# Application Management

How Application Management works for Process workflows

HALOPV 3.0

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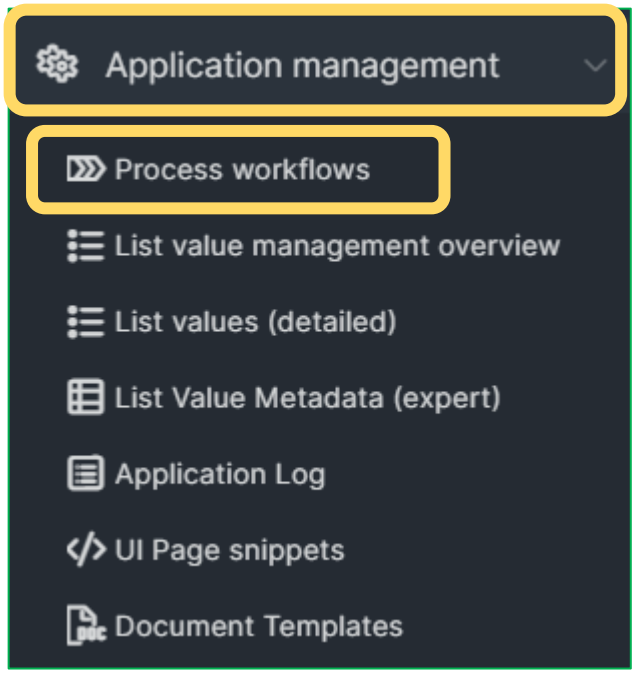
# How to configure Process workflows in HALOPV




In the **Application management > Process workflows,** the authorized user can find all available workflows and configure new workflow(s) for HALOPV.

**Note:** The user should have **Application Management** role to perform this action

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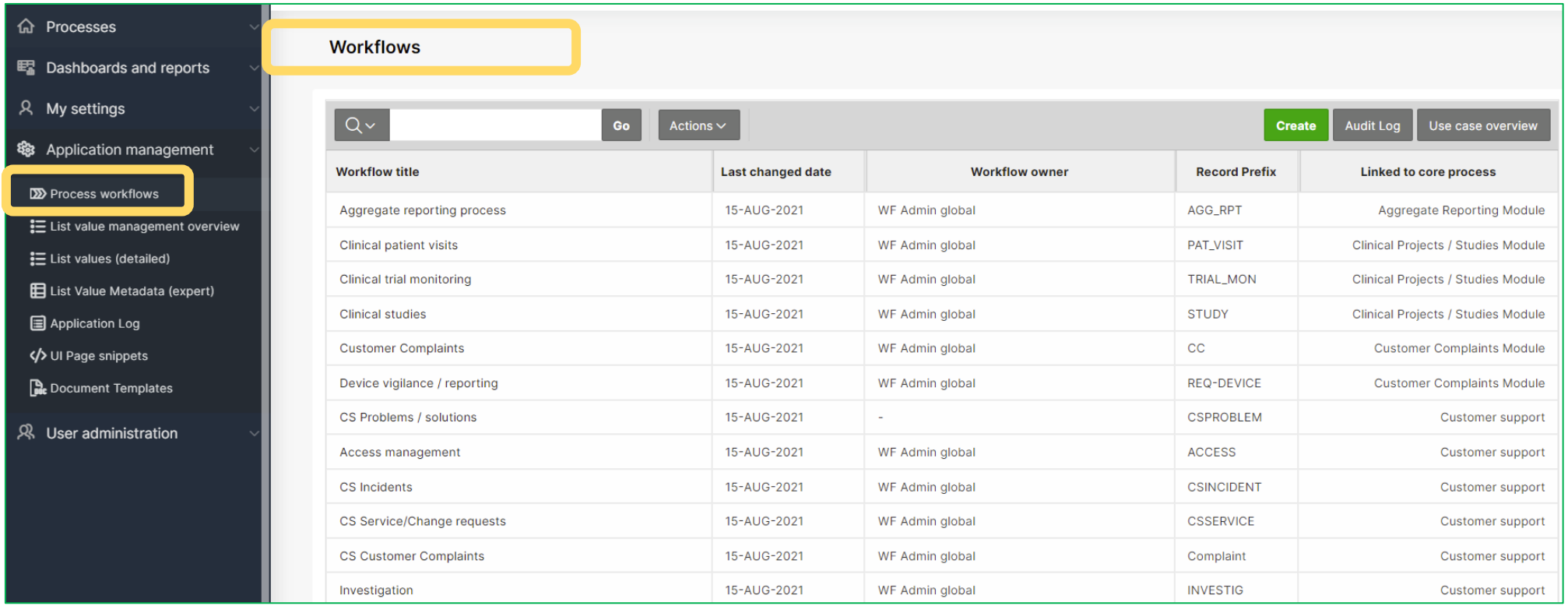
# How to review Workflows in HALOPV




| Workflow title | Last changed date | Workflow owner | Record Prefix | Linked to core process |
|---|---|---|---|---|
| Aggregate reporting process | 15-AUG-2021 | WF Admin global | AGG_RPT | Aggregate Reporting Module |
| Clinical patient visits | 15-AUG-2021 | WF Admin global | PAT_VISIT | Clinical Projects / Studies Module |
| Clinical trial monitoring | 15-AUG-2021 | WF Admin global | TRIAL_MON | Clinical Projects / Studies Module |
| Clinical studies | 15-AUG-2021 | WF Admin global | STUDY | Clinical Projects / Studies Module |
| Customer Complaints | 15-AUG-2021 | WF Admin global | CC | Customer Complaints Module |
| Device vigilance / reporting | 15-AUG-2021 | WF Admin global | REQ-DEVICE | Customer Complaints Module |
| CS Problems / solutions | 15-AUG-2021 | - | CSPROBLEM | Customer support |
| Access management | 15-AUG-2021 | WF Admin global | ACCESS | Customer support |
| CS Incidents | 15-AUG-2021 | WF Admin global | CSINCIDENT | Customer support |
| CS Service/Change requests | 15-AUG-2021 | WF Admin global | CSSERVICE | Customer support |
| CS Customer Complaints | 15-AUG-2021 | WF Admin global | Complaint | Customer support |
| Investigation | 15-AUG-2021 | WF Admin global | INVESTIG | Customer support |

On clicking on **Process workflows ,** the user can review all available workflows configured in the system.
It displays the **Workflow title**, **Last changed date**, **Workflow owner**, **Record Prefix** and **Linked to core process**.

