

Sample Feature Requirements

Feature	Description
Asset Management	
Asset Organization	Explicitly show documents that are in-review. Ability to create multiple libraries for approved content.
Supported File Types	PDF, DOCX, XLSX, PPTX, and Videos. Unlimited storage space.
Custom Tagging	Create custom tags to easily sort and filter through approved documents.
Search Functionality	Filter and search by asset name, tags, dates, library, brand, description, etc. (customizable).
Metadata Information	Display supporting details to identify and give context to the document uploaded. (E.g. library, job number, description, tags, etc.)
Version Control	Clearly view the lifecycle of edits made to a document. Prevent older versions from being downloaded and distributed.
Integrations	
API Level Capabilities	Integrate with CRM systems and other SaaS applications for internal and external use.
Single Sign-On (SSO)	Sign in using your corporate usernames and password.
Workflow Management	
Libraries	Create libraries for different internal departments. Create external-facing libraries for outsourced agencies to upload and view content.
User and Permissions	Add/remove users easily (including KOLs and other external short-term users). Customize library permissions based on authority and roles. Set users as “observers” when approval is not needed, but they need line of

	sight on the project.
Comments and References	Leave comments on text and images. Link medical claims to reference documents for compliance. Manage comments by resolving and filtering to streamline reviews. View all changes in real-time.
References Library	Have all reference documents organized in one central place and be accessible to any documents under review. Set expiration dates for references as well.
Attachments	Include any supporting file type to the main document (i.e. copy decks, regulatory approvals, source files, etc.).
Notifications & Expiration Dates	Set expiration dates with automated email reminders to your team - notification frequency customizable based on individual preferences.
Mentions	Direct questions/comments to specific users in comments to improve response times and efficiency.
Approval Structure	Send out content for approval to everyone at once or in sequential stages. Password required to submit approval to stay Part 11 compliant.
Other	
Analytics	Activity logs available to download. View all activity done on the platform, statistics on time to approval, etc.
Cloud Provider	Reliable and well-known for security purposes. (e.g. Amazon Web Services)
Account Management and Technical Support	Have a Customer Success Representative available in a Live Chat to resolve issues as they come up. Listen to feedback and implement changes to the platform to improve workflow.