

Portals Introduction

Portals are a feature available in PromoMats and Vault Medical which allow you to highlight specific content in a custom UI. This functionality allows you to make it easier for users to find content/ provide additional context to the information being highlighted.

This document provides information for Portals with the New Portal user interface. For information on the legacy Portal, see [here](#).

The screenshot displays the Natevba Portal interface. At the top, there is a green header with the Natevba logo, a search bar labeled "Search Portal Library", and icons for shopping, notifications, and user profile. Below the header is a carousel titled "Natevba e-Detail Aid - Carousel" featuring a 3D rendering of the Natevba product box and a list of bullet points: "Natevba™ is an innovative new treatment targeting X-antigen" and "Natevba™ is indicated for the first-line treatment of X-antigen positive (XA+) non-Hodgkin's lymphoma".

Below the carousel are "Content Filters" with buttons for "Logos and Brand Imagery", "Press Releases", "Advertisements", "Photos", "Videos", "Web Content", and "Promotional Material". To the right is an "About Natevba" section stating: "Natevba™ is the **only first line** treatment for X-antigen positive (XA+) Non-Hodgkins Lymphoma (NHL). You can find more information information on the treatment [here](#)."

The "Announcements" section includes two entries: "New Materials Coming Soon!" by Jane Doe (2/8/2023 10:30 AM EST) and "Natevba receives Approval!" by Amy Admin (1/26/2023 5:00 AM EST). The latter announcement includes the text: "Natevba has received Approval! Let's get our message to market and help improve the lives of XA+ NHL Patients everywhere!".

Below the announcements are "Featured Items" with tabs for "Featured Items", "Coming Soon", "Most Active", "Most Viewed", "Most Popular", and "Recently Added". A note states: "This section displays the **top content** for Natevba carefully curated by your Portal Manager." Below this is a "Created Date" dropdown menu and a grid of featured items, including a slide titled "Natevba" and a line graph showing survival probability over time with a callout for "45% overall survival rate at 12 months".

Enabling Portals

For information on enabling Portals, refer to [Enabling the Portal Editor](#).

About the Portal Homepage

The Portal homepage is built from different widgets. These widgets serve different purposes in allowing users to find and manage their content.

- **Carousel:** The Carousel can be used to display your Portal's most important content as a click-through banner at the top of the Portal Homepage.



- **Content Filters:** Content Filters are saved search views from the Portal library. Content Filters can be used to provide filtered views for users accessing the Portal content


Content Filters




- **Announcements:** Announcements can be used to share information and updates with all users specific to a Portal. The four most recent announcements will be shown on the Portal Homepage.

Announcements

[View All](#)

 Jane Doe
2/8/2023 10:30 AM EST

New Materials Coming Soon!
New Natevba Materials will be approved and in PromoMats soon!

 Amy Admin
1/26/2023 5:00 AM EST

Natevba receives Approval!
Natevba has received Approval! Let's get our message to market and help improve the lives of XA+ NHL Patients everywhere!

- **About Section:** In the About section, Portal administrators can provide a quick description of the Portal and its content. Rich text is supported.

About Natevba

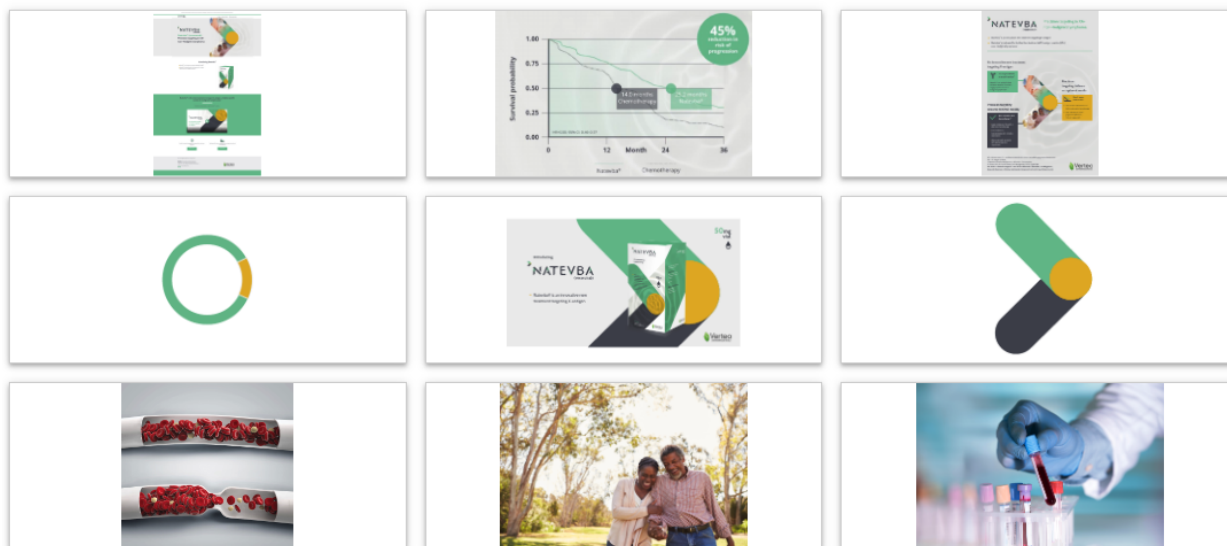
Natevba™ is the **only first line** treatment for X-antigen positive (XA+) **Non-Hodgkins Lymphoma (NHL)**. You can find more information information on the treatment [here](#).