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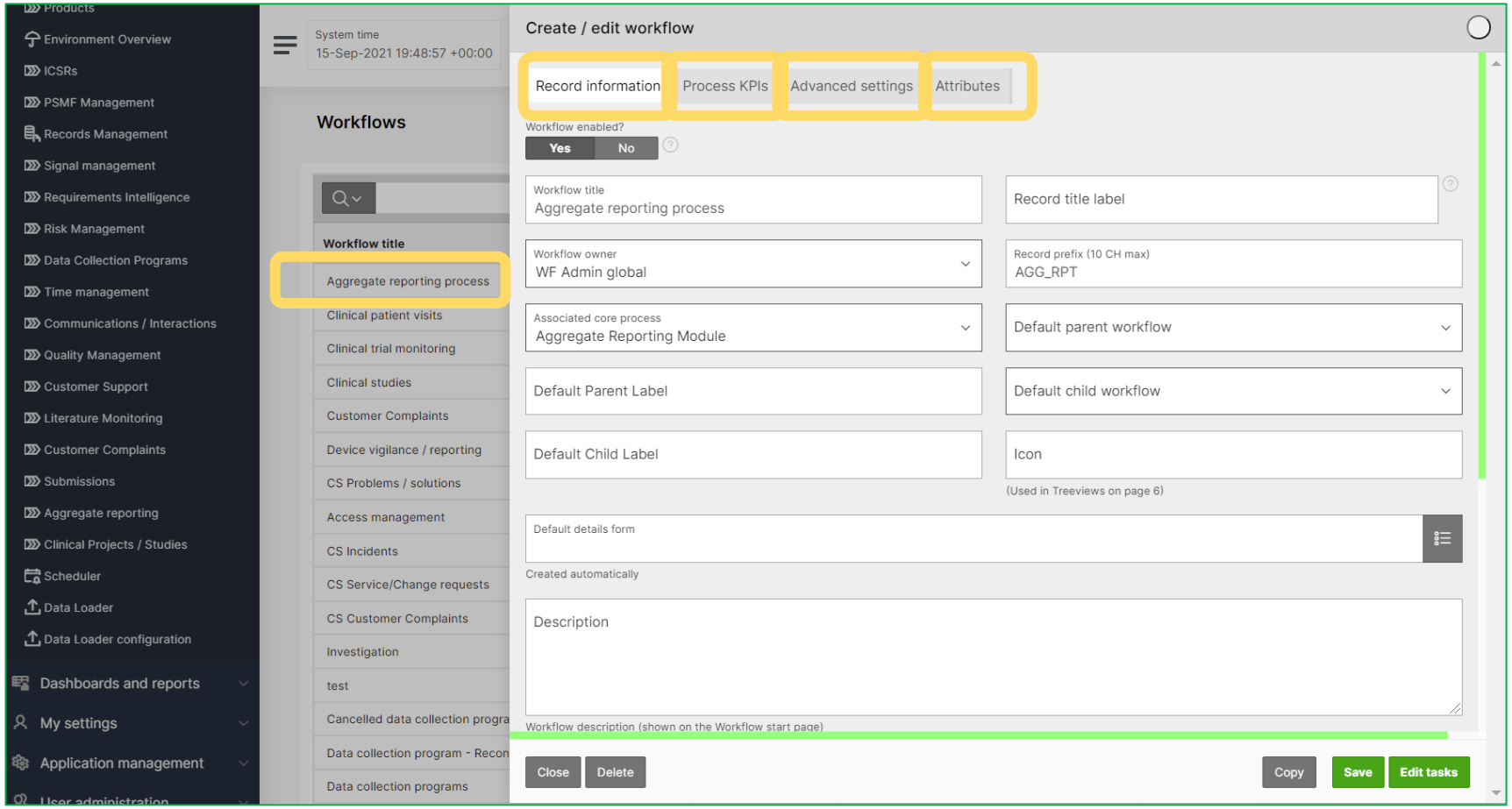
# Viewing / Editing Workflows in HALOPV




Clicking on a Workflow title will open up the Create / edit workflow window that displays the details in 4 different tabs, **Record information, Process KPIs, Advanced settings** and **Attributes.**

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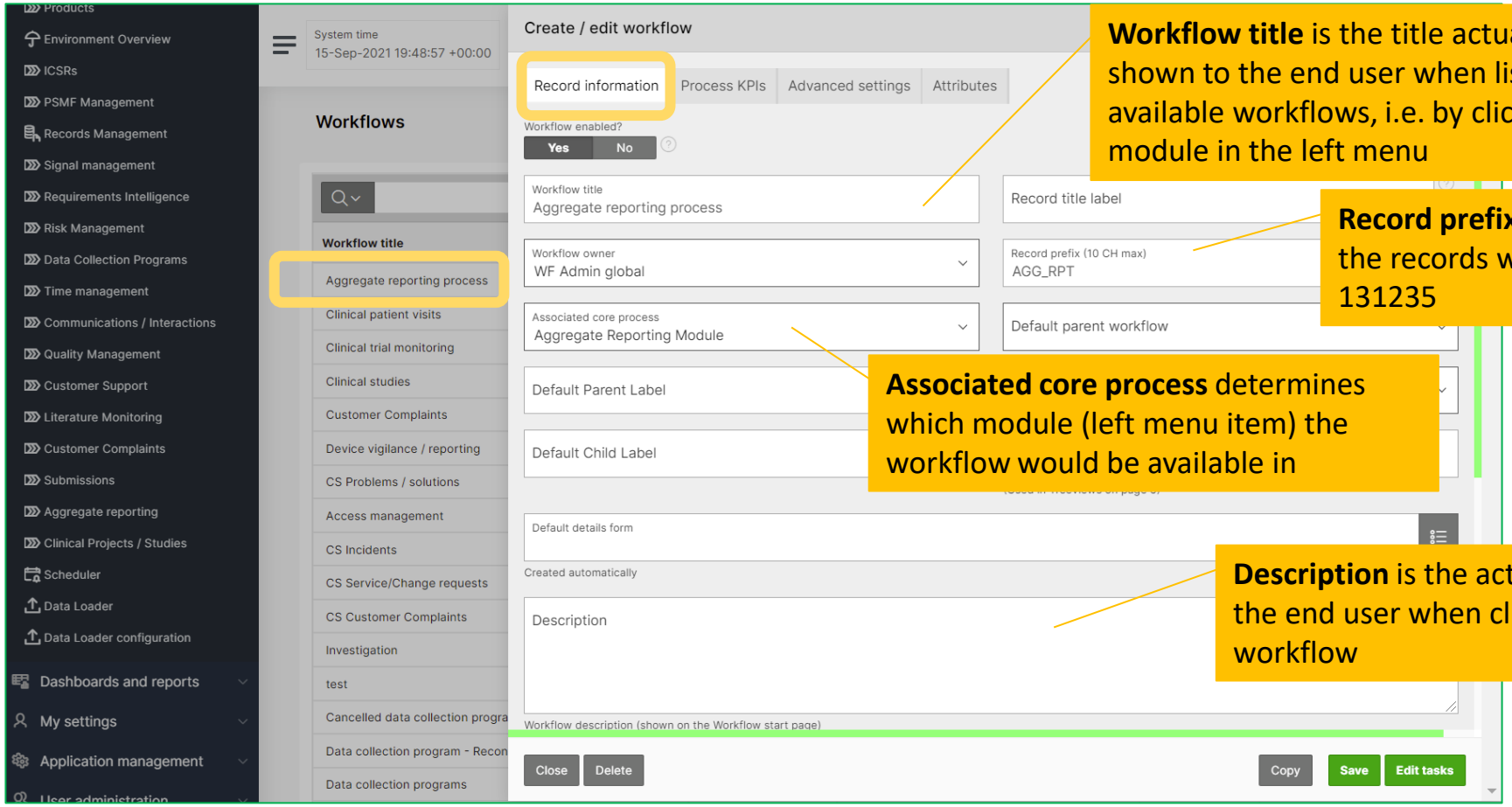
# Viewing / Editing Workflows in HALOPV




