

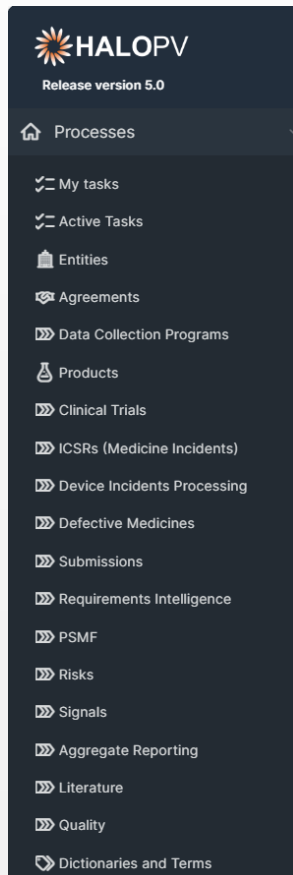
Insife

How to Configure Workflows

Version 1.0, For HALOPV 5.0



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.

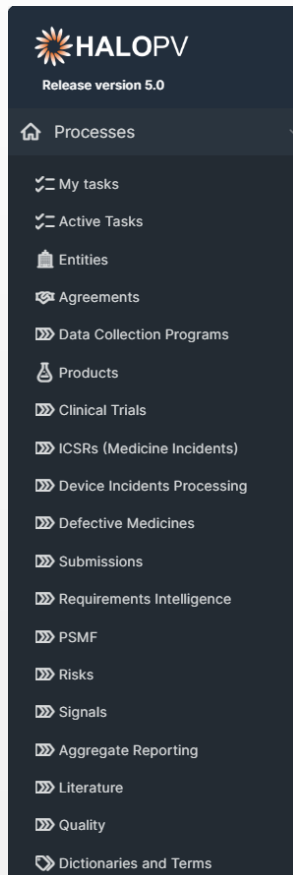
Note – All the workflows and their stages represented here are configurable for their names, stages and lot more, so they may vary in different environments.

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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

Getting to Workflows

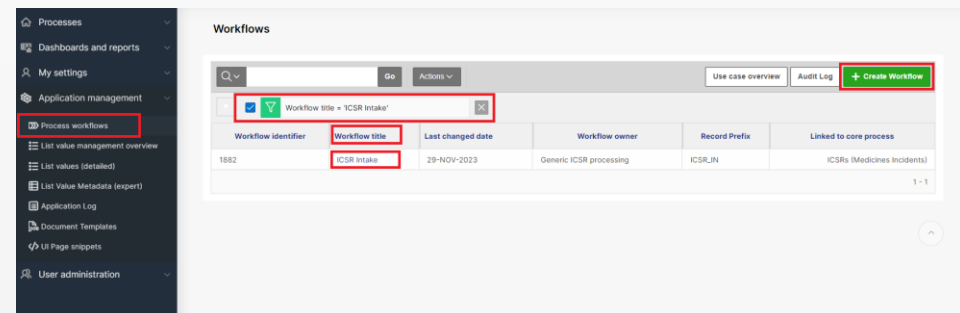
- On the navigation menu (left-hand side of the screen Deep Sea Blue), under “Application Management” parent menu there will be a submenus -
 - Process Workflows – this menu is used to configure workflows in the application.
 - List value (Detailed) – this menu is used to configure most of the list values 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.*



Creating WF - Record Information

The screenshot shows a 'Create / edit workflow' popup window with a 'Record information' tab selected. The form contains the following fields and options:

- Workflow enabled?**: Radio buttons for 'Yes' and 'No'.
- Workflow title**: Text input with value 'Sample Workflow for Defective Medicine'.
- Automatic title keyword context**: Text input with value 'Sample'.
- Record title label**: Text input with value 'Sample Workflow'.
- Icon**: Text input with value 'fa-coffee'. A note below reads '(Used in Treeviews on page 6)'.
- Workflow owner**: Dropdown menu with value 'Application management'.
- Record prefix (10 CH max)**: Text input.
- Associated core process**: Dropdown menu with value 'Defective Medicines'.
- Worklist**: Dropdown menu with value 'Correspondance Worklist'.
- Workflow type**: Dropdown menu with value 'Normal'.
- Incoming Correspondence flow**: Dropdown menu.
- Default parent workflow**: Dropdown menu.
- Default Parent Label**: Text input.
- Default child workflow**: Dropdown menu with value 'Defective Medicines Processing'.
- Default Child Label**: Text input.
- Default details form**: Text input.
- Created automatically**: Section header.
- Description**: Text area with value 'This is a sample workflow'.

