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
INTERACT Lite
INTERACT Regular
INTERACT Advanced
INTERACT Custom

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.

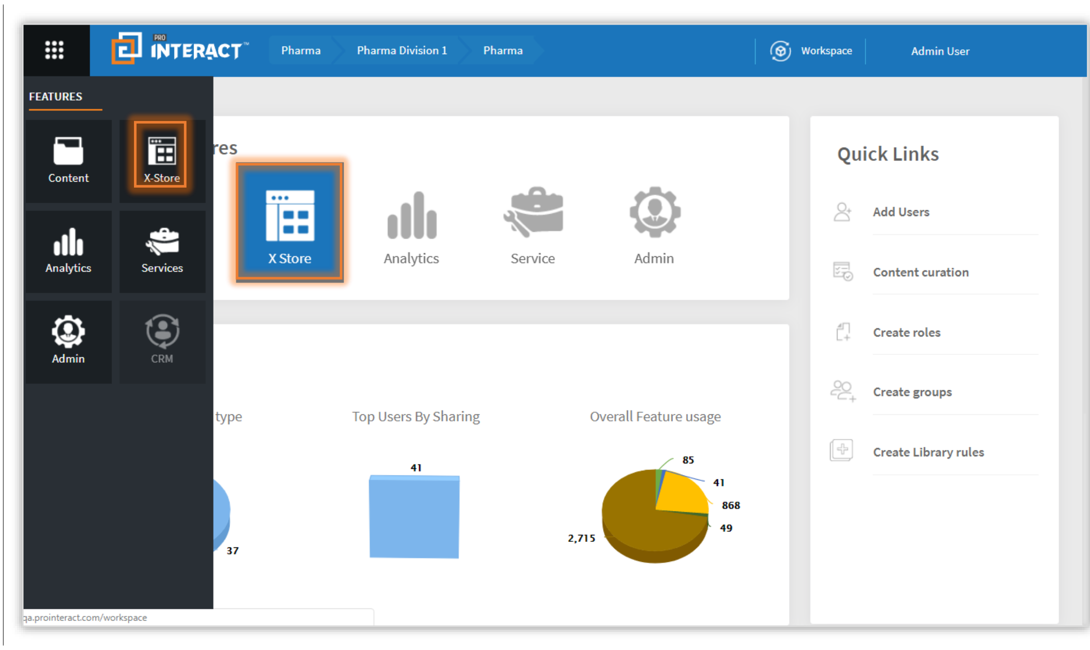
Workspace

What is a workspace?