**Workflow title** is the title actually shown to the end user when listing the available workflows, i.e. by clicking on a module in the left menu

**Record prefix** is short identification of the records when listed. E.g. AGG_RPT-131235

**Associated core process** determines which module (left menu item) the workflow would be available in

**Description** is the actual text shown to the end user when clicking on a workflow

The **Record information** tab displays driving specifics of selected Workflow like **Workflow owner** & **Associated core process along** with other fields.

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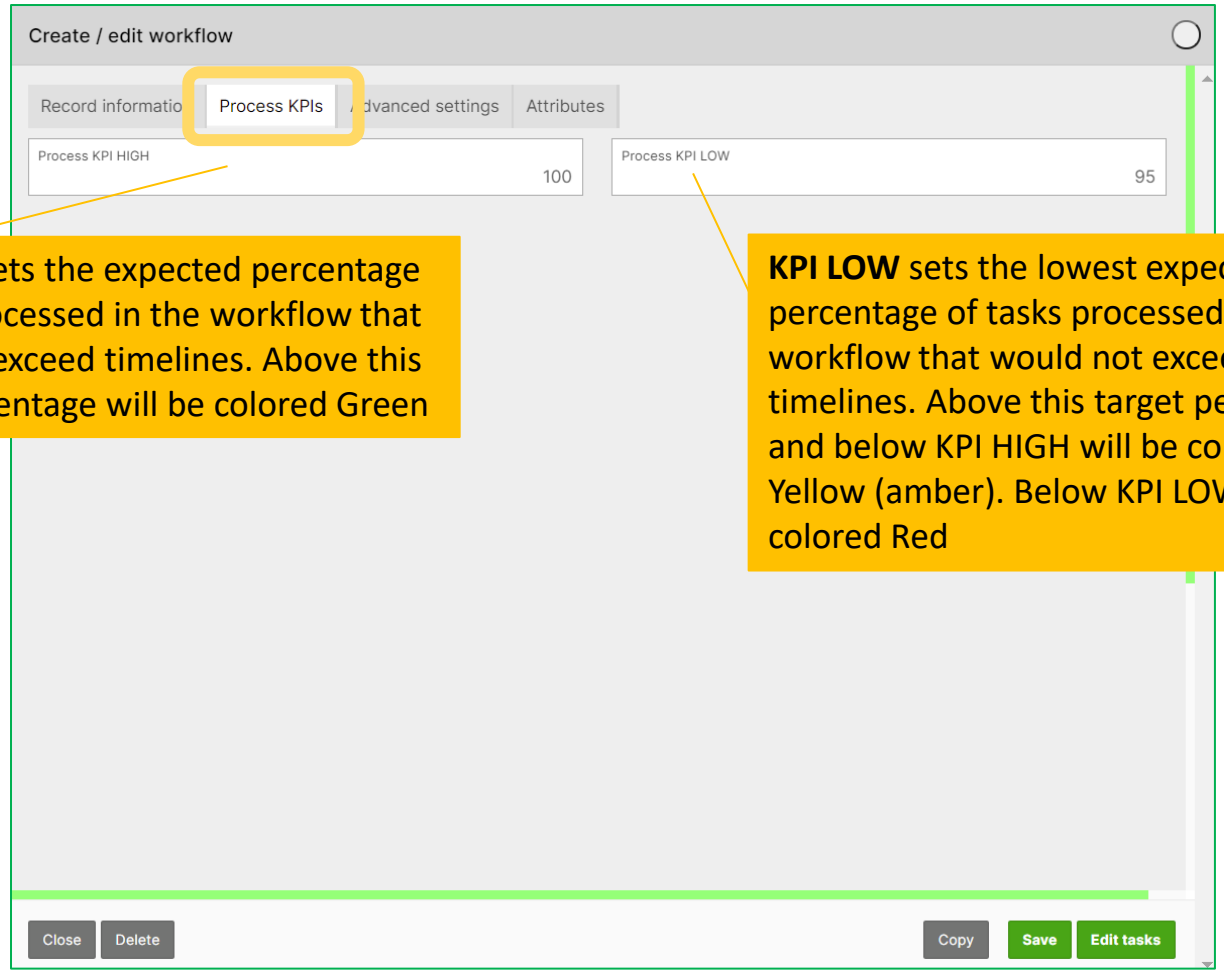
# Viewing / Editing Workflows in HALOPV




**KPI HIGH** sets the expected percentage of tasks processed in the workflow that would not exceed timelines. Above this target percentage will be colored Green

**KPI LOW** sets the lowest expected percentage of tasks processed in the workflow that would not exceed timelines. Above this target percentage and below KPI HIGH will be colored Yellow (amber). Below KPI LOW will be colored Red

The **Process KPIs** tab displays KPI high and low.

