



# Application Management

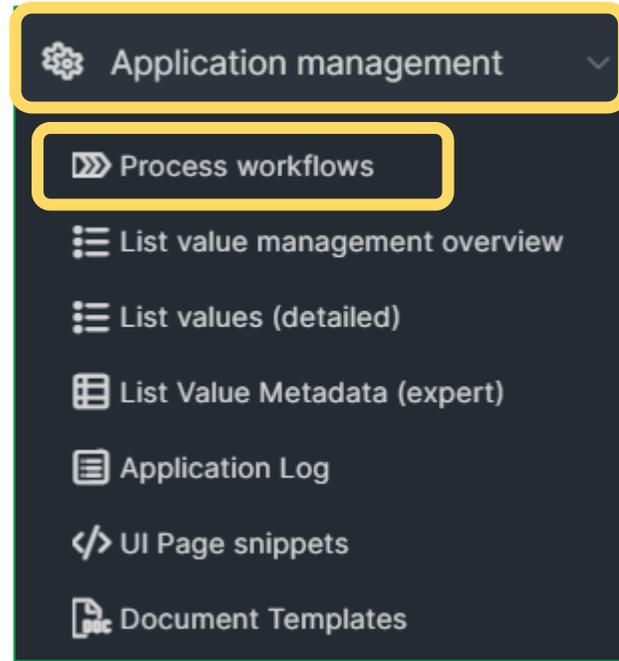
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How Application Management works  
for Process workflows

 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.

# How to review Workflows in HALOPV

The screenshot displays the HALOPV interface. On the left sidebar, the 'Process workflows' option is highlighted with a yellow box. The main content area is titled 'Workflows' and features a search bar, a 'Go' button, and an 'Actions' dropdown menu. Below these are buttons for 'Create', 'Audit Log', and 'Use case overview'. The central part of the page is a table listing various workflows.

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**.

# Viewing / Editing Workflows in HALOPV

The screenshot displays the 'Create / edit workflow' window in HALOPV. The interface is divided into a left sidebar and a main content area. The sidebar lists various workflow titles, with 'Aggregate reporting process' highlighted in yellow. The main content area shows the 'Record information' tab selected, with other tabs 'Process KPIs', 'Advanced settings', and 'Attributes' also visible. The 'Record information' tab contains several input fields: 'Workflow title' (Aggregate reporting process), 'Workflow owner' (WF Admin global), 'Associated core process' (Aggregate Reporting Module), 'Default Parent Label', 'Default Child Label', 'Record title label', 'Record prefix (10 CH max)' (AGG\_RPT), 'Default parent workflow', 'Default child workflow', and 'Icon'. A 'Default details form' field is also present. At the bottom, there are buttons for 'Close', 'Delete', 'Copy', 'Save', and 'Edit tasks'.

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**.

# Viewing / Editing Workflows in HALOPV

The screenshot shows the 'Create / edit workflow' interface in HALOPV. The left sidebar contains a navigation menu with 'Aggregate reporting process' highlighted. The main content area is divided into tabs: 'Record information', 'Process KPIs', 'Advanced settings', and 'Attributes'. The 'Record information' tab is active, showing fields for 'Workflow title' (Aggregate reporting process), 'Workflow owner' (WF Admin global), 'Associated core process' (Aggregate Reporting Module), 'Record title label', 'Record prefix (10 CH max)' (AGG\_RPT), 'Default parent workflow', 'Default Parent Label', 'Default Child Label', 'Default details form', and 'Description'. A 'Workflow enabled?' toggle is set to 'Yes'. At the bottom, there are 'Close', 'Delete', 'Copy', 'Save', and 'Edit tasks' buttons.

**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.

# Viewing / Editing Workflows in HALOPV

The screenshot shows a web interface for creating or editing a workflow. The title bar reads 'Create / edit workflow'. Below the title bar are four tabs: 'Record information', 'Process KPIs', 'Advanced settings', and 'Attributes'. The 'Process KPIs' tab is selected and highlighted with a yellow box. Under this tab, there are two input fields: 'Process KPI HIGH' with the value '100' and 'Process KPI LOW' with the value '95'. Two yellow callout boxes provide explanations for these values. The 'Process KPI HIGH' callout states: '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'. The 'Process KPI LOW' callout states: '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'. At the bottom of the interface, there are buttons for 'Close', 'Delete', 'Copy', 'Save', and 'Edit tasks'.

