

# Admin Console





## Introduction

This support information serves as an introduction to the ProInteract™ Admin console for Workspace management.

*Please note that every module in the admin console is role and permission specific.*


## Indicators

The following indicators are used throughout this ProInteract™ Admin console support material:


Package Type Legend
 <b>Lite</b>
 <b>Regular</b>
 <b>Advanced</b>
 <b>Custom</b>

**Licence Package Information:** Availability of features corresponds to the product package that has been purchased by your organization. This manual describes all compatible features for each of the product packages.


*To the left is the legend shown throughout this manual for any feature not available to all packages.*




**TIP**  
Text with this icon informs you about useful tips while performing various operations.



**DO YOU KNOW?**  
Text with this gives you additional information about the current topic.



**CAUTION**  
Text with this icon cautions you about the consequence of an action which cannot be undone.



**IMPORTANT**  
Text with this icon informs you about important information of procedures to follow.

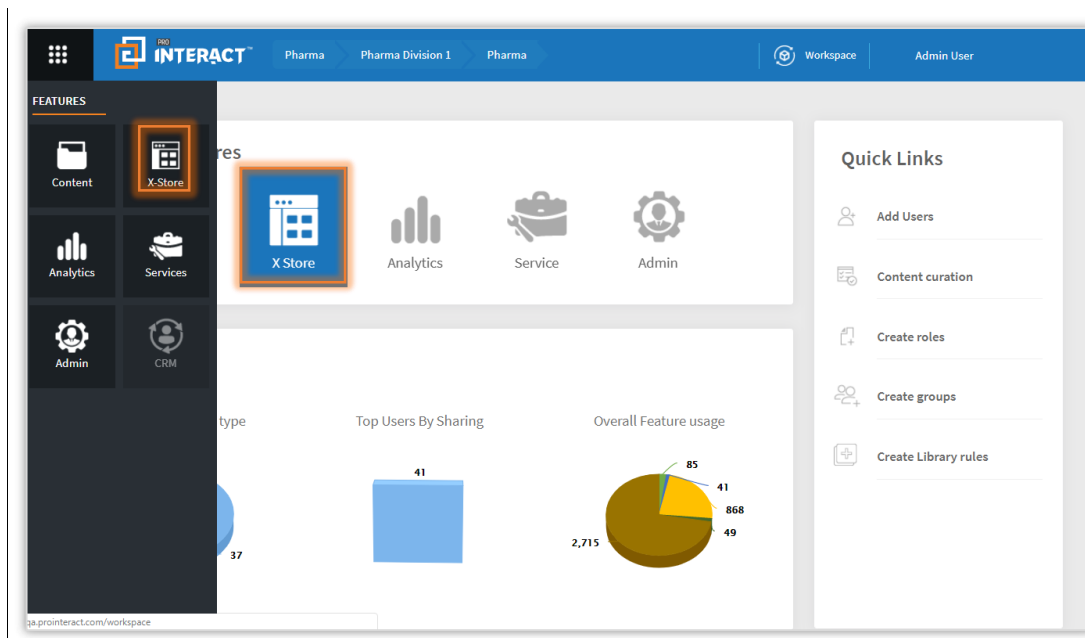
# Workspace

## What is a workspace?

Workspace has all resources that make up your experience like digital assets, marketing collaterals, forms, presentations etc. The user interface that is experienced by the end users on the mobile device or web is known as Workspace or Experience.

## How do I create a workspace?

1. Login to the ProInteract™ admin console with the registered credentials.
2. Click on the Magic Menu and Click on X Store.



3. In the X-Store screen, click on 'Add' button to generate a pop up. Proceed to enter all mandatory fields in each of the tabs.

**Create Experience** ✕

Fill Experience basic information

**Workspace** **Workspace Meta Data** Workflow Features

Name \*

Status \*

Workspace Type

Language

Use default template?

Template Version

Description

Visibility

Branding (Please upload zip file.)

Thumbnail (Max upload size is 1Mb, allowed type PNG, JPG, GIF, & SVG, size:152x152px) \*

## What is a Workspace Type, Template, and Metadata?



Workspace template or Content bundle is a file that is used for representation of static content on the mobile application.