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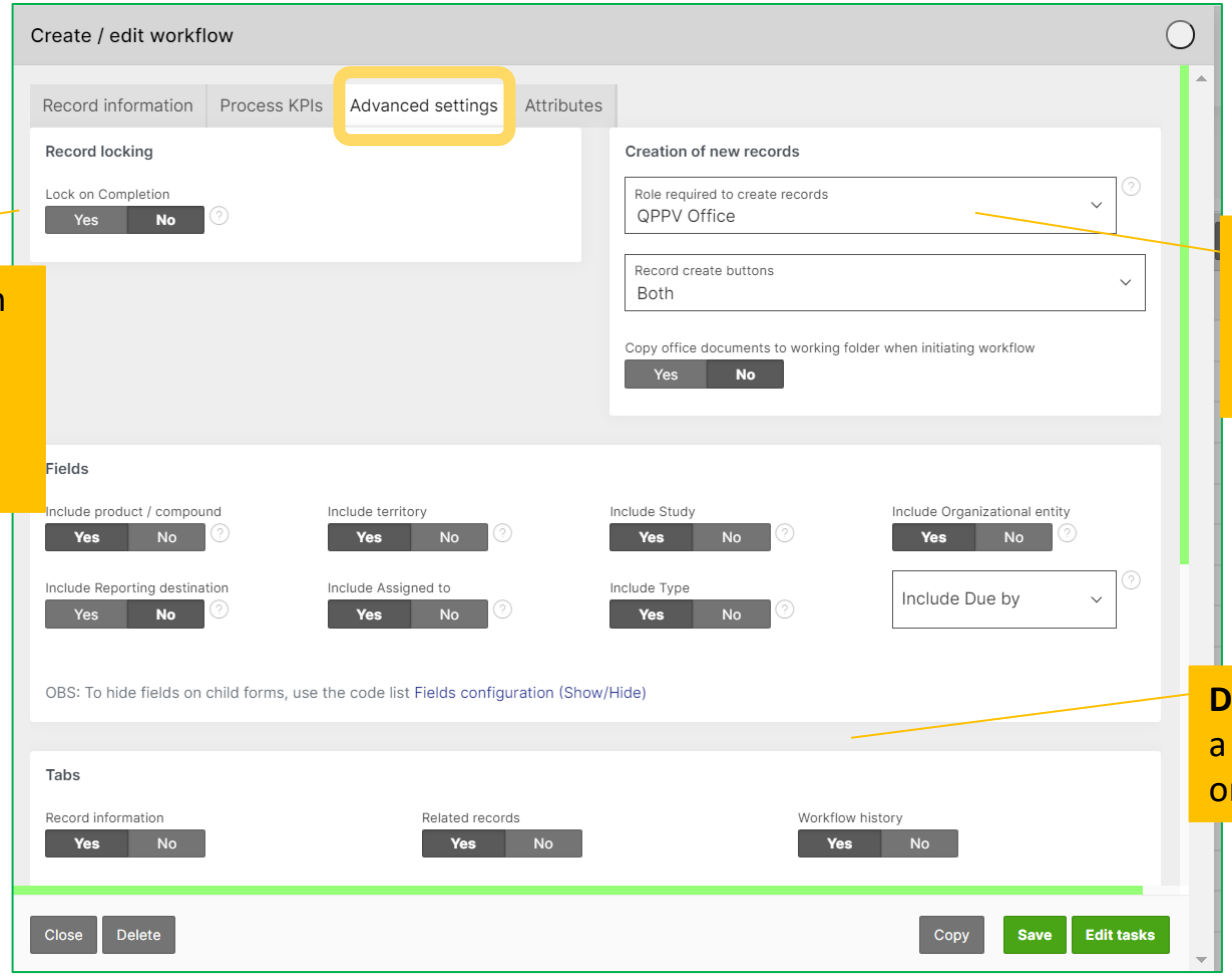
# Viewing / Editing Workflows in HALOPV




**Lock on Completion** (default) sets each record that is completed in a locked state, where it is required to re-initiate to a new record revision in order to do updates

**Role required to create records** can be set to a specific role, which would be required to be subscribed to as an end user in order to start a new record

**Different switches** that toggle whether a field or tab is shown to the end user or not

The **Advanced settings** tab displays the parameters that define the workflow accessibility, availability and details on how this workflow will operate.

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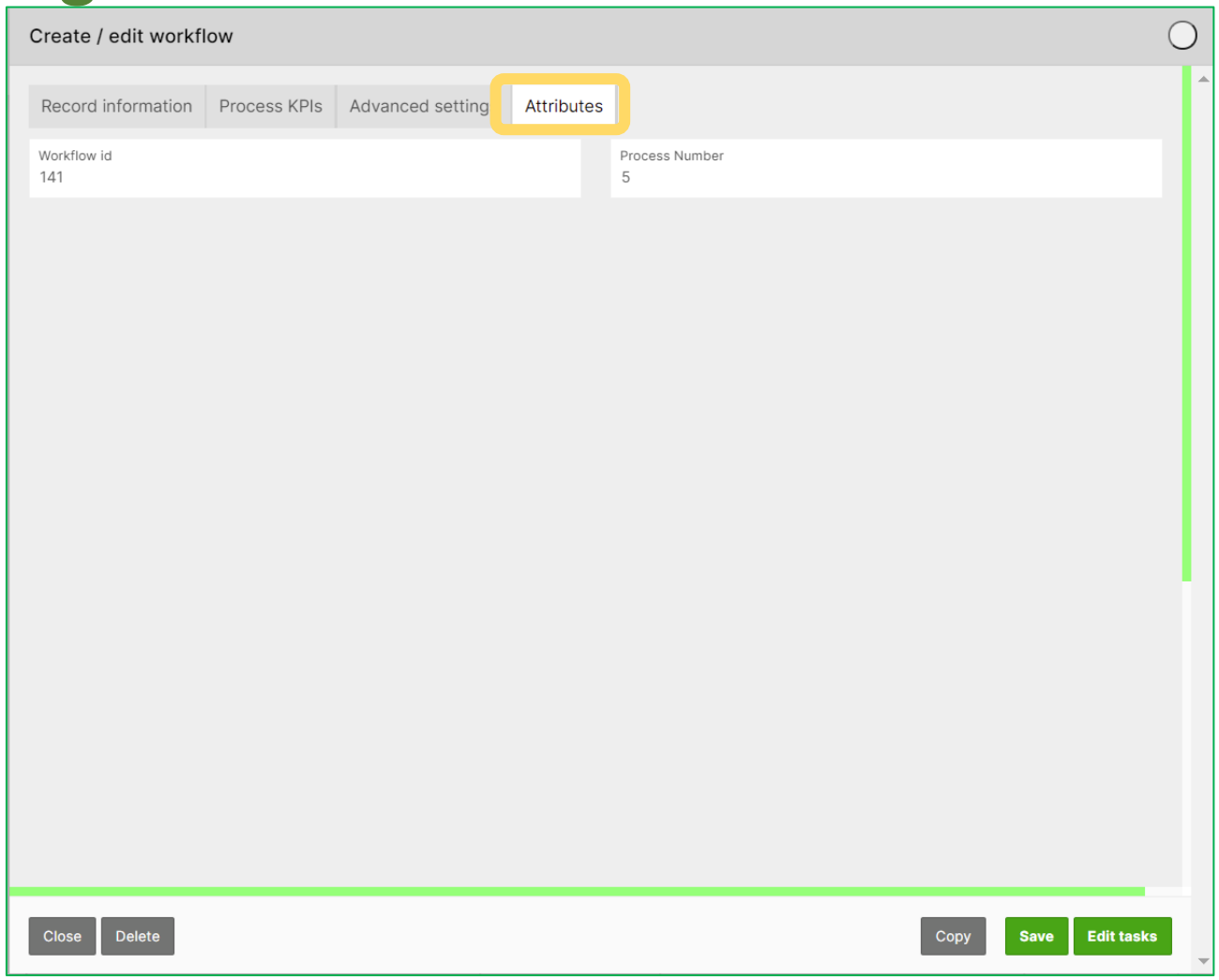
# Viewing / Editing Workflows in HALOPV