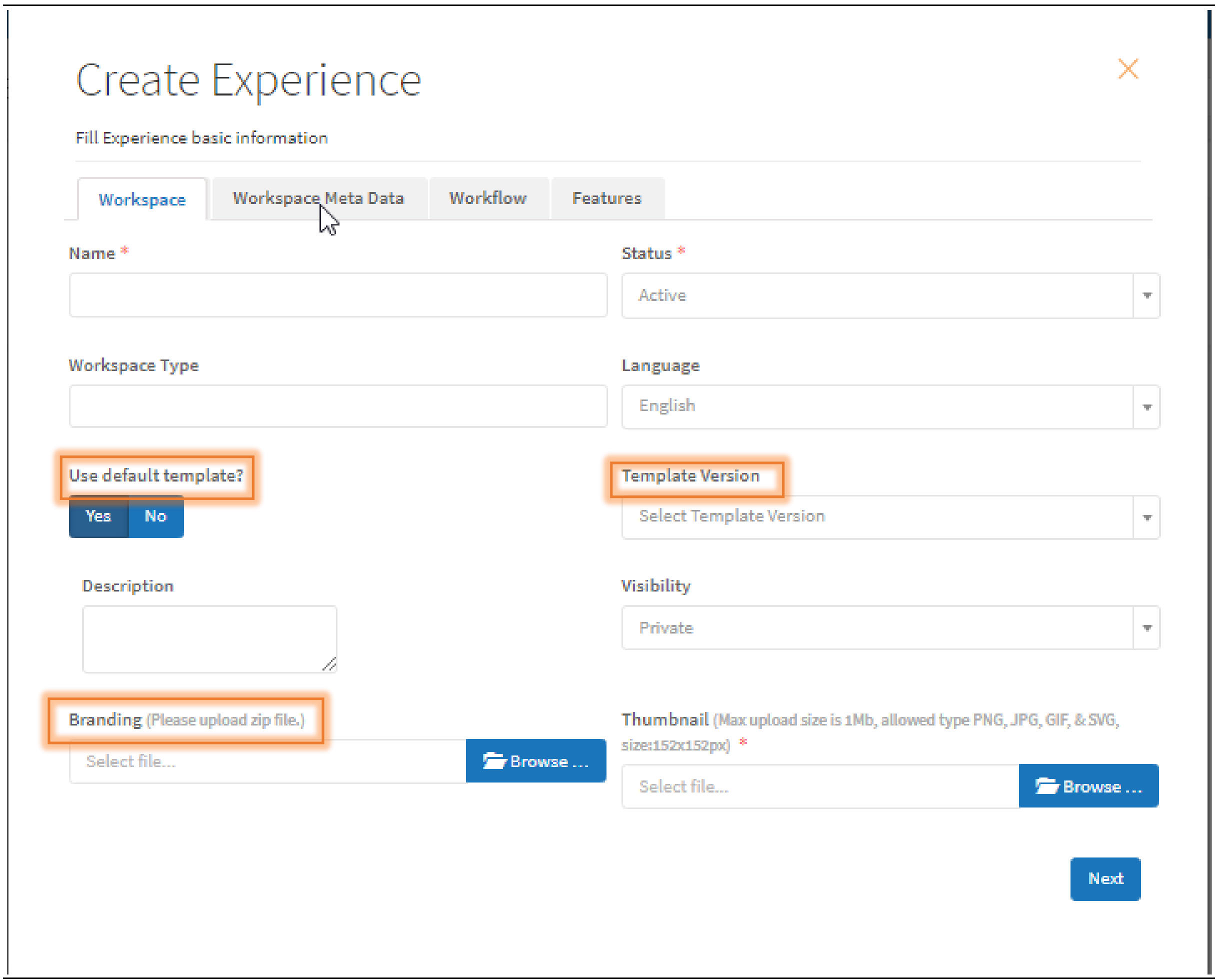
Workspace has all resources that make up your experience like digital assets, marketing collaterals, forms, presentations etc. The user interface that is experienced by the end users on the mobile device or web is known as Workspace or Experience.

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.



What is a Workspace Type, Template, and Metadata?

Packages: INTERACT Custom | INTERACT Advanced

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?

Packages: INTERACT Custom | INTERACT Advanced

Upload file(s) for advanced branding (zip format only) to establish Brand Identity and standout 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?

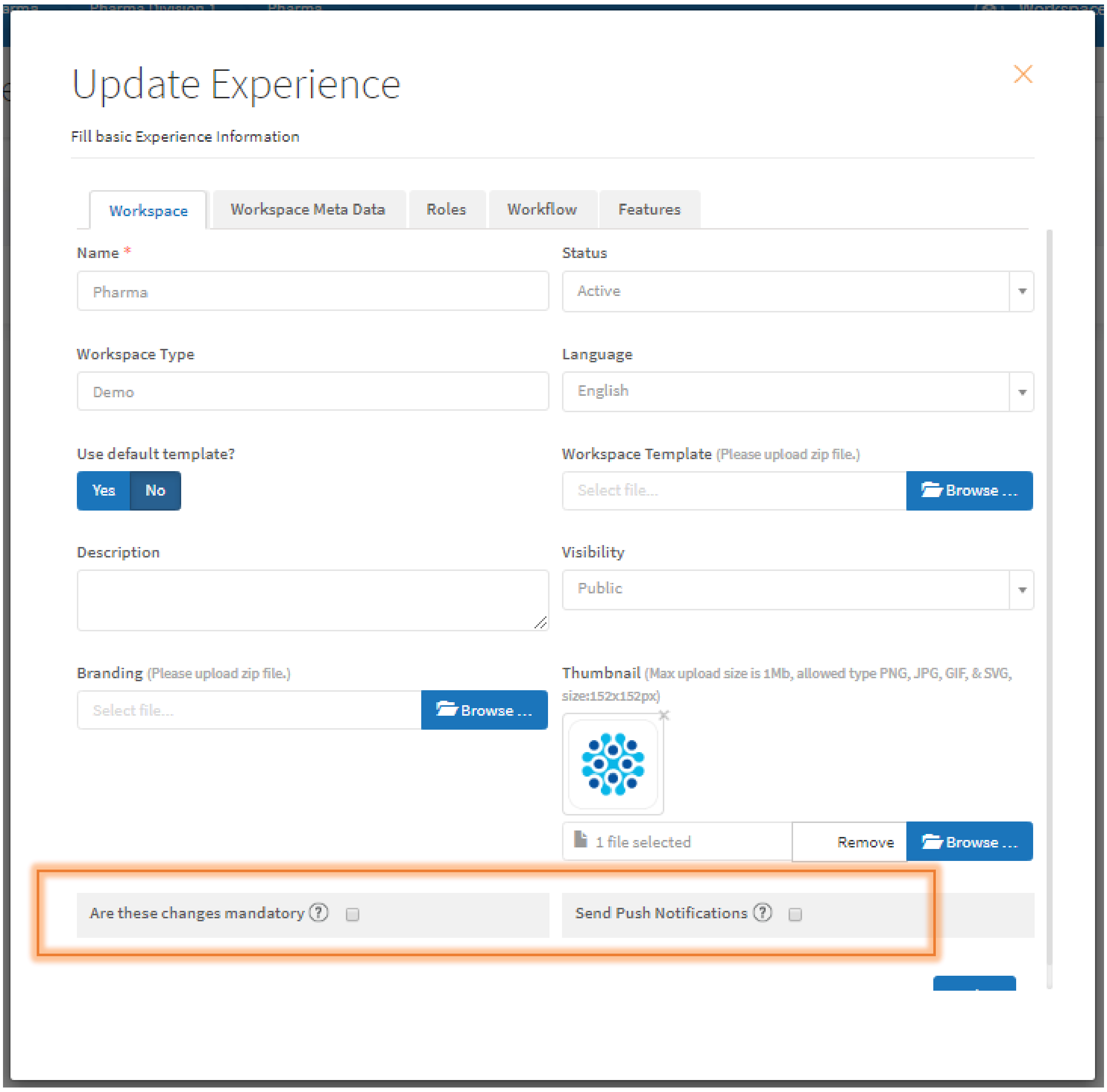
In addition to editing and deleting a workspace, Admin can change the workspace type and status. Workspace management spans across 5 tabs which includes managing/updating Workspace, Meta data, Roles, Workflow and Features.