- **Document Widgets (Custom):** Document widgets allow Portal administrators to curate a fully customized group of documents. Portals can have up to 5 custom document widgets with 60 documents each.

[Featured Items](#) [Coming Soon](#) [Most Active](#) [Most Viewed](#) [Most Popular](#) [Recently Added](#)

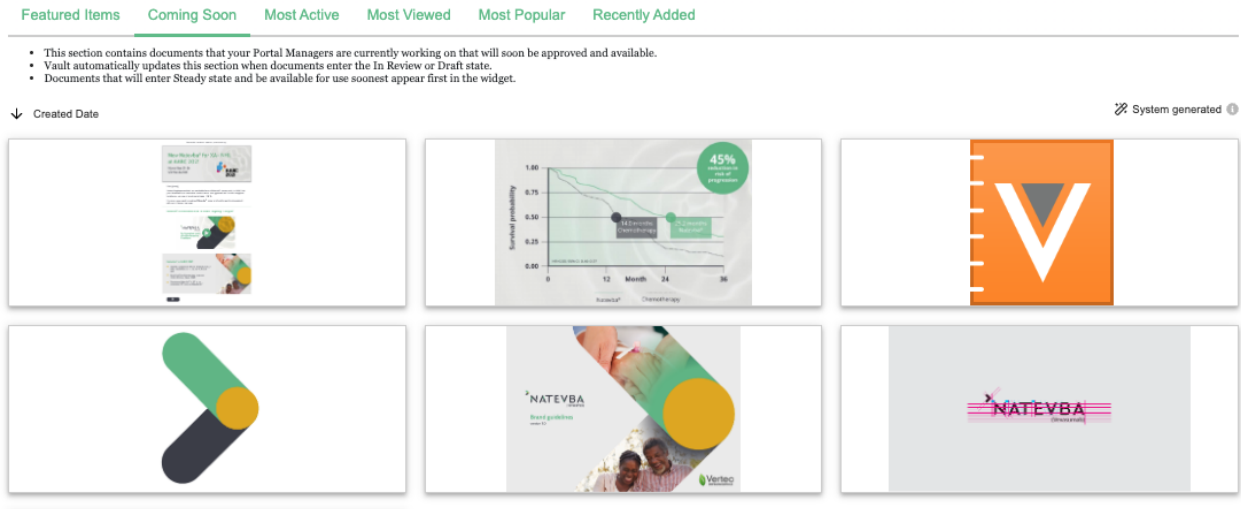
This section displays the **top content** for **Natevba** carefully curated by your Portal Manager.

↓ Created Date

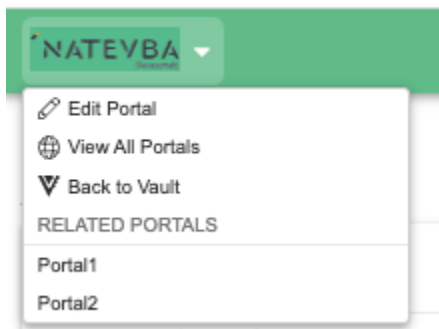


- **Document Widgets (System Generated):** These Document widgets are system generated based on the nature of the content added to your Portals.
 - **Most Popular**
 - **Recently Added**
 - **Most Viewed**
 - **Coming Soon**
 - **Most Active**

For details on the logic used to populate the System Generated widgets, see [here](#)



- **Related Portals:** This area will list any Portal that has been associated with the current Portal. If Portals are associated, when a user is searching the Portal library, the search will be across the Portal the user is currently viewing and all associated Portals.



Portal Limits:

The following table outlines the limits for Portal widgets

Widget	Legacy Portals	New Portals
Carousel	4 documents	8 documents
Content filters	12	12
System-generated document widgets	24 documents *	60 documents *
Custom document widgets	12 documents *	60 documents *

* Admins can edit the *Display Max* field to limit the number of documents shown to users.

Using the Portals

Content Filters

When you click on a content filter, you will be redirected to the Portal Library with a filter applied. This view of the library will display content that fits the criteria defined in the Content Filter.

Document Thumbnails

When you hover over content in your Portal Homepage or Portal Library, Vault displays key information and options for quickly interacting with your document:

- **View Full Details:** Click the View Full Details button () to see the full document or binder in the document viewer.
- **Add to Cart:** Click the Add to Cart button () to add the document to your cart.
- **Download:** Click the Download button () to download the document's source file. Note that you can only download documents from the Quick Look viewer. To download Binders, click View Full Details or add them to your Cart.

- **Make a copy:** Click the Make a copy button () to make a copy of the document for your reuse needs. Using this option will allow you to copy content and fields, while defining a “based on” relationship to the original document

Portal Access

Users must have sufficient permissions to interact with Portals and Portal content. [This article](#) outlines the required permissions for users to have access to Portals.

Portal only Users

There is a mechanism available to limit access to PromoMats or Vault Medical to only the Portals and relevant content. Users with access to multiple Portals land on the Portal Selector page at login. Click a Portal’s name to navigate to that Portal. Once in a Portal, you can access the Portal Selector through the drop-down menu next to the Portal logo. If you navigate to other pages within the portal, you can also click the Portal Logo to navigate back to the Portal Homepage.