

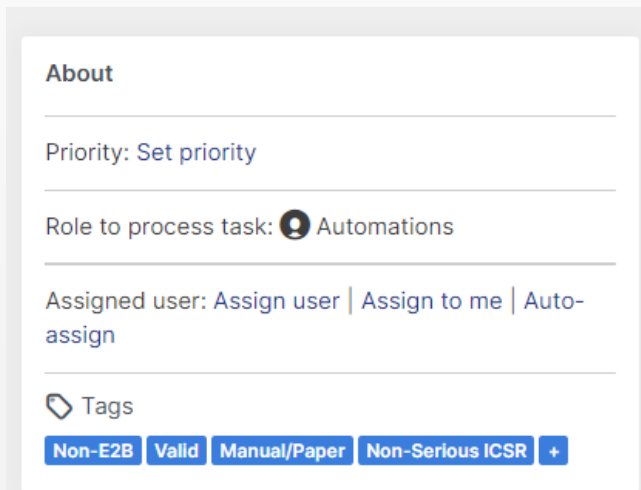
Insife

# How to Configure HALOPV Tags

Version 1.0, For HALOPV 5.0



# About HALOPV Tags



The screenshot shows a task configuration page with the following elements:

- About** section with a horizontal separator line.
- Priority:** Set priority
- Role to process task:** Automations (with a person icon)
- Assigned user:** Assign user | Assign to me | Auto-assign
- Tags** section with a tag icon and a list of tags: Non-E2B, Valid, Manual/Paper, Non-Serious ICSR, and a plus sign (+).

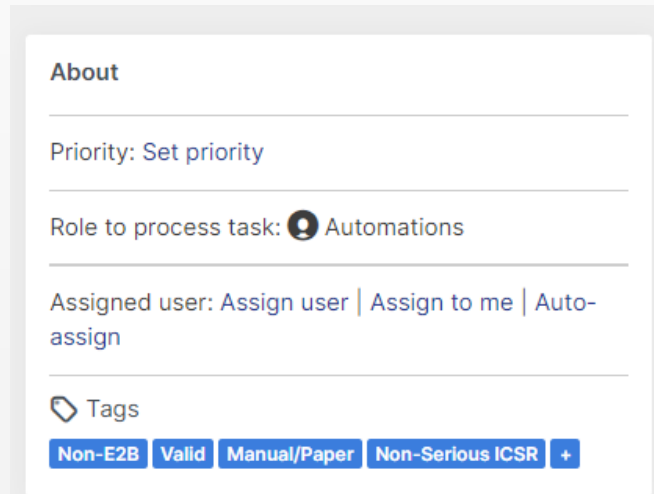
- HALOPV Tags are smart way to identify a record based on its data/ characteristics and/ or taking further action on them like Bulk Updates, Generating reports etc.
- Tags can be applied on any workflow including Studies, Projects, Products, ICSR and all the others.
- HALOPV Offers two types of tags –
  - Automatic Tags – these are the pre-configured tags which automatically apply on a workflow based on certain configurable criteria.
    - You will see automatic tags getting applied on a record as soon as you create it.
  - Manual tags – Users can open any record of any workflow and can tag it manually.
    - You can add a manual tag on a record by using the + button and selecting the Tag.
    - You can click on a Tag and edit or remove it form the record.

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# Prerequisite

## Configuring a Tag



The screenshot shows a configuration interface for a task. It includes the following elements:

- About**: A section header with a horizontal line below it.
- Priority**: A field with the text "Set priority" and a horizontal line below it.
- Role to process task**: A field with a person icon and the text "Automations" and a horizontal line below it.
- Assigned user**: A field with the text "Assign user | Assign to me | Auto-assign" and a horizontal line below it.
- Tags**: A section header with a tag icon and the text "Tags". Below it are four blue buttons: "Non-E2B", "Valid", "Manual/Paper", and "Non-Serious ICSR", followed by a plus sign button.

### Pre-requisite to be able to configure a Tag are –

- User must have access to Application Management.
- User must have ADD/ EDIT permission on “List Value (Detailed)”.

### Automatic Tags –

- Automatic tag gets triggered as per configured condition defined using SQL Query, to configure or update an automatic Tag, user must be aware of HALOPV schema and basic SQL.
  - Please reach to HALOPV Support to configure an automatic tag.

# Getting to Tags

- On the navigation menu (left-hand side of the screen Deep Sea Blue), under “Application Management” parent menu there will be a submenu -
  - List value (Detailed) – this menu is used to configure most of the list values at HALOPV.
- Select “validation and keyword” using “List value items”.
- Apply a filter “Keyword” on “Type” column.
  - This gives you all the existing tags at HALOPV.
  - All the Automatic tags have a SQL query at “Criteria (return one and only one value trigger)” column.

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

The screenshot shows the HALOPV application management interface. The left-hand navigation menu is visible, with 'List values (Detailed)' selected. The main content area displays the 'List of values' configuration page. At the top, there are 'Parameters' and 'List of values' sections. A red box highlights the 'List value items' dropdown menu, which is set to 'Validations and keywords'. Below this, there is a search bar and a 'Go' button. A second red box highlights the filter 'Type = Keyword' applied to the table. The table has columns for ID, Rule / Tag name, Criteria, Duplicate search weight, Nullified Date, Factory Value?, Validation message / Tag context, Execution order, Only run on specific workflow task step, Created, Limit to Group, and Limit proc. Two rows are visible: 'Non-valid' and 'Pregnancy'. The 'Pregnancy' row has a SQL query in the 'Criteria' column: 'select 'Black Triangle' from gom\_process\_master m join gom\_e2br3\_g\_k\_p on p.master\_id = m.master\_id and p.revision = ...'