How do I manage Workspace and Meta Data?

Packages: INTERACT Custom | INTERACT Advanced

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.



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.

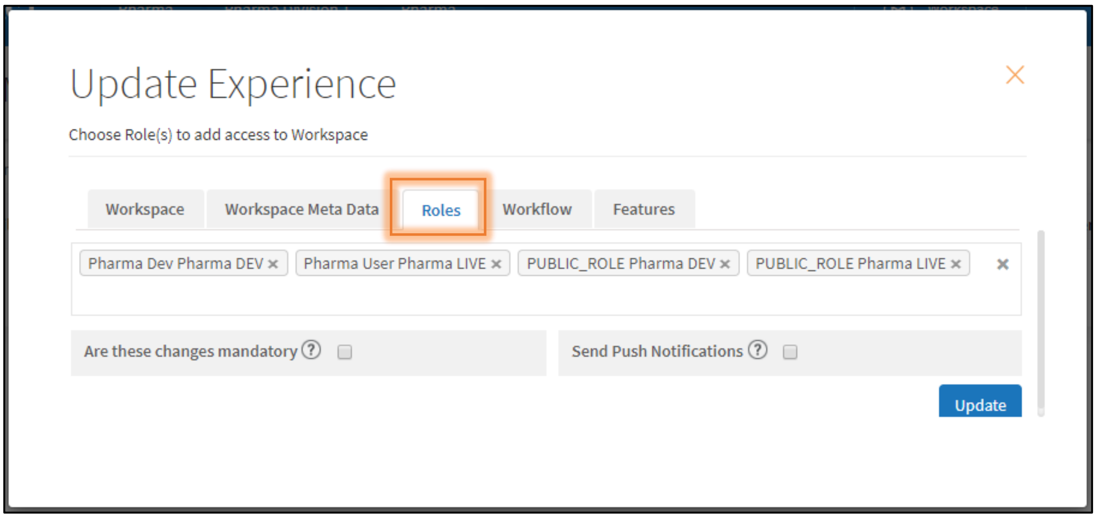
Send Push notifications: By choosing this, mobile app will get updates on content sync when User is logged in multiple devices.

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.

