Admin Console

Introduction

This support information serves as an introduction to the ProInteract™ Admin console for Important Information on Content 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**

License 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.

Important Info

Default Library types appear in groupings within the tree structure of the left panel shown below. A Library is a repository of all the digital files and folders on the ProInteract platform.
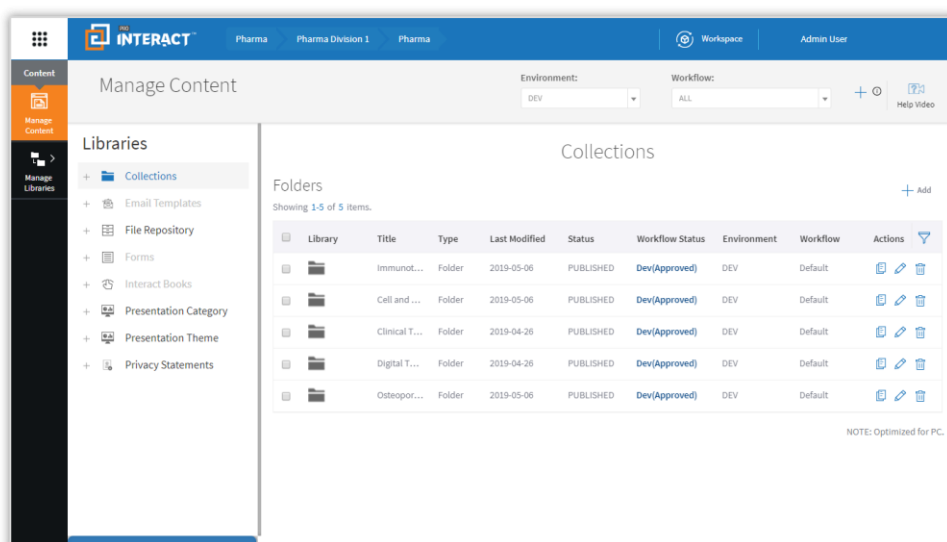
What are Default Library types and Default Content types?

Content types permitted and mapped to each Library grouping are also set by default. **Below is the tabular representation of the default content types for each of the libraries.**

Library Type	Default File Type (extension)
Collections	PDF (pdf)
	Video (MP4, M4V, MOV, M3U8)
	Images (JPG, JPEG, PNG)
	HTML (ZIP format only)
	MS PowerPoint (ppt, pptx)
	MS Excel (xls, xlsx)
	MS Word (DOC, DOCX)
Presentations	HTML (ZIP format only)
Presentation Theme	HTML (ZIP format only)
Product Plus	
Gallery	Images (JPG, JPEG, PNG)

• **360 degree view**	HTML (ZIP format only)
Message	HTML (ZIP format only) or WYSIWYG
Videos	Video (MP4, M4V, MOV, M3U8)
Documents	PDF (pdf)
	Video (MP4, M4V, MOV, M3U8)
	HTML (ZIP format only)
	MS PowerPoint (ppt, pptx)
	MS Excel (xls, xlsx)
	MS Word (DOC, DOCX)
File Repository	PDF (pdf)
	Video (mp4)
	HTML (ZIP format only)
	MS PowerPoint (ppt, pptx)
	MS Excel (xlsx, xls)
	MS Word (DOC, DOCX)
Privacy Statements	HTML (ZIP format only) or WYSIWYG
Email Templates	WYSIWYG

IMPORTANT

Library Types and Content Types must be created and configured for content to be uploaded. Contact support@proInteract.com if seeking customizations beyond default types listed in table above.

How to upload Content?

Based on the pre-configuration of Library Rules, content can be created under the Parent Library or under any of the newly created Library types.

To know more information on the Library types, Content types and Library rules, please refer to the help section Content management: Library Management

How do I create a Folder?

Important: The below instructions are a guide for creating Folders across ALL the Library groups.

Library types like Folders, Forms or Email Templates that are associated with a Library can be created in the following way.