The **Attributes** tab displays the parameters that are not editable and is only a reference for technical needs.

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# Viewing / Editing Workflows tasks in HALOPV

Create / edit wo

Record informat

Workflow id
141

Workflow tasks

Go | Actions | Return | Create | Audit Log

| | Task identifier | Wf task sortorder | Workflow | Task name | Days allocated for task | Days overdue before escalation | Created date | Last changed date | Task type | Automation | Lock | Disabled |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 422 | 1 | Aggregate reporting process | Draft aggregate report body | 14 | 14 | 24-JAN-2021 | 16-SEP-2021 | Manual | - | | - |
| | 421 | 2 | Aggregate reporting process | Initiate aggregate report | 14 | 14 | 24-JAN-2021 | 16-SEP-2021 | Manual | - | | - |
| | 441 | 3 | Aggregate reporting process | Kick-off meeting | 14 | 14 | 24-JAN-2021 | 10-SEP-2021 | Manual | - | | - |
| | 442 | 4 | Aggregate reporting process | Data clean-up | 7 | 5 | 24-JAN-2021 | 10-SEP-2021 | Manual | - | | - |
| | 423 | 5 | Aggregate reporting process | Review aggregate report | 14 | 14 | 24-JAN-2021 | 10-SEP-2021 | Manual | - | | - |
| | 443 | 6 | Aggregate reporting process | Submit to Authorities | 14 | 14 | 24-JAN-2021 | 10-SEP-2021 | Manual | - | | - |
| | 424 | 7 | Aggregate reporting process | Sign-off aggregate report | 14 | 14 | 24-JAN-2021 | 10-SEP-2021 | Manual | - | | - |

Close | Delete | Copy | Save | Edit tasks

Clicking the **Edit tasks** button tab displays the associated workflow tasks.

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# Viewing / Editing Workflows tasks in HALOPV

Workflow tasks

Go | Actions

| | Task identifier | Wf task sortorder | Workflow | Task name | Days allocated for task | Days over befo esca |
|---|---|---|---|---|---|---|
| | 422 | 1 | Aggregate reporting process | Draft aggregate report body | 14 | |
| | 421 | 2 | Aggregate reporting process | Initiate aggregate report | 14 | |
| | 441 | 3 | Aggregate reporting process | Kick-off meeting | 14 | |
| | 442 | 4 | Aggregate reporting process | Data clean-up | 7 | |
| | 423 | 5 | Aggregate reporting process | Review aggregate report | 14 | |
| | 443 | 6 | Aggregate reporting process | Submit to Authorities | 14 | |
| | 424 | 7 | Aggregate reporting process | Sign-off aggregate report | 14 | |

Create /edit workflow tasks

Task information | Advanced | Actions | KPIs | Notification and escalation | Creation- and Completion notifications

Task information

Disabled: Yes / No

Task steps which are already used in records cannot be deleted, but you can disable the task step to stop it from occurring in new records.

move up

Task sort order: 1

Task title: Draft aggregate report body

Task Description

Task will be assigned to group: Aggregate Report Medical Writer

Return | Save | Delete

**Task title** is the title actually shown to the end user when taking a record through the workflow

**Task description** is the actual description of the task, shown to the end user when taking a record through the workflow

**Task assignment** is the user group/role that is required for a user to be able to process the task

Clicking the icon for any task opens up that specific task details workflow window that displays the details in 6 different tabs **Task information, Advanced, Actions, KPIs, Notification and escalation,** and **Creation and Completion notifications.** The **Task information** tab displays basic task information.