# Creating Manual Tags

The screenshot shows a web form titled "Create/edit List Values" with three tabs: "List value information", "Static information", and "Limit access". The "List value information" tab is active. The form contains several fields: a text area for "Description / Requirements traceability" with a sub-note "Add a link to the requirement or specification governing this value (Optional)"; an "ID" field containing "104204"; a "Duplicate search weight (0-1 - i.e. 0.7) / Score" field; a "Type" dropdown menu with "Keyword" selected, highlighted by a red border; a "Rule / Tag name" field; and a "Criteria (return one and only one value trigger)" field. At the bottom, there are "Cancel" and "Create" buttons, with the "Create" button highlighted by a red border.

Manual tags are those tags which a user applies manually on a record. To create a manual tag -

- Click on CREATE Button.
- Fill the details in “Create List Values” popup.
- Critical Fields are –
  - Rule/ Tag Name – Name of the tag.
  - Type – “Keyword” needs to be selected to create a Tag.
  - Only Run on specific workflow step – If you want to restrict the tag to a particular workflow, select its name from this list.
  - Limit Access – You can limit the tags availability to a “Process” or “User role” using this tab.
- Use CREATE button to save the details.

# Creating Automatic Tags

Create/edit List Values

List value information | Static information | Limit access

List value information

Description / Requirements traceability  
Add a link to the requirement or specification governing this value (Optional)

ID  
104206

Duplicate search weight (0-1 - i.e. 0.7) / Score

Type  
Keyword

Rule / Tag name

Criteria (return one and only one value trigger)  
`select 'Nullified case' VAL from gom_process_master m join gom_e2br3_c c on c.master_id = m.master_id and c.revision = m.revision where m.master_id = 1 and m.revision = GOM_CURRENT_PREC_REVISION(m.master_id) and c_1_11_1 = 1`

Cancel Create

Automatic tags are those tags which gets applied automatically on a workflow. The only difference between an automatic tag and a manual tag is the Criteria/ trigger condition, system reads this condition to apply a tag. To create an automatic tag, Insert criteria while creating a Tag -

- Criteria – Insert the condition (SQL) statement which act as a trigger for the application.

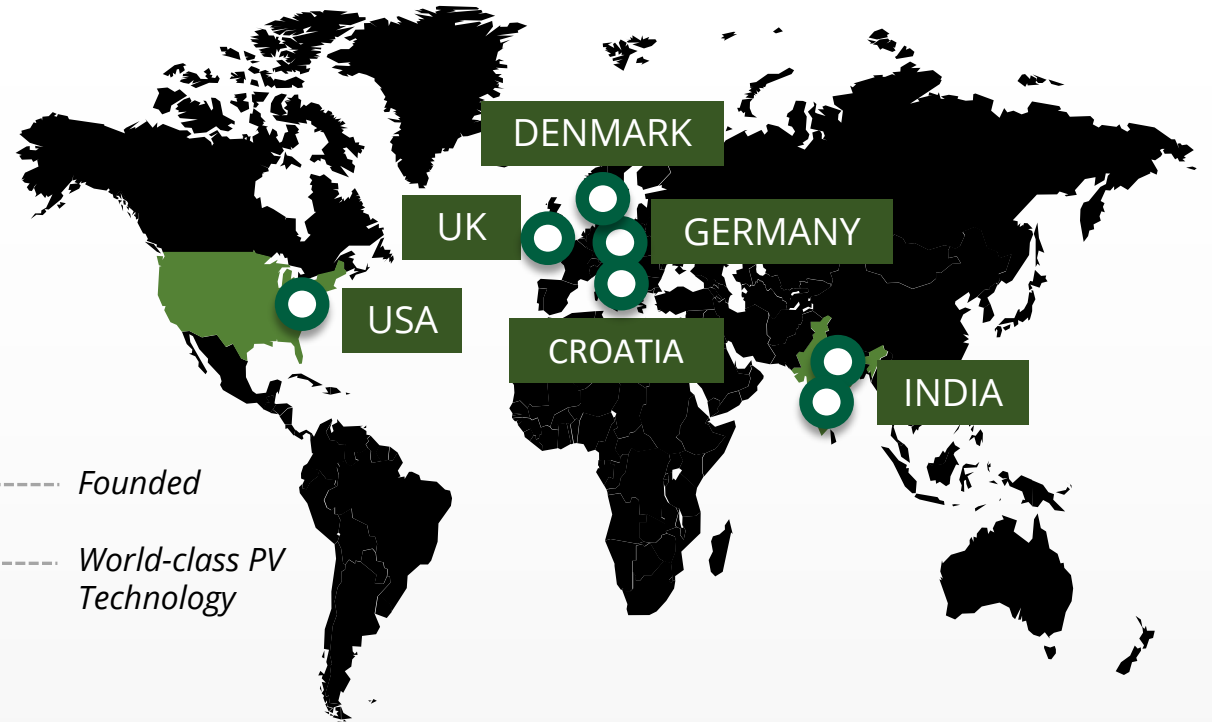
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*Who are using our technologies?*

**5**

Tier-1 Pharma companies

**2**

Tier-1 Regulatory Agencies

**20+**

SME pharma /biotechs



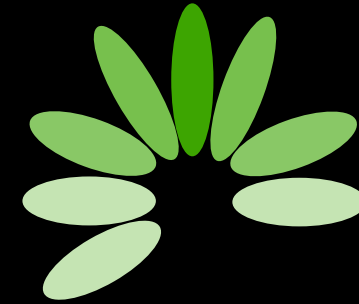


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