Workspace Template is set to 'Yes' by default. Workspace Type, Workspace Template, and Workspace Meta Data are pre-configured and previously loaded to the database and its corresponding version.

Selecting 'No' from Default Template or select Template Version to view alternate workspaces.

## What is Branding?



Upload file(s) for advanced branding (zip format only) to establish Brand Identity and stand out against competition. *This field will be visible only to the 'Super admin' and not for any other user role.*

Click here to learn about Basic Branding options available: [Branding](#).

## How do I manage a Workspace?

In addition to editing and deleting a workspace, Admin can change the workspace type and status. Workspace management spans across 5 tabs which includes managing/updating Workspace, Meta data, Roles, Workflow and Features.

## How do I manage Workspace and Meta Data?



Unless otherwise requested, Workspace and Meta Data are pre-configured and previously loaded to the database and its corresponding version.

If using customized Workspace(s), changes can be managed as shown on the screen below.

The screenshot shows a web form titled "Update Experience" with a close button (X) in the top right corner. Below the title is the instruction "Fill basic Experience Information". The form has five tabs: "Workspace" (selected), "Workspace Meta Data", "Roles", "Workflow", and "Features".

The form fields are as follows:

- Name \***: Text input containing "Pharma".
- Status**: Dropdown menu with "Active" selected.
- Workspace Type**: Text input containing "Demo".
- Language**: Dropdown menu with "English" selected.
- Use default template?**: Radio buttons for "Yes" and "No".
- Workspace Template (Please upload zip file.)**: "Select file..." input with a "Browse ..." button.
- Description**: Text area.
- Visibility**: Dropdown menu with "Public" selected.
- Branding (Please upload zip file.)**: "Select file..." input with a "Browse ..." button.
- Thumbnail (Max upload size is 1Mb, allowed type PNG, JPG, GIF, & SVG, size:152x152px)**: Image preview showing a blue circular logo, with "1 file selected", "Remove", and "Browse ..." buttons below it.

An orange rectangular box highlights two checkboxes at the bottom of the form:

- Are these changes mandatory?**
- Send Push Notifications?**

**Are these changes mandatory?** If admin selects this checkbox, the updates are sent as mandatory updates information and are run automatically on the application without seeking user approval.

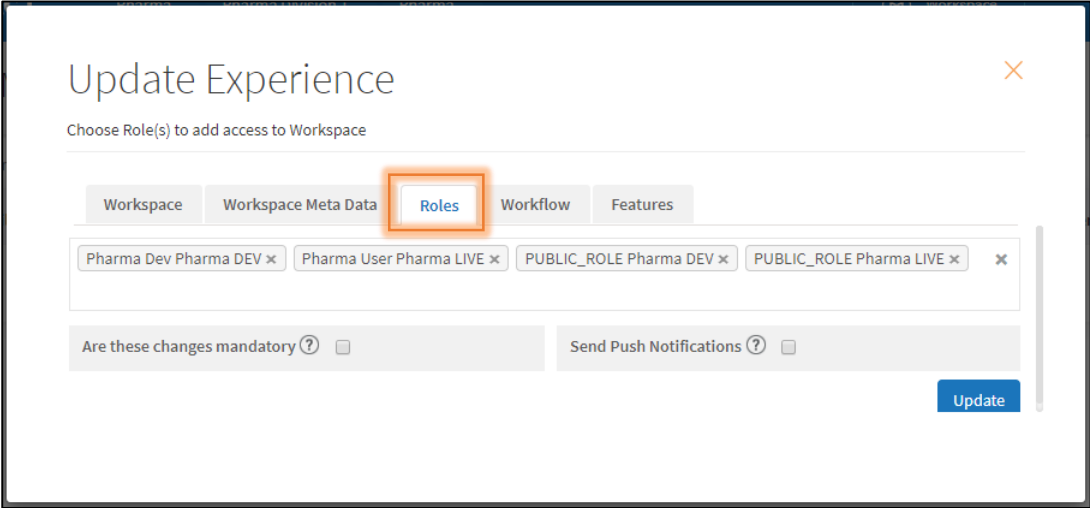
**Send Push notifications:** By choosing this, mobile app will get updates on content sync when User is logged in multiple devices.

