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How to Configure Workflows

Version 1.0, For HALOPV 5.0

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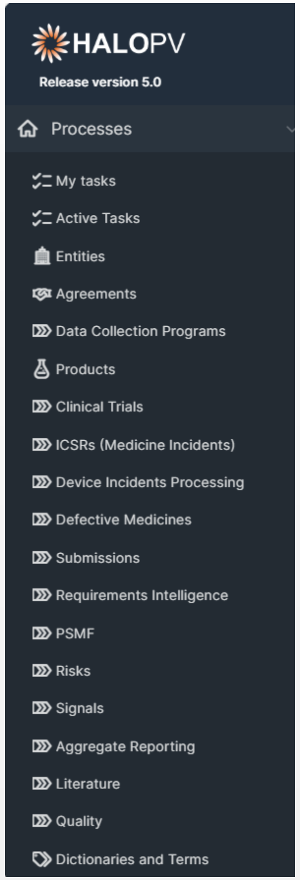
About HALOPV Workflows



- HALOPV is a highly configurable platform and it enables to setup and configure the flow information into any desired processes called Workflows.
- HALOPV Workflow's can be configured to enable setup of various PV Modules such as –
  - Studies
  - Project
  - Sites
  - Products
  - ICSR
  - Aggregate Reporting
  - Submission
  - Signals
  - And Others
- Different workflow stages can be configured to be accessible by different User Groups which enables multistage Review and Approval of information.
- HALOPV also enables to Automate a workflow stage, thus enhancing compliance and speed.

Note – All the workflows and their stages represented here are configurable for their names, stages and lot more, so they may vary in different environments.

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Content

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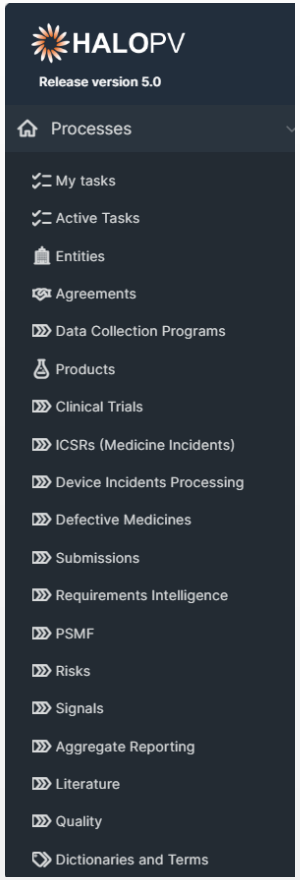
Prerequisite

Configuring a Workflow



Pre-requisites to be able to configure a Workflow are –

- User must have access to Application Management, i.e. Application Admin role.

Automated Workflows

- Automatic Workflow gets triggered as per configured condition defined in the application.
    - It is advised to reach to HALOPV Support to configure an automatic Workflow

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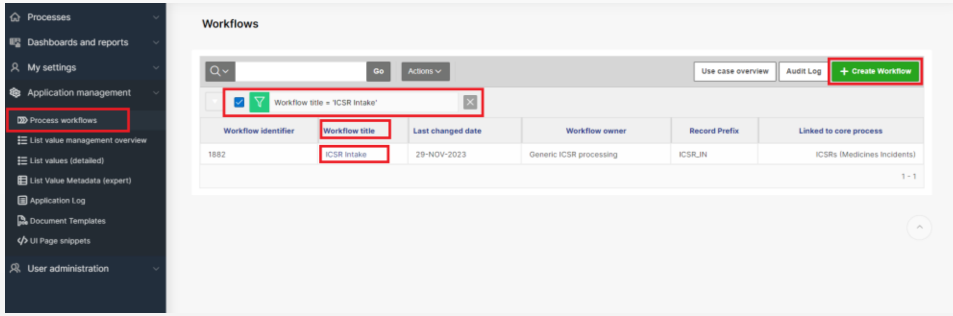
Getting to Workflows



- On the navigation menu (left-hand side of the screen Deep Sea Blue), under “Application Management” parent menu there will be a submenus -
  - Process Workflows – this menu is used to configure workflows in the application.
  - List value (Detailed) – this menu is used to configure most of the list values at HALOPV Including navigation menu.
- Click on “Process Workflows” –
  - Look for the workflow you want to update using available search options in the grid and click on “Workflow title” link.
  - Or create a new workflow using CREATE WORKFLOW button.
  - Or Copy an existing workflow by opening a workflow using “Workflow title” link and use the button COPY WORKFLOW.
    - This is the fastest way to create a new workflow similar to an existing workflow.

