

# Insife

## **How to Configure a User**

Version 1.0, For HALOPV 5.0



# About Users at HALOPV

- Users at HALOPV are similar to users at any other application, they have unique identifiers, few profile details, roles-based access and can work only for their Entity.

## User settings

### My information

Username:  
Tenant: 2

Full name: /  
Home territory:  
Home region:

### Functionality menu

 My roles

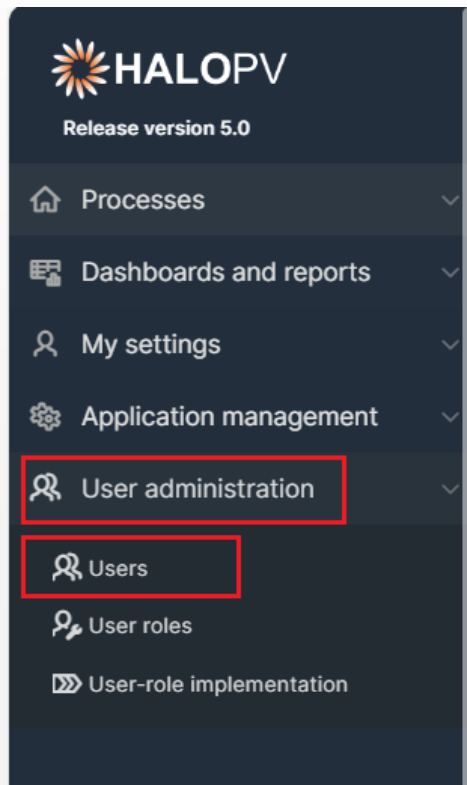
[Edit my information](#)

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# Prerequisite

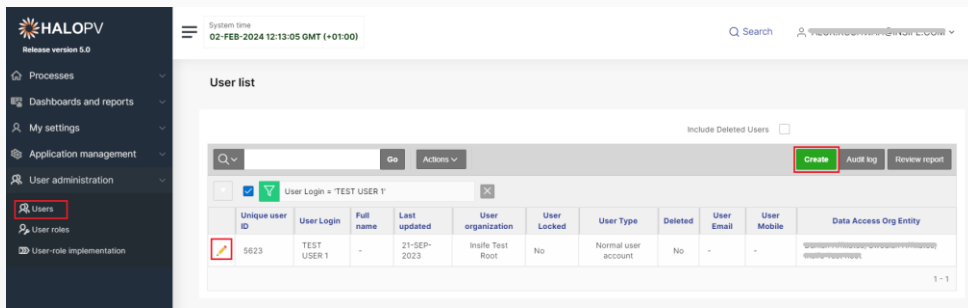
## Configuring a User



### Pre-requisite to be able to configure a User are -

- User must have access to User Administration.
- User must have permission to Add Or Update a User.

# Getting to User Details



- On the navigation menu (left-hand side of the screen Deep Sea Blue), under “User administration” parent menu there will be a submenu -
  - Users – this menu is used to display all the users configured in the application for the entity you are working with.
  - The Grid at User List page displays some basic details about the users, such as –
    - Unique user ID, User Login, Full name, Last updated, User Email, User Mobile
    - User organization – Name of the entity user can work on.
    - User Locked – Displays if user account is locked or not.
    - User Type – Normal User/ Light User/ Distribution group
      - Light users are "virtual" users which can be used for notification purposes or to specify peoples roles in an organization without giving the users the ability to log into HALO.
      - Distribution groups are used to add mail groups to the system. These can be used for notification purposes.
    - Data Access Org Entity - Name of the entities user can access.
  - You can Create a new user by using CREATE button or Update an user by using EDIT button (Pencil Icon) for the respective user.

Note – *HALOPV Supports both Multi-tenant and individual deployments, in either case user can view or access data only of his tenant.*

# Create/ Update a User

You can create/ Update a user using the “User Information” popup. Fill out all the details to create/ Update a user, few key fields are -

- Enter User Credentials, password entered here will be for one time use only.
- Full Name and contact details. Email entered here will be used to send notifications.
- User Type - Normal User/ Light User/ Distribution group
  - Light users are "virtual" users which can be used for notification purposes or to specify peoples roles in an organization without giving the users the ability to log into HALO.
  - Distribution groups are used to add mail groups to the system. These can be used for notification purposes.
- Organization Data Access - Name of the entities user can access.
- Default language and Country – This will be used to pre-populate sender language and country at HALOPV.
- Lock User – Used to lock or unlock a locked user.
- Delete user – Used to soft delete a user.
- Click on CREATE/ SAVE button to save the details and create a new user.

The screenshot shows a 'User Information' form with the following sections:

- User login details:** Includes 'User login' and 'Password' fields. A note states: 'Mandatory for initial creation. When saving an existing user, use this field to update the user password.'
- Organizational data access:** Features a search bar for 'All Text Columns' with 'Go', 'Edit', 'Save', and 'Add Row' buttons. Below is a table with one row for 'Organization' and a note: 'No other organizations configured'.
- Notifications and Workflow:** Contains 'Email notifications' (Yes/No), 'Enforce secure mail?' (Yes/No) with a note: 'If set to No, users cannot receive reports in Emails - Instead the user receives a link to HALO.', and 'Enable notes on task completion' (Yes/No).
- Assignments and Experience:** Includes 'Allow task assignments to me' (Yes/No) and 'Experience level' (New hire).
- Locking and deleting:** Contains 'Delete user?' (Yes/No) with a note: 'Removes the user from all lists except historic records (Audit trails etc.)', and 'Lock user?' (Yes/No) with a note: 'Prevents the user from logging into the system'.