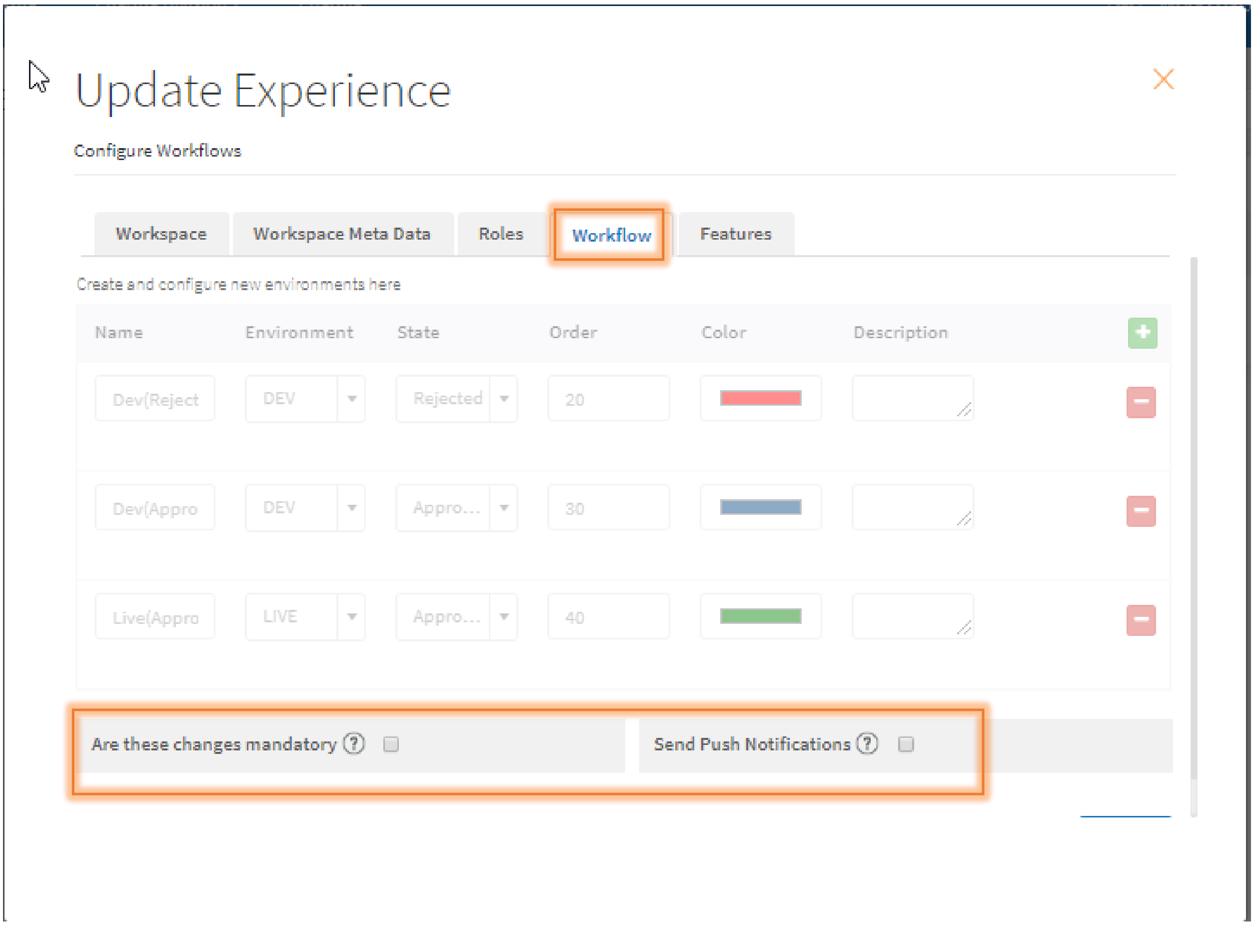
Click on the text field which gives you different roles to choose from.



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.