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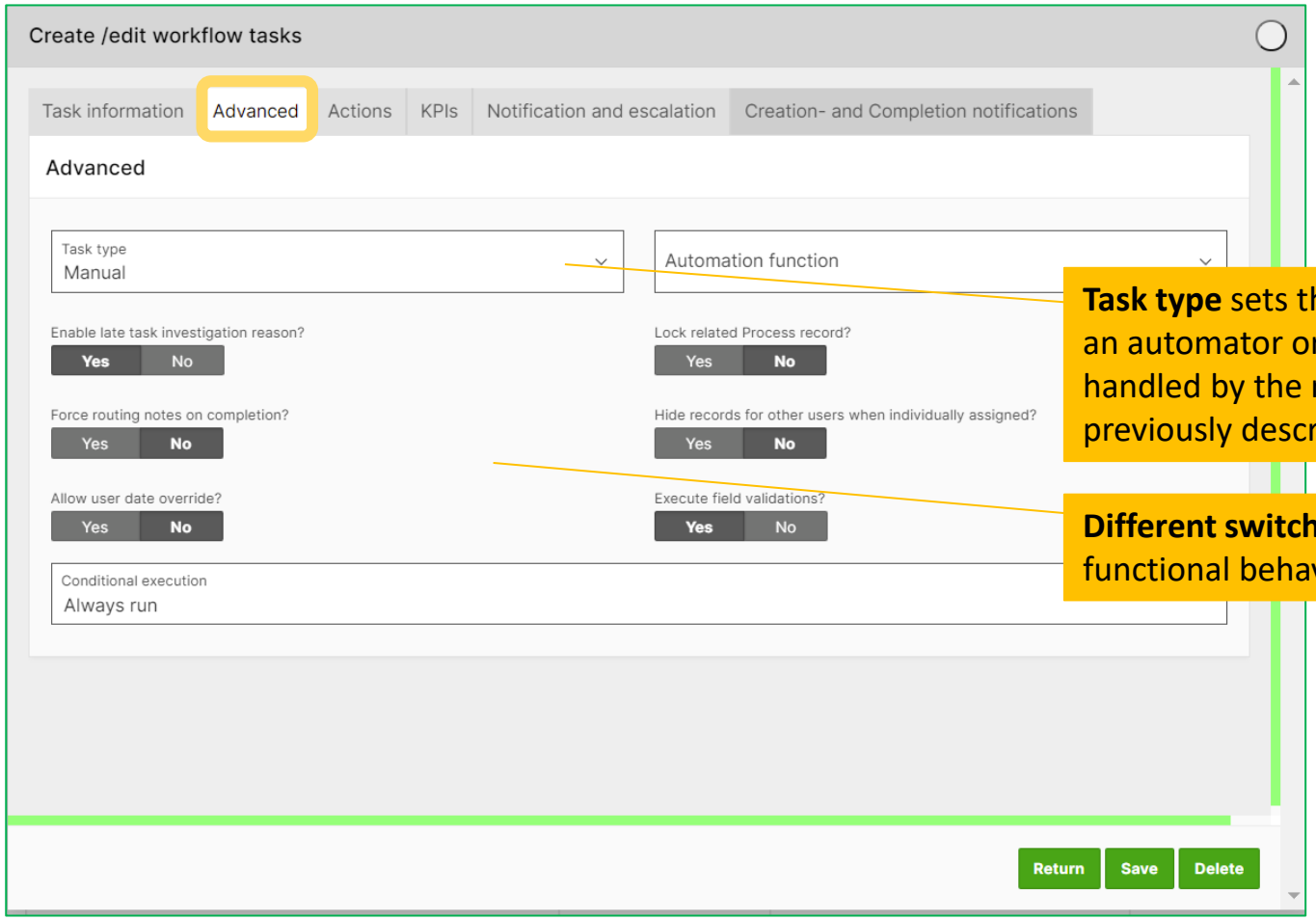
# Viewing / Editing Workflows tasks in HALOPV




**Task type** sets the task up to either be an automator or manual task (to be handled by the role that is selected on previously described tab)

**Different switches** that toggle functional behavior of the task

Clicking on the **Advanced** tab displays the Task type, the automation function linked to the task and also settings for late task reasoning, related process records, routing, records visibility, data override, field validations and execution conditions.

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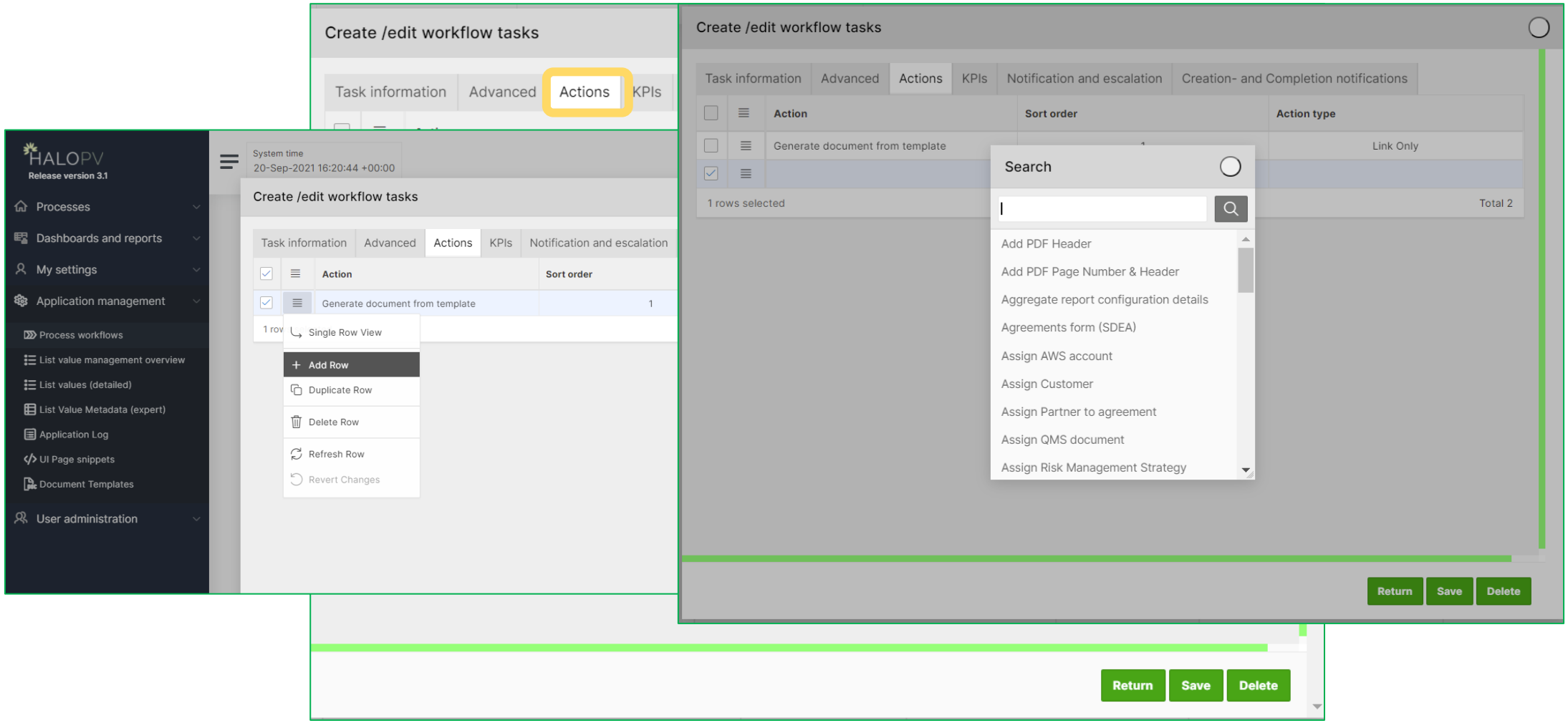
# Viewing / Editing Workflows tasks in HALOPV




Clicking on the **Actions** tab displays the associated action and allows user to delete or add action(s).
The user can left click on the ≡ icon and that provides user ability to add a row and then search for an action to add for the selected task.