Configuring a workflow is a two-step process –

- Configuring Workflow
- Configuring Workflow Tasks

Note – We are creating a new workflow in this example, the options at other workflow will remain more of same.

Note – *Configuring an application is specialised job, updating a configuration may result in change in application behaviour.*

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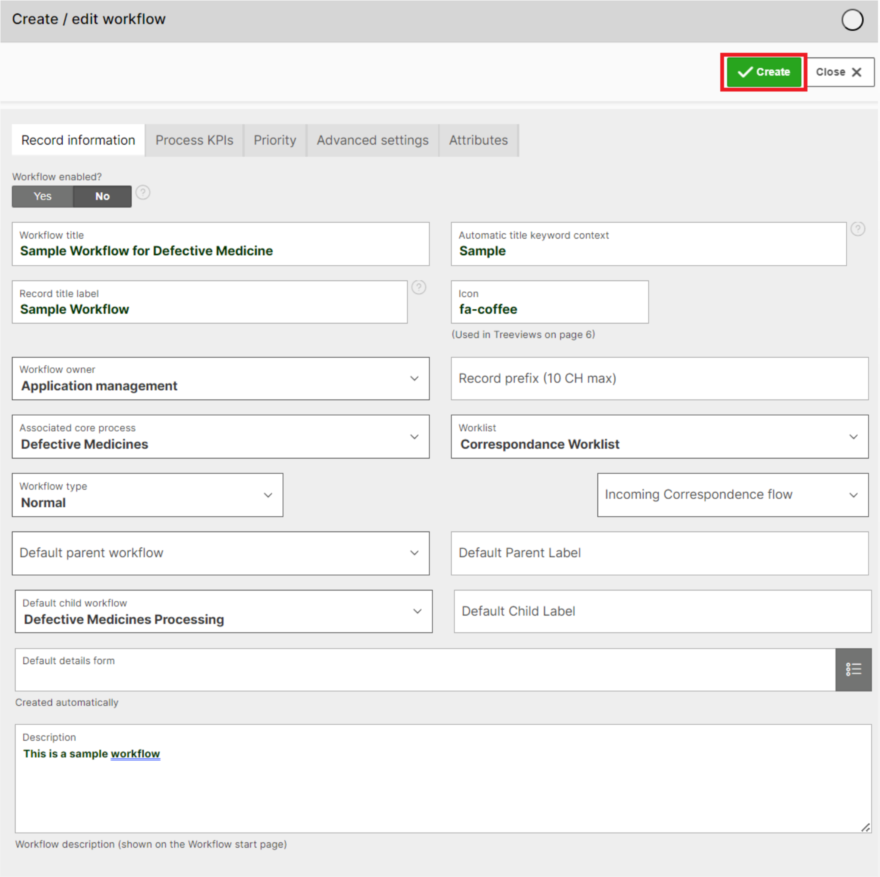
Creating WF
- Record Information



A new workflow can be created, or an existing workflow can be updated using the “Create/ edit workflow” popup.
Complete the details in the popup to configure a workflow -