## How do I assign roles to a Workspace?

Administrator can create and customize new roles in addition to using the existing roles created by default (see table below). Roles and groups must first be created by the administrator in order to be applied to the Workspace.

Default Role	Description
Role_ADMIN_WKS	Role Permissions allow users to access Admin Console and make unlimited changes to workspace content.
Public_ROLE	Role Permissions allow users to view content on Mobile Application per permissions set on given content.

Click on the text field which gives you different roles to choose from.

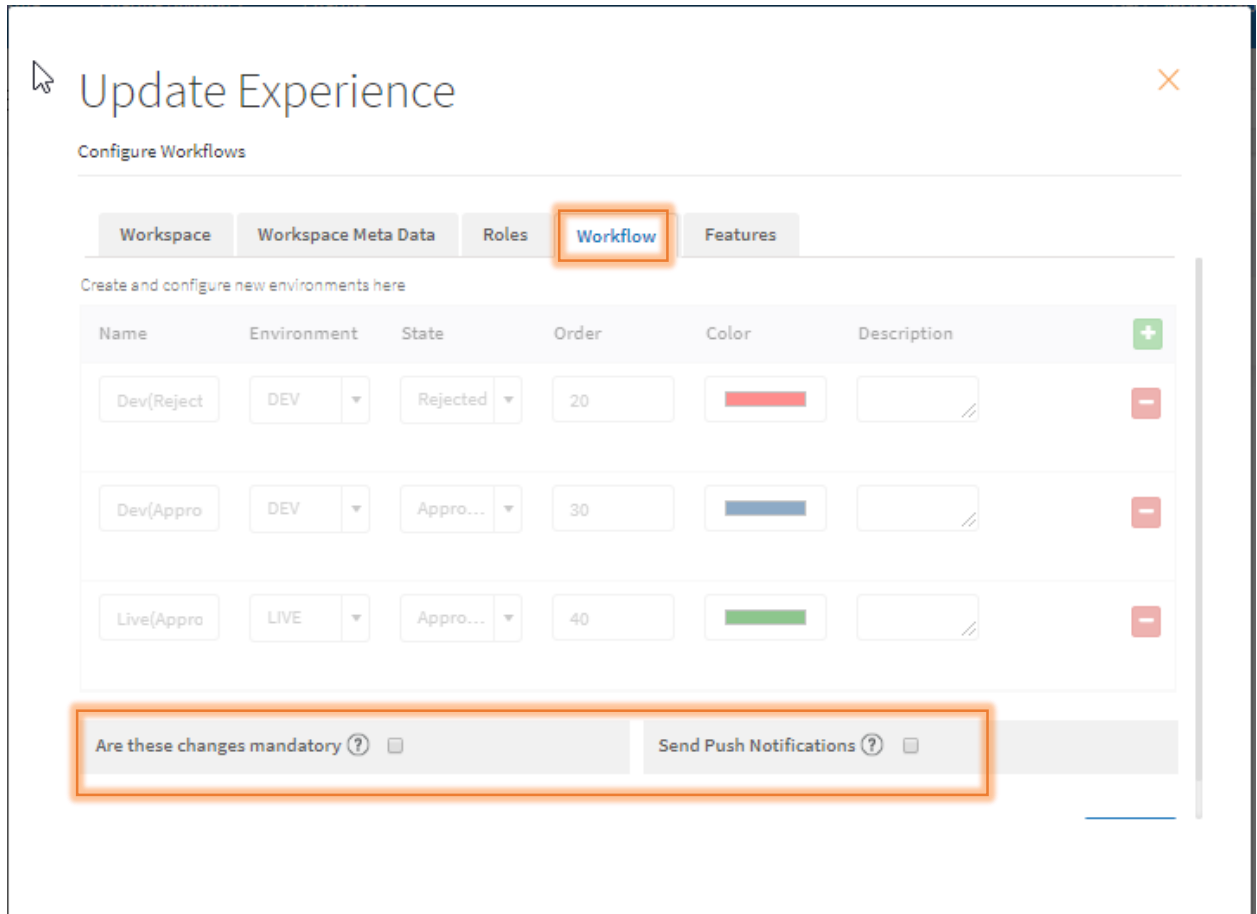


The screenshot shows a dialog box titled "Update Experience" with a close button (X) in the top right corner. Below the title, it says "Choose Role(s) to add access to Workspace". There are five tabs: "Workspace", "Workspace Meta Data", "Roles", "Workflow", and "Features". The "Roles" tab is selected and highlighted with an orange box. Below the tabs is a list of roles: "Pharma Dev Pharma DEV x", "Pharma User Pharma LIVE x", "PUBLIC\_ROLE Pharma DEV x", and "PUBLIC\_ROLE Pharma LIVE x". At the bottom, there are two checkboxes: "Are these changes mandatory?" and "Send Push Notifications?". An "Update" button is located at the bottom right.

To know more about Roles, please refer the help section [Security Management](#)

## What is Workflow in a Workspace?

After creating a workspace, Admin user can configure the workflow of the content in a workspace. Configuring a workflow plays a significant role when content is moved across different environments like Staging and Production.



The screenshot shows the 'Update Experience' configuration page, specifically the 'Configure Workflows' section. The 'Workflow' tab is selected and highlighted. Below the tabs, there is a table for configuring workflows. The table has columns for Name, Environment, State, Order, Color, and Description. Three workflow items are listed:

Name	Environment	State	Order	Color	Description
Dev(Reject)	DEV	Rejected	20	Red	
Dev(Appro)	DEV	Appro...	30	Blue	
Live(Appro)	LIVE	Appro...	40	Green	

Below the table, there are two checkboxes: 'Are these changes mandatory?' and 'Send Push Notifications?'.

For example, if the workflow is configured such that the order of LABS is 10 and LIVE is 20 and if Admin wants to reject a file from the LIVE environment, the content gets pushed to LABS. If any content is approved or rejected from an environment, the content is pushed to the appropriate environment based on the predefined order sequence in the workflow.