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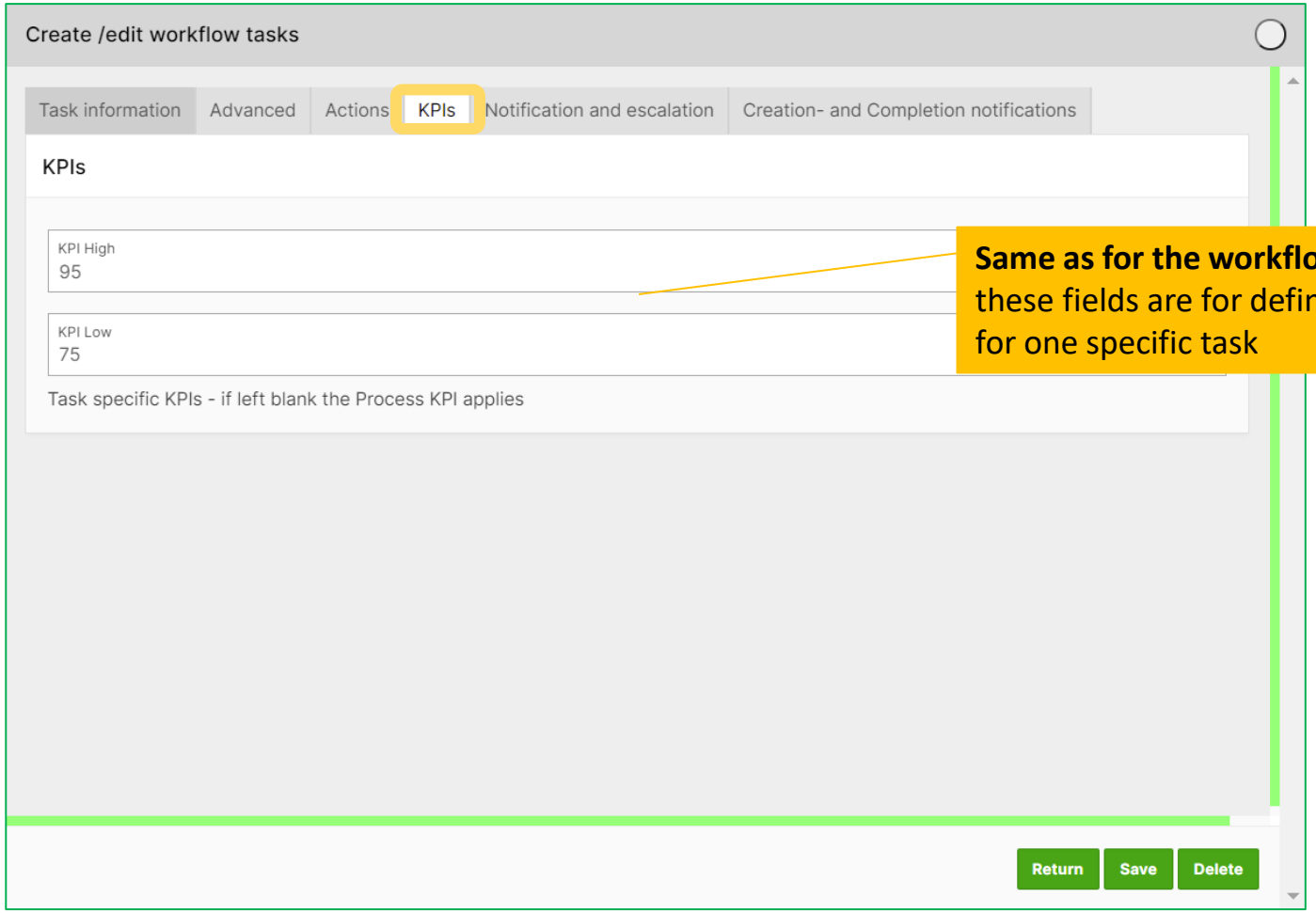
# Viewing / Editing Workflows tasks in HALOPV




**Same as for the workflow level KPIs** but these fields are for defining specifically for one specific task

Clicking on the **KPIs** tab displays the KPI high and low values that can be edited as desired.

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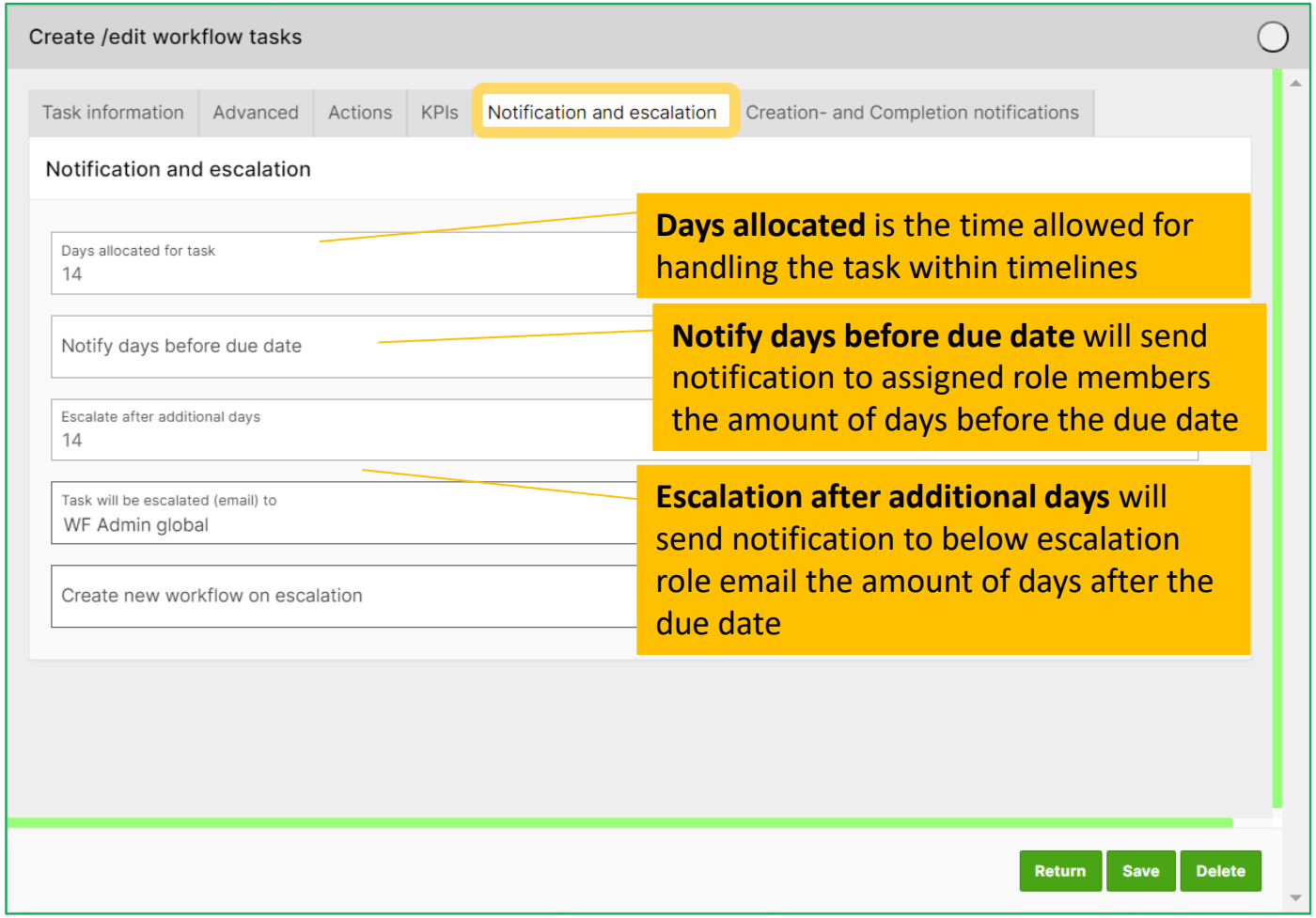
# Viewing / Editing Workflows tasks in HALOPV