- Critical Fields on Record Information tab are –
  - Workflow enabled? – Used to enable or disable a workflow.
  - Workflow title
  - Record title label
  - Icon – Used to be displayed alongside workflow title, HALOPV supports Oracle Apex Icons.
  - Workflow Owner – The role required to access the workflow.
    - Please contact HALOPV support to create a new role (if required).
  - Record Prefix – Prefix used in the unique ID’s for workflow records.
  - Associated Core Process – The parent menu of the workflow.
  - Worklist
  - Workflow Type – Type of workflow Normal or Correspondance, correspondance WF is used for emailing-focused processing with incoming and/or outbound messages
  - Default Parent Workflow – The workflow selected here will appear as default when clicking the Parent record button or selecting parent action.
  - Default Child Workflow – The workflow selected here will appear as default when clicking the Child record button.
  - Description

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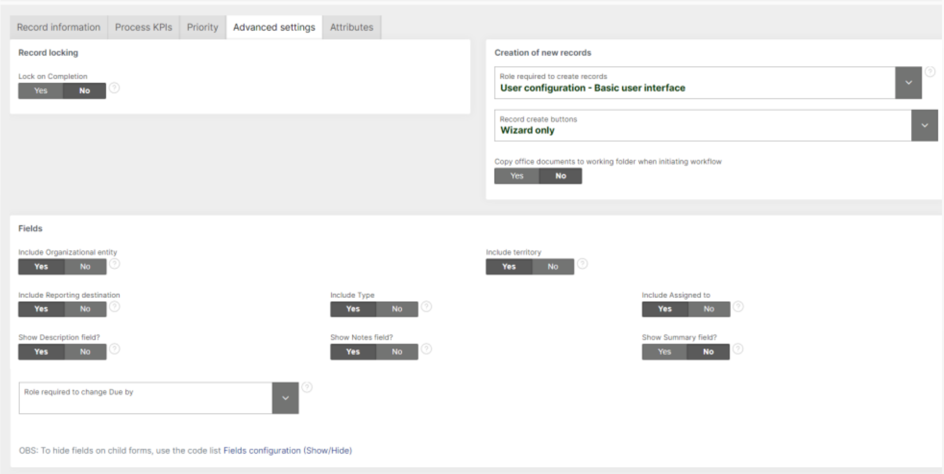
Creating WF
- Advanced Settings I



Complete the details in the "Create/ edit workflow" popup to configure a workflow -

- Critical Fields on Advance Settings tab are –
  - Record locking - Lock on Completion – You can choose to lock a record on its WF completion.
  - Creation of new records
    - Role required to create records
    - Record create buttons
    - Copy office documents to working folder when initiating workflow
  - Fields
    - Include Organizational entity
    - Include territory
    - Include Reporting destination
    - Include Type
    - Include Assigned to
    - Show Description field?
    - Show Notes field?
    - Show Summary field?
    - Role required to change Due by

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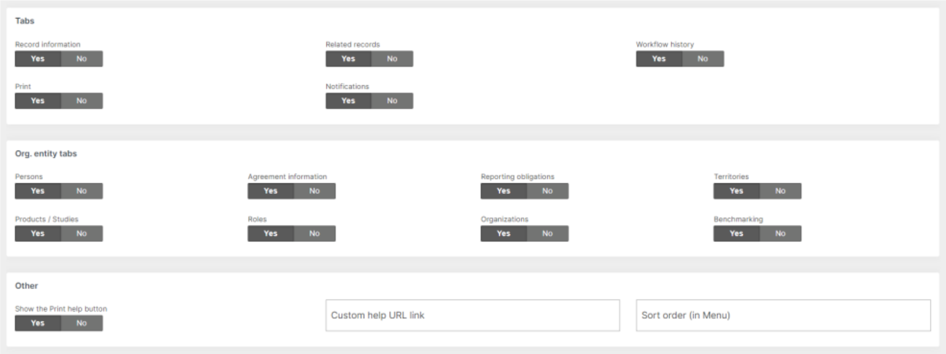
Creating WF
- Advanced Settings II



Complete the details in the "Create/ edit workflow" popup to configure a workflow -

- Critical Fields on Advance Settings tab are –
    - Tabs
        - Record information
        - Related records
        - Workflow history
        - Print
        - Notifications
    - Org. entity tabs
        - Persons
        - Agreement information
        - Reporting obligations
        - Territories
        - Products / Studies
        - Roles
        - Organizations
        - Benchmarking
    - Other
        - Show the Print help button
        - Custom help URL link
        - Sort order (in Menu)