A green 'Create' button is highlighted with a red box at the top right of the form.

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

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

The screenshot shows the 'Advanced settings' tab of a workflow configuration interface. It is divided into several sections:

- Record locking:** A section with a 'Lock on Completion' toggle set to 'No'.
- Creation of new records:** A section with three dropdown menus: 'Role required to create records' (set to 'User configuration - Basic user interface'), 'Record create buttons' (set to 'Wizard only'), and 'Copy office documents to working folder when initiating workflow' (set to 'No').
- Fields:** A section with several 'Yes/No' toggle switches:
 - 'Include Organizational entity' (Yes)
 - 'Include Reporting destination' (Yes)
 - 'Show Description field?' (Yes)
 - 'Include territory' (Yes)
 - 'Include Type' (Yes)
 - 'Show Notes field?' (Yes)
 - 'Include Assigned to' (Yes)
 - 'Show Summary field?' (Yes)
- Role required to change Due by:** A dropdown menu.

At the bottom, there is a note: 'OBS: To hide fields on child forms, use the code list Fields configuration (Show/Hide)'.

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)

Tabs			
Record information	Related records	Workflow history	
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Print	Notifications		
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Org. entity tabs			
Persons	Agreement information	Reporting obligations	Territories
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Products / Studies	Roles	Organizations	Benchmarking
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other			
Show the Print help button	Custom help URL link	Sort order (in Menu)	
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text"/>	<input type="text"/>	

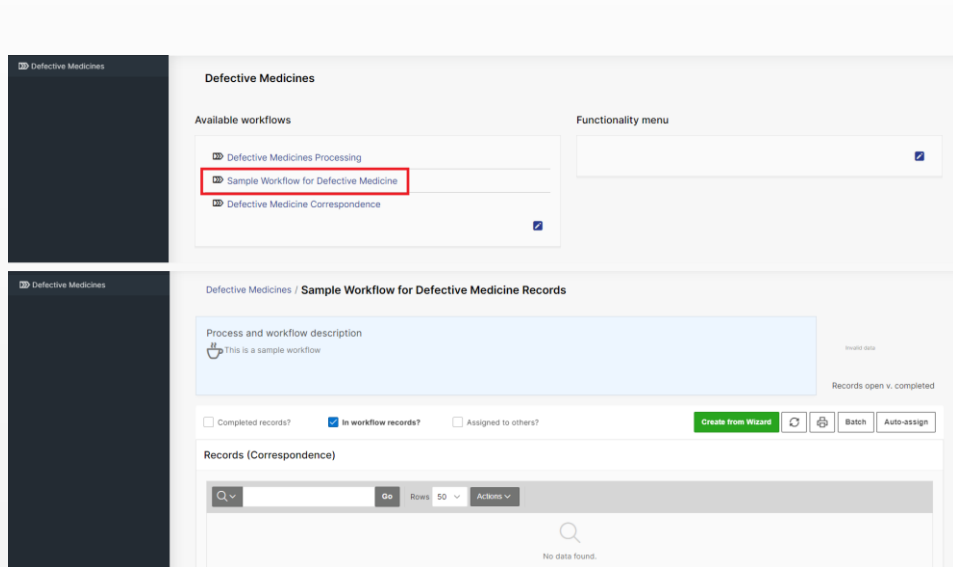
Creating WF - Save changes

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.