- Select a Library from the Tree structure.
- On the right-hand panel of the screen, click on 'Add' in the Folders table.
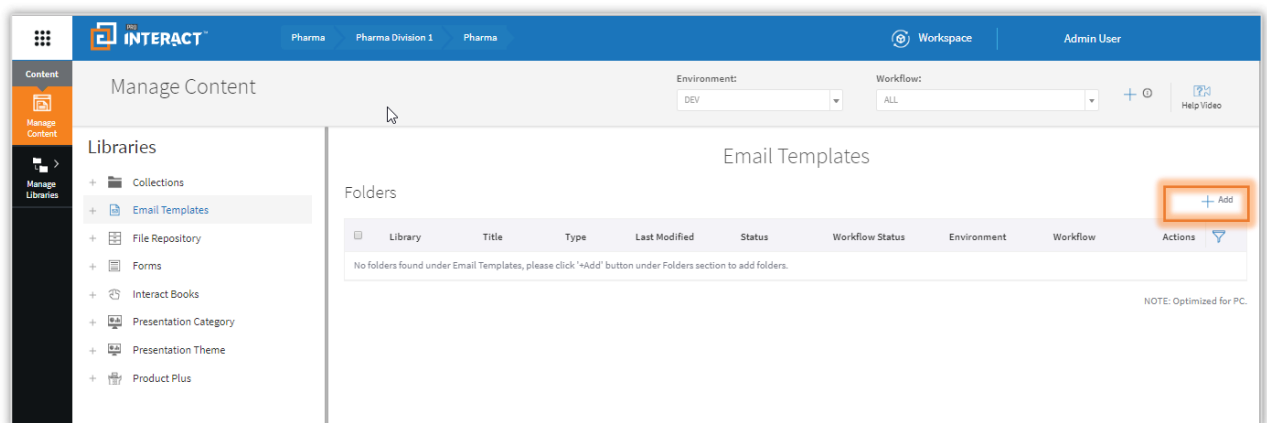
- Continue to the next tab to fill meta data and assign roles.
- Click on Submit and see the newly created folder on the right-hand panel of the screen.

How do I create Assets (Files)?

> **IMPORTANT**
> Instructions in this section serve as a guide for managing all folders and files across all Library groupings.

Content types like Files, Competitive Info or Clinical message that are associated with a Library can be created in the following way.

- Click on 'Add' button under the File table.
- In the modal window, select the desired File type. Ex: File, Clinical message etc.

Offline: Choosing a file to be offline means that on the mobile application, the Rep can choose to download this file to their device, hence this file will be available for view even when Rep is not connected to the internet.

File Type: Choose the desired content type to be uploaded.

Workflow: Choose a pre-defined 'workflow' for content to be migrated across different environments

Share Alias: Choose an alternate link or file to be shared with the Rep instead of the actual file.

Link can be any URL whereas a File can be chosen from the dropdown which will have a list of all existing files on the application.

Shareable: Set value to 'Yes' to allow a file to be shareable from the mobile application.

Security level: Set security level as Restricted, Internal or External for the file to be filtered on the mobile application

IMPORTANT

Only those content types which are mapped to the selected Library can be viewed for selection under the dropdown 'File Type'.

Enter all mandatory fields and then proceed to File Meta Data tab.

Meta data is a custom field which can be configured while creating a content type.

Create File - In 'Clinical Trials'   ✕

Choose to Role(s) to add access to File

| File | File Meta Data | **Role** |

Pharma User Pharma LIVE ✕ | ✕

Submit

How do I manage a Library Folder?

- Click on the magic menu and go to Content.

- Click on Manage Content and select a library.

- Admin user can perform actions like edit, delete or view version of a library.

CAUTION

Once a Library is deleted, all content within that Library will be lost. This action can't be undone.

How do I manage Folders and Files (Assets) within a Library?

Admin can add, edit, publish/reject, move/copy and delete folders and files. Admin can also approve/reject content from one environment to the other, can publish or un-publish a library and some or all the content within it, can move and copy Folders and Files within different levels of a given Library's hierarchy and across different Library types (dependent on Libraries sharing same Library Rules that allow same content types within each of them).

How do I move Folders or Assets (Files)?

A user can move multiple folders and files across different collections by using the 'Move to' button. Select a folder(s)/file(s) from within a collection that needs to be moved.

User is shown a tree structure with ability to select the destination where he wants the folder(s)/file(s) to be moved. User selects the desired location and the folder(s)/file(s) are moved to the destination.

To know more information on the Library types, Content types and Library rules, please refer to the help section Content management: Library Management
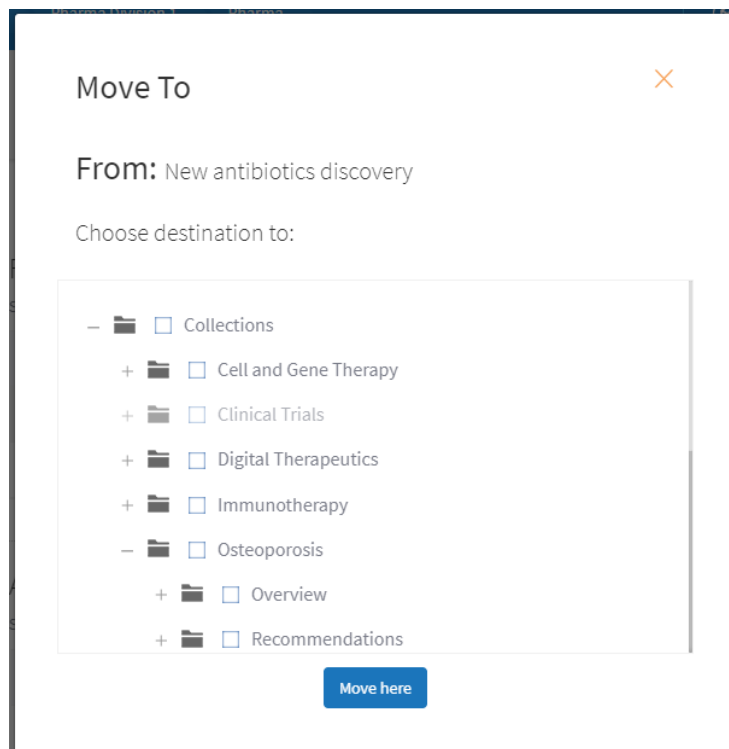
How do I copy Folders or Assets (Files)?