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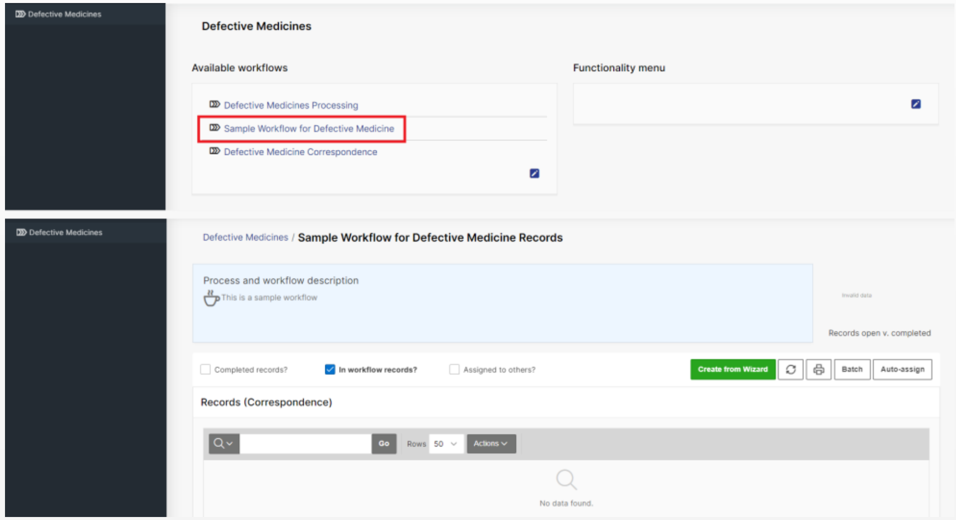
Creating WF
- Save changes



Complete the details in the "Create/ edit workflow" popup to configure a workflow -

- After you complete the WF configuration, use CREATE button to save the details.
- Once a WF is Created, you will see few additional Buttons –
    - Delete – To Delete a WF
    - Copy Workflow – To copy a WF, can be used to create a new similar WF.
    - Save
    - Edit Tasks – Edit task is the second step in configuring a workflow.

After saving the WF configuration, you can view the WF under the selected "Associated Core Process" menu.
But as we have not added any task to the workflow that will be a blank page.

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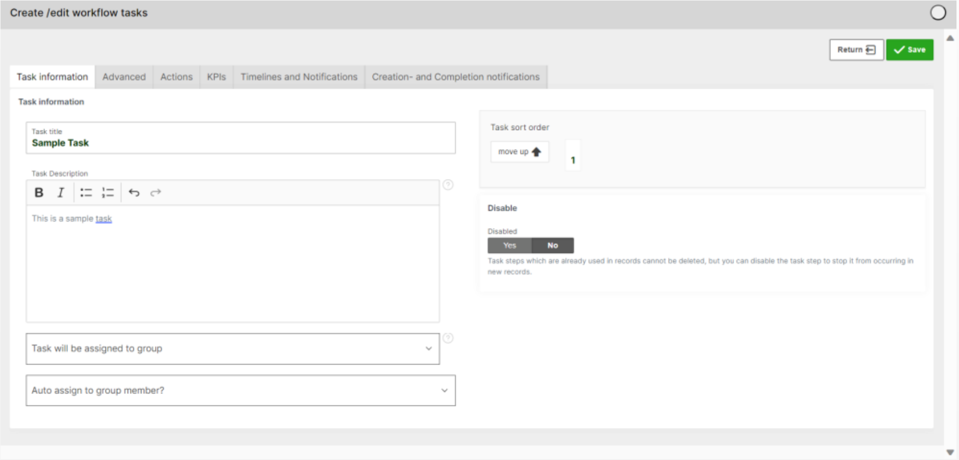
Creating WF
- Add/ Edit Task



The second step in configuring a WF is Configuring WF Tasks.