**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.

# Viewing / Editing Workflows in HALOPV

Create / edit workflow

Record information | Process KPIs | **Advanced settings** | Attributes

**Record locking**

Lock on Completion  
 Yes  No

**Creation of new records**

Role required to create records  
QPPV Office

Record create buttons  
Both

Copy office documents to working folder when initiating workflow  
 Yes  No

**Fields**

Include product / compound  Yes  No

Include territory  Yes  No

Include Study  Yes  No

Include Organizational entity  Yes  No

Include Reporting destination  Yes  No

Include Assigned to  Yes  No

Include Type  Yes  No

Include Due by

OBS: To hide fields on child forms, use the code list Fields configuration (Show/Hide)

**Tabs**

Record information  Yes  No

Related records  Yes  No

Workflow history  Yes  No

Close Delete Copy Save Edit tasks

**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.

# Viewing / Editing Workflows in HALOPV

The screenshot shows a web interface titled "Create / edit workflow". At the top, there are four tabs: "Record information", "Process KPIs", "Advanced setting", and "Attributes". The "Attributes" tab is highlighted with a yellow border. Below the tabs, there are two input fields: "Workflow id" with the value "141" and "Process Number" with the value "5". The main area of the interface is a large, empty grey rectangle. At the bottom, there are several buttons: "Close", "Delete", "Copy", "Save", and "Edit tasks".

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

# Viewing / Editing Workflows tasks in HALOPV

Create / edit workflow tasks

Record information

Workflow id  
141

Search:  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.

# Viewing / Editing Workflows tasks in HALOPV

The screenshot displays the 'Workflow tasks' interface. On the left, a table lists tasks with columns for Task identifier, Wf task sortorder, Workflow, Task name, Days allocated for task, and Days over before esca. The task with ID 422 is highlighted with a pencil icon. On the right, the 'Create /edit workflow tasks' window is open, showing the 'Task information' tab. This tab includes a 'Task information' section with 'Disabled' options (Yes/No), a 'Task sort order' dropdown, and a 'Task title' field. Below this is a 'Task Description' field and a 'Task will be assigned to group' field. At the bottom of the window are 'Return', 'Save', and 'Delete' buttons.

Task identifier	Wf task sortorder	Workflow	Task name	Days allocated for task	Days over before 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	

**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.

# Viewing / Editing Workflows tasks in HALOPV

Create /edit workflow tasks

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

Advanced

Task type: Manual Automation function

Enable late task investigation reason?  Yes  No

Lock related Process record?  Yes  No

Force routing notes on completion?  Yes  No

Hide records for other users when individually assigned?  Yes  No

Allow user date override?  Yes  No

Execute field validations?  Yes  No

Conditional execution: Always run

Return Save Delete

**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.

# Viewing / Editing Workflows tasks in HALOPV

The screenshot displays the HALOPV interface for managing workflow tasks. On the left is a dark sidebar with navigation options: Processes, Dashboards and reports, My settings, Application management, Process workflows, List value management overview, List values (detailed), List Value Metadata (expert), Application Log, UI Page snippets, Document Templates, and User administration. The main content area is titled 'Create /edit workflow tasks' and includes a system time indicator (20-Sep-2021 16:20:44 +00:00). The 'Actions' tab is highlighted in yellow. Below the tabs is a table with columns for 'Action', 'Sort order', and 'Action type'. One row is selected, showing 'Generate document from template' with a sort order of 1. A context menu is open over this row, offering options: Single Row View, Add Row, Duplicate Row, Delete Row, Refresh Row, and Revert Changes. A search dropdown is also open, listing various actions such as 'Add PDF Header', 'Assign AWS account', and 'Assign Risk Management Strategy'. At the bottom right, there are 'Return', 'Save', and 'Delete' buttons.

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.

# Viewing / Editing Workflows tasks in HALOPV

Create /edit workflow tasks

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

KPIs

KPI High  
95

KPI Low  
75

Task specific KPIs - if left blank the Process KPI applies

Return Save Delete

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.

# Viewing / Editing Workflows tasks in HALOPV

Create /edit workflow tasks

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

Notification and escalation

Days allocated for task  
14

Notify days before due date

Escalate after additional days  
14

Task will be escalated (email) to  
WF Admin global

Create new workflow on escalation

Return Save Delete

**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.

# Viewing / Editing Workflows tasks in HALOPV

Create /edit workflow tasks

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

<input checked="" type="checkbox"/>	Type	Group	Creator	In-app	Where Clau	Message	Mail Subjec	Re-routed	Routeback
<input checked="" type="checkbox"/>			No	No					

1 rows selected Total 1

You can use the following fields to add dynamic content to your message:

- {MAIL\_PARENT\_REC}
- {MAIL\_MASTER\_DU}
- {MAIL\_MASTER\_TIT}
- {MAIL\_MASTER\_TYPE}
- {STANDARDLINK}
- {LINK\_PARENT\_RECORD}

1 - 6

[Configure more placeholders](#)

**Return** **Save** **Delete**

**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

**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

**Subject** is the message subject header

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.