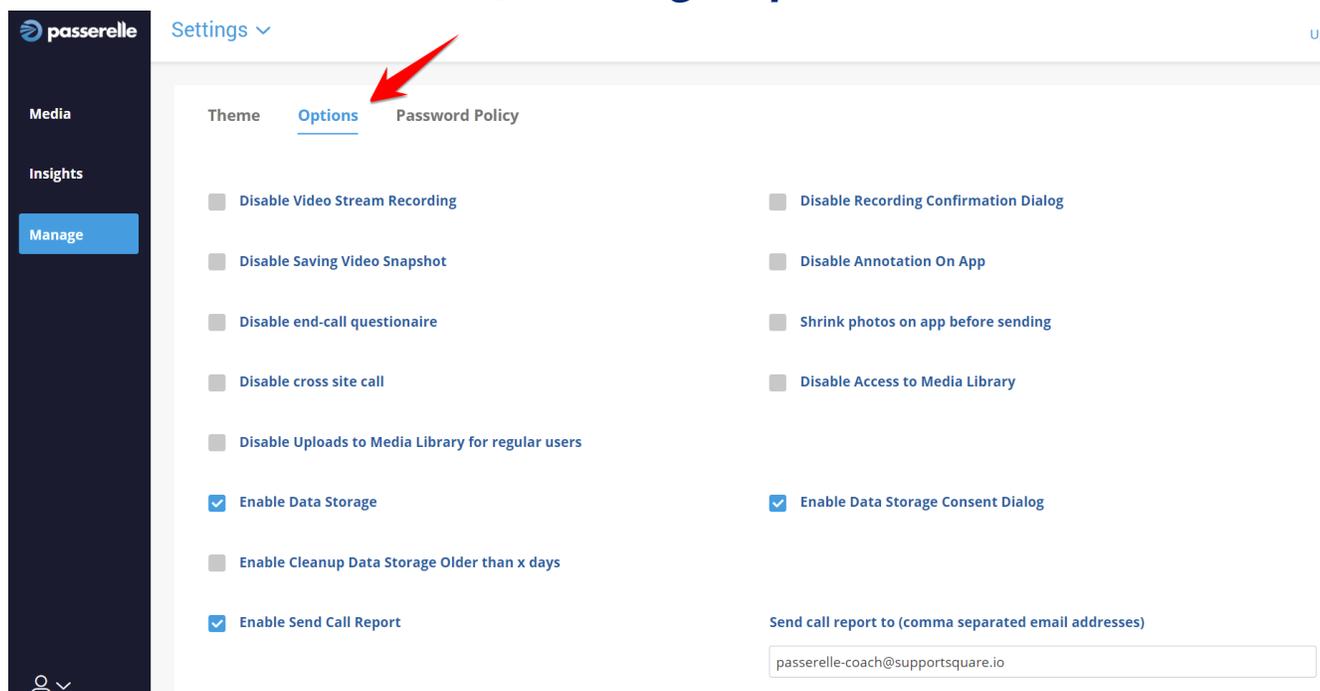
Don't forget to validate your changes by clicking on the "Update" button, otherwise your changes will be discarded!

Settings ▾



Reset to default

13. Manage Options



The screenshot shows the Passerelle Settings interface. The left sidebar contains 'Media', 'Insights', and 'Manage' (highlighted in blue). The main content area is titled 'Settings' and has three tabs: 'Theme', 'Options' (selected and underlined), and 'Password Policy'. A red arrow points to the 'Options' tab. The 'Options' tab contains the following settings:

- Disable Video Stream Recording
- Disable Saving Video Snapshot
- Disable end-call questionnaire
- Disable cross site call
- Disable Uploads to Media Library for regular users
- Enable Data Storage
- Enable Cleanup Data Storage Older than x days
- Enable Send Call Report
- Disable Recording Confirmation Dialog
- Disable Annotation On App
- Shrink photos on app before sending
- Disable Access to Media Library
- Enable Data Storage Consent Dialog

At the bottom, there is a text input field labeled 'Send call report to (comma separated email addresses)' with the value 'passerelle-coach@supportsquare.io'.

In “Settings”, click on “Options”

1. Disable Video Stream Recording

This will make the video recording during a call unavailable. The upside is that it will enhance the call quality overall.

2. Disable Recording Confirmation Dialog

When starting a call record, a notification is sent to the other party, and that party can choose to refuse call recording. This option disables that dialog box and starts records immediately when clicking on the record button.

3. Disable Saving Video Snapshot

It becomes impossible to save a video snapshot of the call

4. Disable Annotation On App

Annotation mode will not be accessible during a call

5. Disable end-call questionnaire

At the end of each call started with an invitation, there is a small (and customizable) questionnaire. "Default" asks the invitee for call satisfaction with rating from 1 to 5 stars.

6. Shrink photos on app before sending

This will further compress photos when sending them during a call

7. Disable Cross site call

It will not be possible to directly call users from different sites

8. Disable Access to Media Library

Regular Users won't be able to access and use the cloud media library

9. Disable Uploads to Media Library for regular users

Only admins will be able to manage uploads to the cloud media library, but users will still be able to use the files in the cloud media library

10. Enable Data Storage

All call data will be saved, including (if available) personal information: mail, phone number, name, chat, saved pictures & videos.

If you remove this, Personal data will be erased when closing the call. Only the registered participant name and call date & duration will remain available.

11. Enable Data Storage Consent Dialog

This gives the choice to an invited user to choose whether the personal information of the call will be available or not. If he refuses, the call can still start, and at the end of the call all personal information (invitee name, phone number, mail, chat message, photos, videos) will be wiped

12. Enable Cleanup Data Storage Older than x days

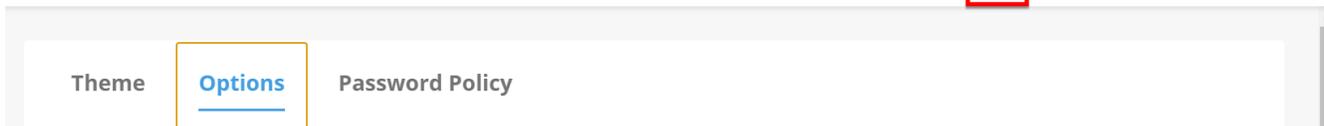
Setting this up let you choose how long personal data remains in the system. After a call is older than the set number of days, all personal data related to that call will be wiped.

13. Enable Send Call Report

Every call made will generate an automatic report that will be sent by mail to the set mail address(es). This is also configurable on a site level (all calls from that site), and on a user level (if a user wants to receive only his own call reports)

Again, don't forget to validate any change by clicking on "Update", otherwise your changes will be discarded!

Settings ▾



14. Manage Password Policy

Settings ▾

Update

Theme Options **Password Policy**

Min. Uppercase Characters:

Min. Length:

Min. Special Characters:

Days before a password expires:

Min. Digits:

Number of changes before a password can be reused:

Enable 2FA auth

In “Settings”, click on “Password Policy”

Again, don't forget to validate any change by clicking on “Update”, otherwise your changes will be discarded!

Settings ▾



Theme **Options** Password Policy