**Days allocated** is the time allowed for handling the task within timelines

**Notify days before due date** will send notification to assigned role members the amount of days before the due date

**Escalation after additional days** will send notification to below escalation role email the amount of days after the due date

Clicking on the **Notification and escalation** tab displays the allocated days for the task, days before due date, escalations days, escalation person / group and workflows on escalation and can be edited as desired.

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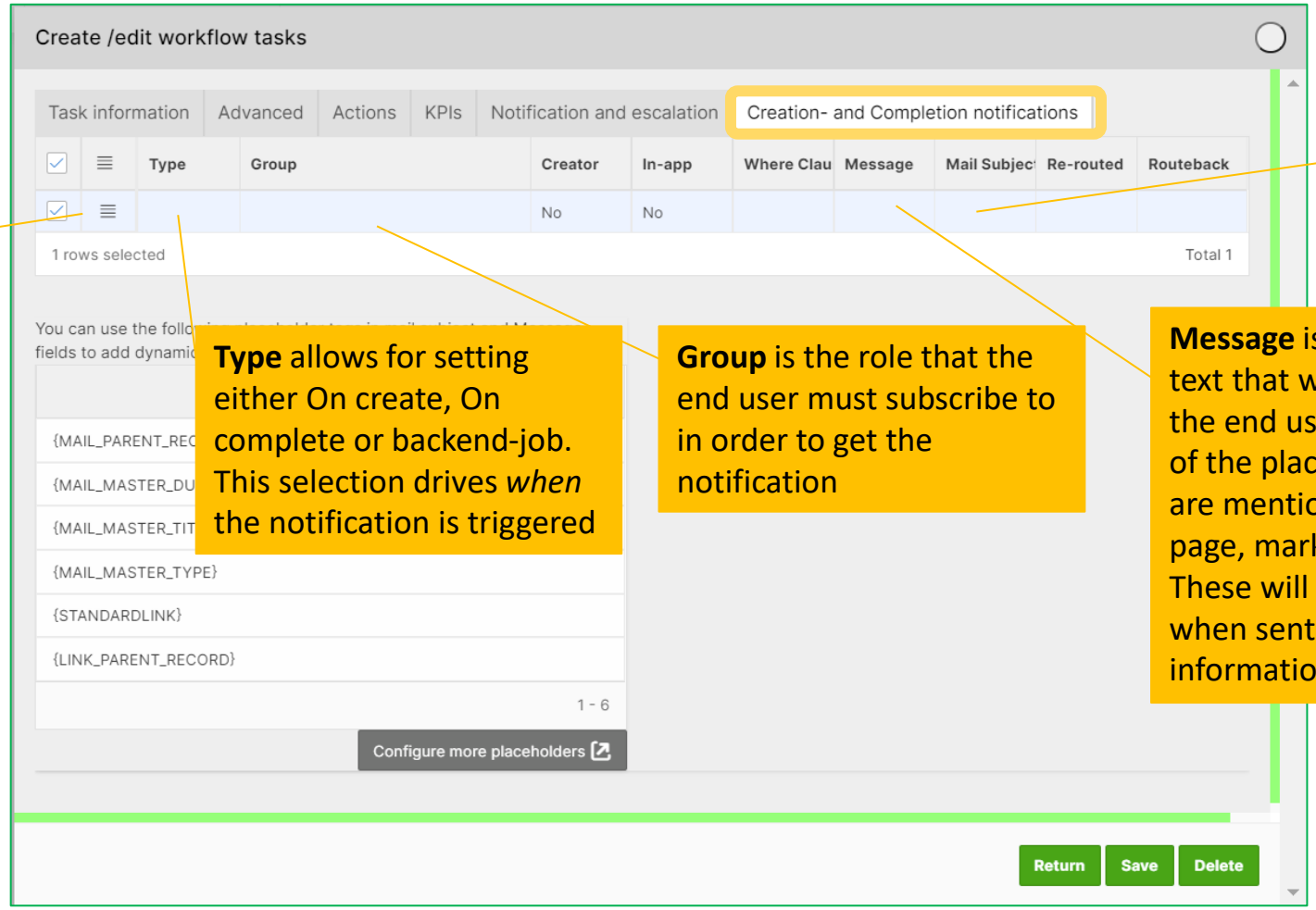
# Viewing / Editing Workflows tasks in HALOPV




**Add row** as many notification rows as you need to have different notification rules

**Type** allows for setting either On create, On complete or backend-job. This selection drives *when* the notification is triggered

**Group** is the role that the end user must subscribe to in order to get the notification

**Subject** is the message subject header

**Message** is the message text that will be received by the end user. Consider use of the placeholder tags that are mentioned on the page, marked with {}. These will be substituted when sent out with record information

Clicking on the **Creation and Completion notifications** tab displays the type of the task and associated person / group, placeholder tags in the mail and can be edited as desired.

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