- Click on EDIT TASKS button to configure workflow tasks at "Create/ edit Workflow" popup.
- Click on CREATE NEW TASK button at "Workflow tasks" popup to create new tasks.
- There will be multiple tabs on the "Create/ edit workflow tasks" popup –
  - Tasks Information – Captures basic details like –
    - Task name, Description, Access control
  - Advanced – Captures details like -
    - Task type (manual / automatic), Conditional Execution, field validation.
  - Actions – Captures the forms (HALOPV Pages) to be used in the task.
  - KPIs – Captures the range of performance index.
  - Timelines and Notifications – Can be used to configure WF timelines and timeline related notifications.
  - Creation and Completion notifications – can be used to configure additional notifications.
- After you complete the WF task configuration, use SAVE button to save the details.

Note – Task automation can be performed using the automation functions designed to perform specific tasks, please feel free to contact HALOPV support with your requirement for a new function.

Note – *Configuring a workflow task is specialised job, please feel free to contact HALOPV support.*

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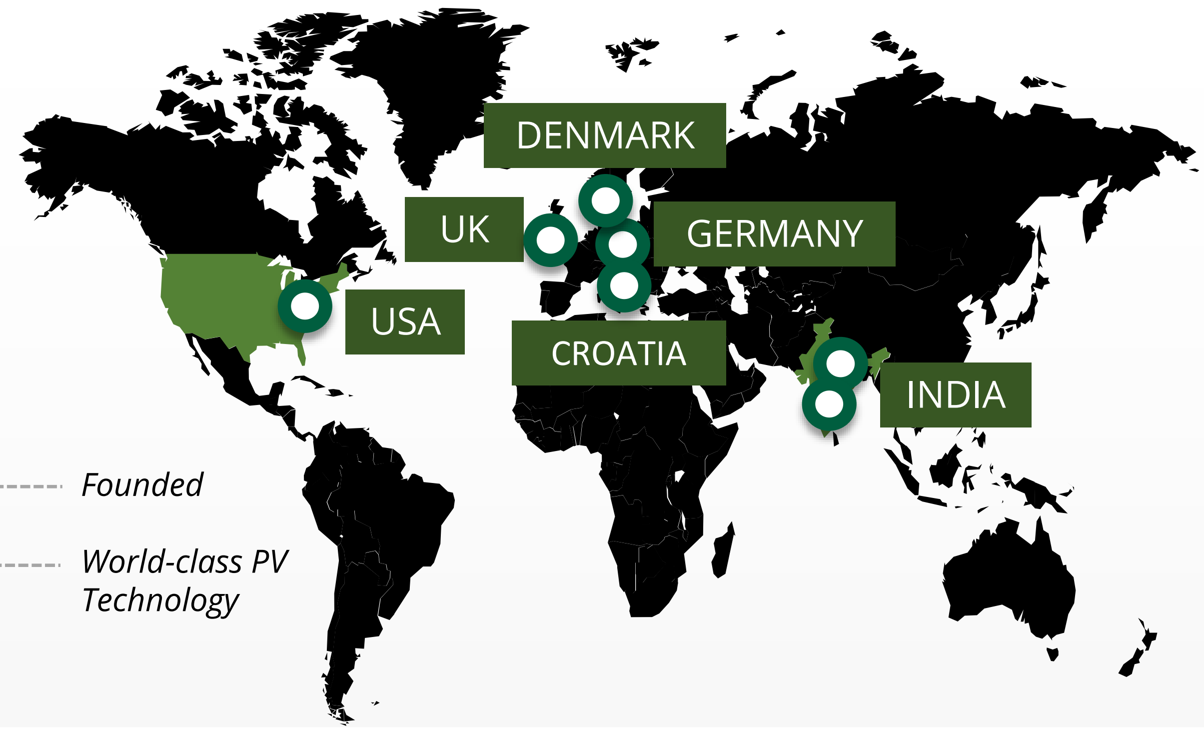

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