# Updating User Roles

HALOPV is a highly configurable system, it works on user roles to grant access of various functionalities/ workflow's/ processes/ menu's across the application.

User roles be update by using the SETUP ROLES icon at the user Information popup, this will open "User admin - List groups of selected user" popup -

- Click on ADD ROW to add a new row in Roles Grid and select the role you want to add.
- You can Delete a row using the Context menu of respective row or select multiple rows and then using Grid Context menu.
- Click on SAVE button to save the user role changes.
- Click on RETURN button to return to user details popup.

The screenshot shows the 'User information' form. The 'Setup roles' button is highlighted with a red box. The form includes fields for user login details, full name, organizational entity, and user type. There are also sections for 'Organizational data access', 'Notifications and Workflow', 'Assignments and Experience', and 'Locking and deleting'.

The screenshot shows the 'User admin - List groups of selected user' popup. It displays a table with columns for 'User', 'Group', and 'Readonly'. A context menu is open over the first row, showing options like 'Add Row', 'Duplicate Row', 'Delete Row', 'Refresh Row', and 'Revert Changes'.

User	Group	Readonly
TEST123@TEST.COM	Investigator	<input type="checkbox"/>
TEST123@TEST.COM		<input type="checkbox"/>

Note – *Updating user role are specialised job, please contact HALOPV Support to get more details on roles and their associated functionalities.*

Note – *User roles can only be updated/ added while Editing a user. You need to first create a user and then open it in edit mode to add user roles.*

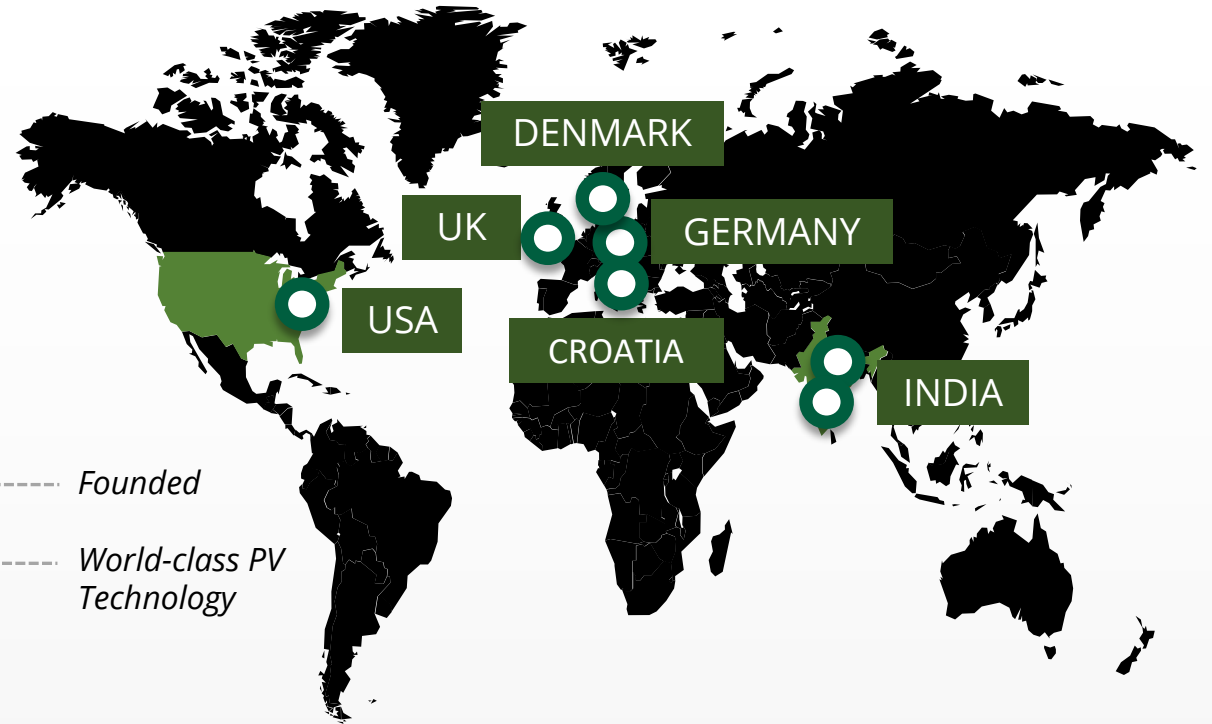
# About Insife

## 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



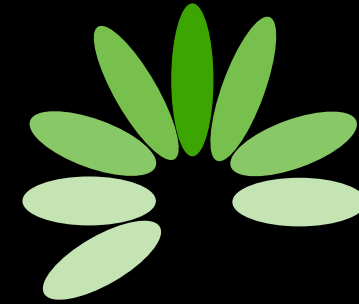


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