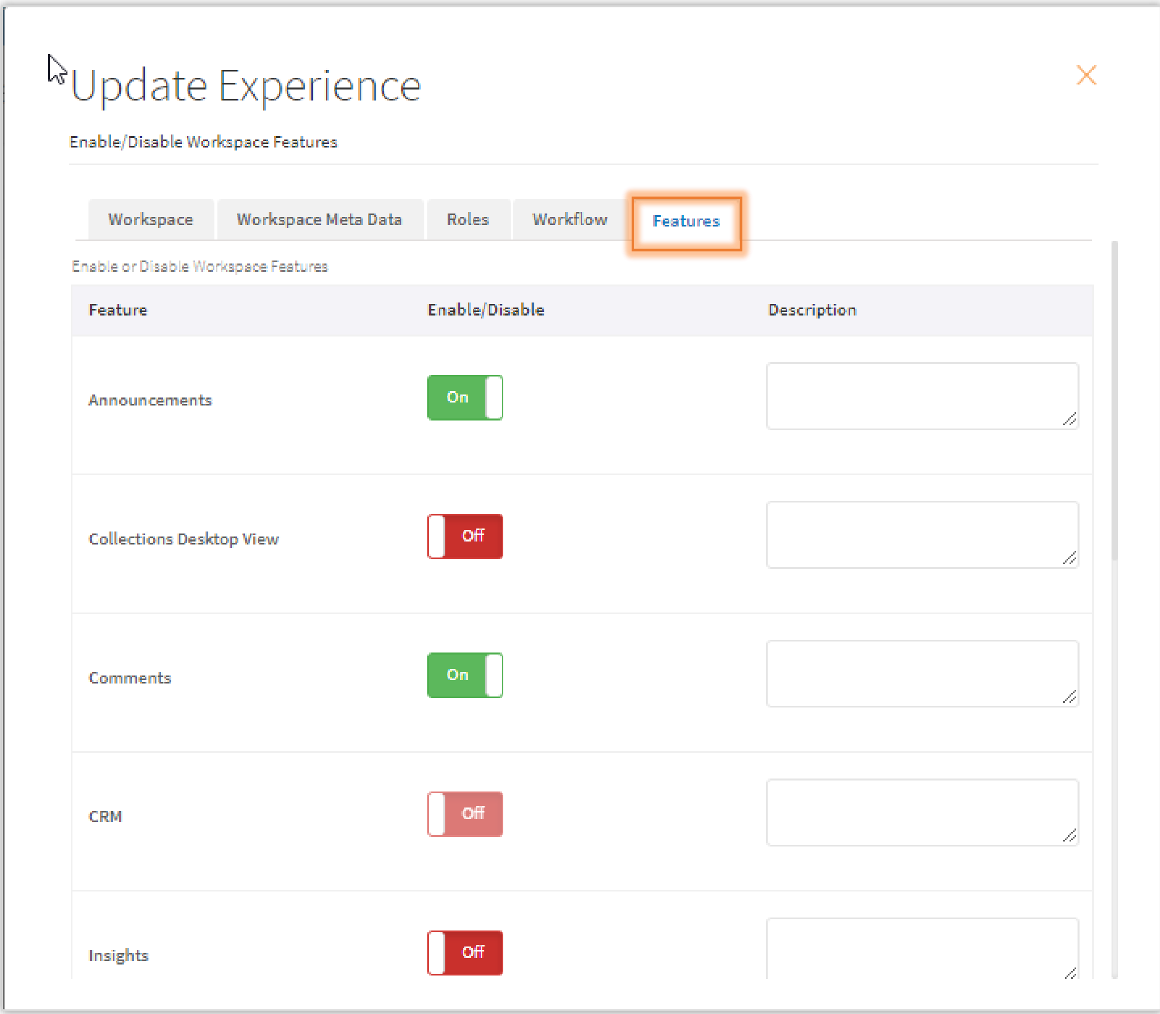
For example, if the workflow is configured such that the order of LABS is 10 and LIVE is 20 and if Admin wants to reject a file from the LIVE environment, the content gets pushed to LABS. If any content is approved or rejected from an environment, the content is pushed to the appropriate environment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

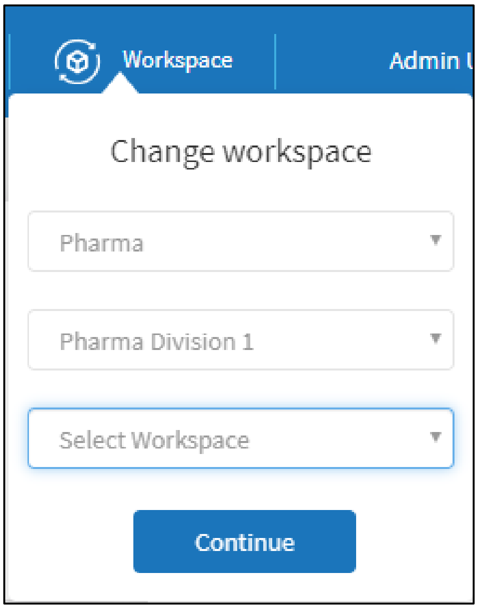
Features can be Enabled/Disabled from the Features tab in Create/Update Experience.



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.



DO YOU KNOW?

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