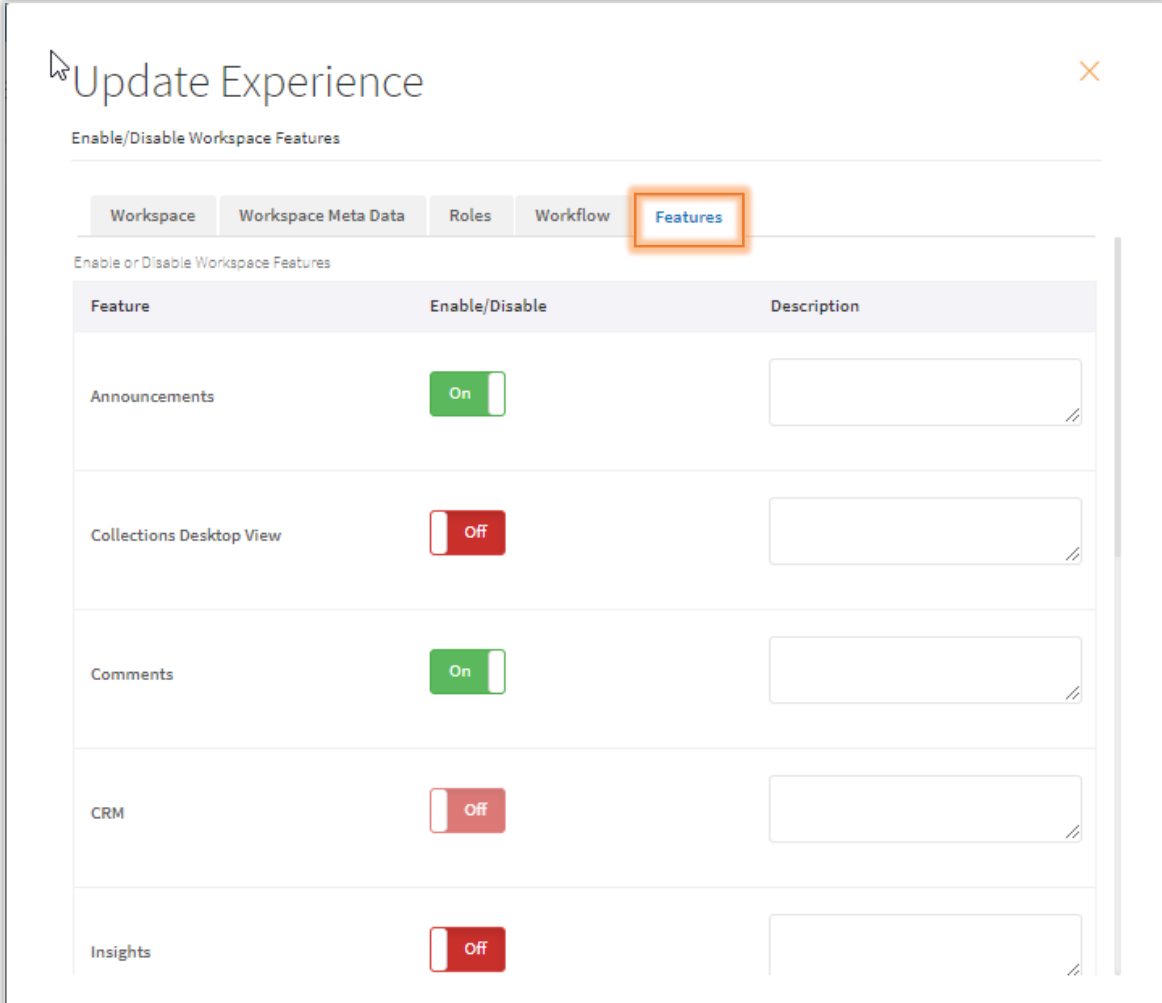
### IMPORTANT



Currently, workflow has been configured to have only ONE environment.

## How do I use Features ON/OFF?

Features can be Enabled/Disabled from the Features tab in Create/Update Experience.



Update Experience

Enable/Disable Workspace Features

Workspace Workspace Meta Data Roles Workflow **Features**

Enable or Disable Workspace Features

Feature	Enable/Disable	Description
Announcements	<input checked="" type="checkbox"/> On	
Collections Desktop View	<input type="checkbox"/> Off	
Comments	<input checked="" type="checkbox"/> On	
CRM	<input type="checkbox"/> Off	
Insights	<input type="checkbox"/> Off	



### DO YOU KNOW?

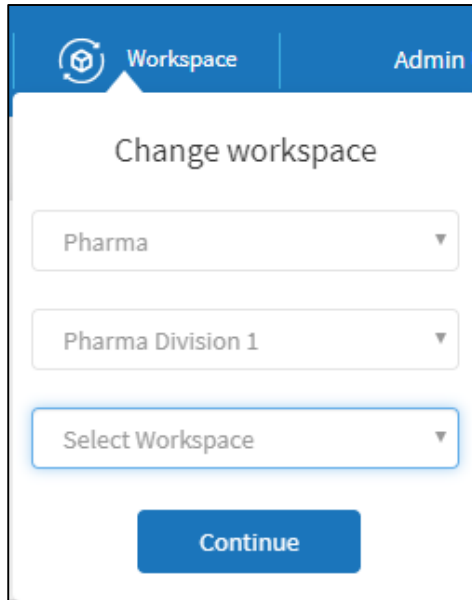
Turning off a mobile app feature results in the feature being invisible on the app.

However, turning off a feature on admin console only greys out the feature and will be disabled for use.



## How can I create and work with multiple workspaces?

Any number of workspaces can be created by the Admin. A user can switch between workspaces by clicking on the 'Workspace' button in the top navigation bar if he has permissions to access the desired workspace.



Change workspace

Pharma

Pharma Division 1

Select Workspace

Continue



### DO YOU KNOW?

Any user can switch between workspaces only if he has access to the desired workspace.