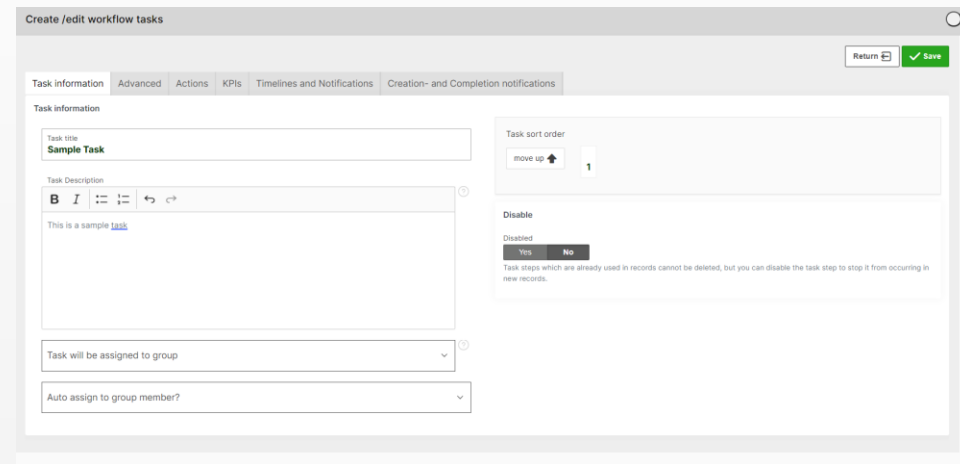
Creating WF - Add/ Edit Task

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.*



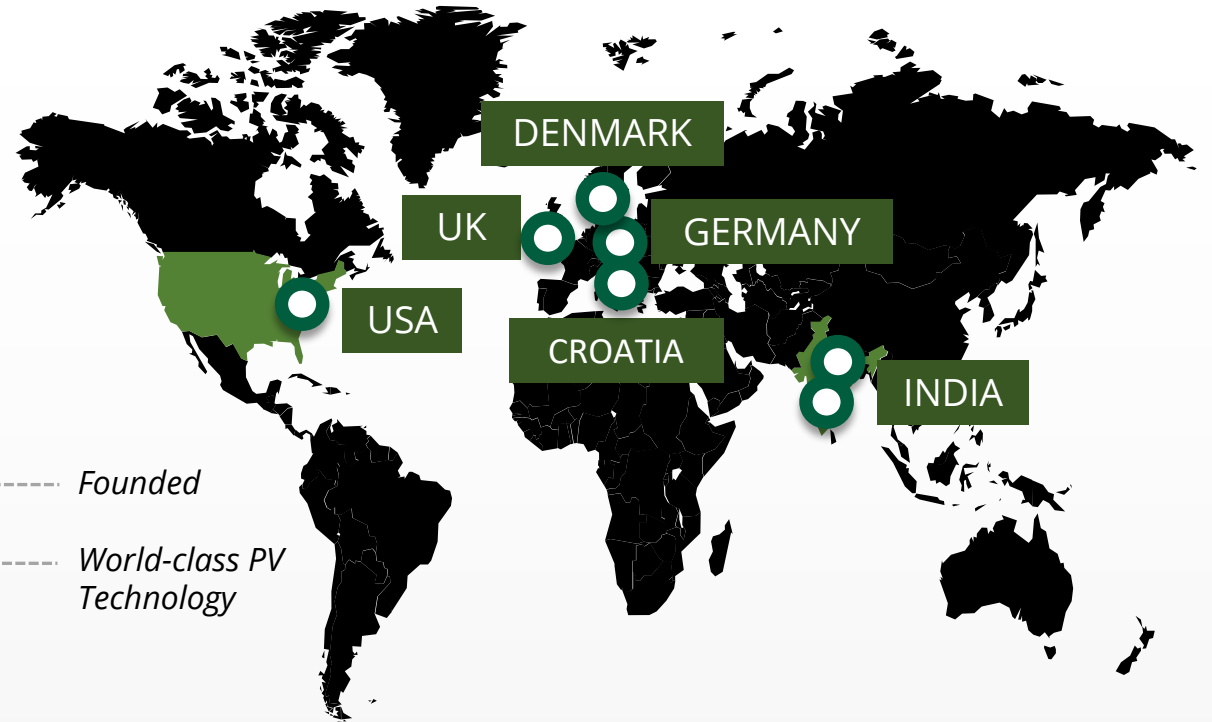
About Insife

Game-changing drug safety **technology** and consulting

Insife are supporting our clients with best-in-class technology and domain expertise from our global footprint

Insife consists of approx. 100 PV FTEs across the world, making us the biggest Europe-based company of its kind

We are ISO 9001, ISO 27001, ISO 14001 and GDPR certified



2017 ----- *Founded*

2023 ----- *World-class PV Technology*

Who are using our technologies?

5

Tier-1 Pharma companies

2

Tier-1 Regulatory Agencies

20+

SME pharma /biotechs

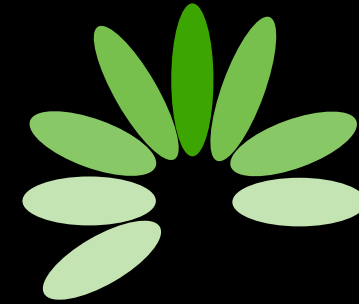
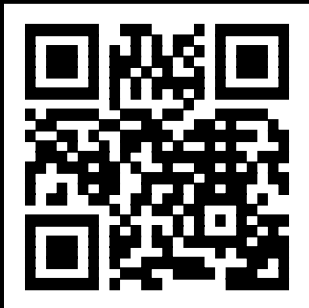


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