DO YOU KNOW?
A single file/folder can be copied to multiple Libraries, but multiple files/folders cannot be copied to multiple Libraries.

Files can be copied to various folders across collections using the 'Copy to' functionality.

Select a folder(s)/file(s) from within a collection that needs to be copied.

User is shown a tree structure with ability to select the destination where he wants the folder(s)/file(s) to be copied. User selects the desired location and the folder(s)/file(s) are copied to the destination.

IMPORTANT
Move/Copy of Folders/Files is only permitted if content within Folders/Files matches Content Rules for both Source and Destination Libraries
Destination's hierarchy must be built prior to moving/copying file from Source

What is 'Create Shortcut' in the Copy to functionality?

While copying a file to a single or multiple destination, User has the option to create a short cut for the file. This is helpful if you require the same file in multiple Libraries.

A copied content can be identified with the help of a visual indicator in the destination where the file is copied to. When a shortcut is created for a file, an icon appears under the 'Asset Type' column in the table where the source file is located. (*Please refer to the red highlight in the below image*).

To create a shortcut, a single file/multiple files must be selected from the library or from any of the library types within the library before clicking the button 'Copy To'. A checkbox then appears below the tree structure which says, 'Create shortcut'. Upon selecting the check box 'Create files as shortcut', the user is allowed to copy the file/s as shortcut.

Copy To

Choose destination to:

- ☐ Collections
  - ☐ Cell and Gene Therapy
  - ☐ Clinical Trials
  - ☑ **Digital Therapeutics**
  - ☐ Immunotherapy
  - ☐ Osteoporosis
- ☐ Email Templates
- ☐ File Repository

☐ Create files as shortcut ⑦

Copy here
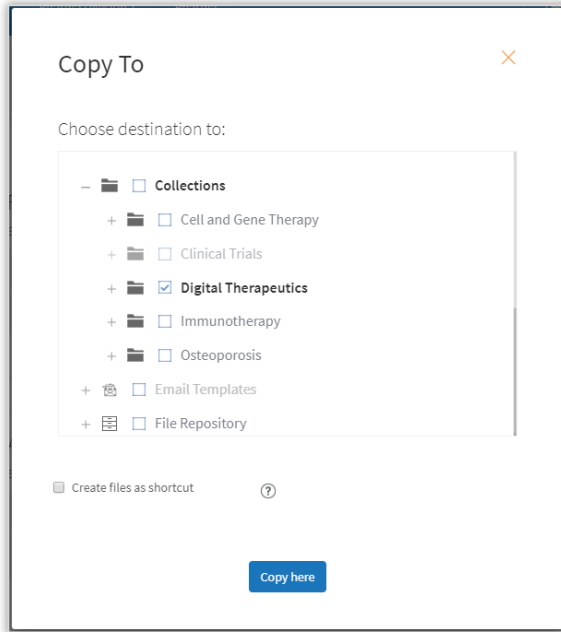
IMPORTANT

A File which is a 'Shortcut' is not editable but will automatically be updated if its original version is modified. Therefore, the cloned 'Shortcut' copy can only be deleted, while the original file is retained.

Appendix A: Move/Copy Rules

- Single Folder/File can be copied to multiple Folders in single operation
- Multiple Folders/Files can only be copied to one Folder
- Single Folder/File can be moved to multiple Folders in a single operation
- Multiple Folders/Files can only be moved to one Folder
- While coping a Folder/File, the newly copied record will be in unpublished state by default.
- While moving a Folder/File, there will be no change of state for this record.
- Move/Copy of Folder/File does not work for First level nodes/Parent nodes like Collections, Email Templates etc.
- Move/Copy of Folder/ File cannot be done to same parent i.e. Source and Destination for the moved/copied files cannot be the same.
- Move/Copy of Folder cannot be done to itself (Same folder will be in greyed off)
- While copying Files they can be opted to be created as a shortcut, whereas for copying a Folder, no shortcut option exists.
- Copying a file is treated as hard copy and shortcut is treated as soft copy
- Shortcut cannot be editable but can be deleted. Upon deleting a file which is a shortcut, the original record will continue to exist.
- Move/Copy of Folders/Files is only permitted if content within Folders/Files matches Content Rules for both Source and Destination Libraries
- Destination's hierarchy must be built prior to moving/copying file from Source
- For Product Plus: Files can be only copied/moved to the lowest folder of Product Plus hierarchy.
- On deleting original File, all the shortcuts will also be deleted
- A file which is a shortcut, will have an indicator icon

Disclaimer:

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