



# Workflow Configuration & Roles

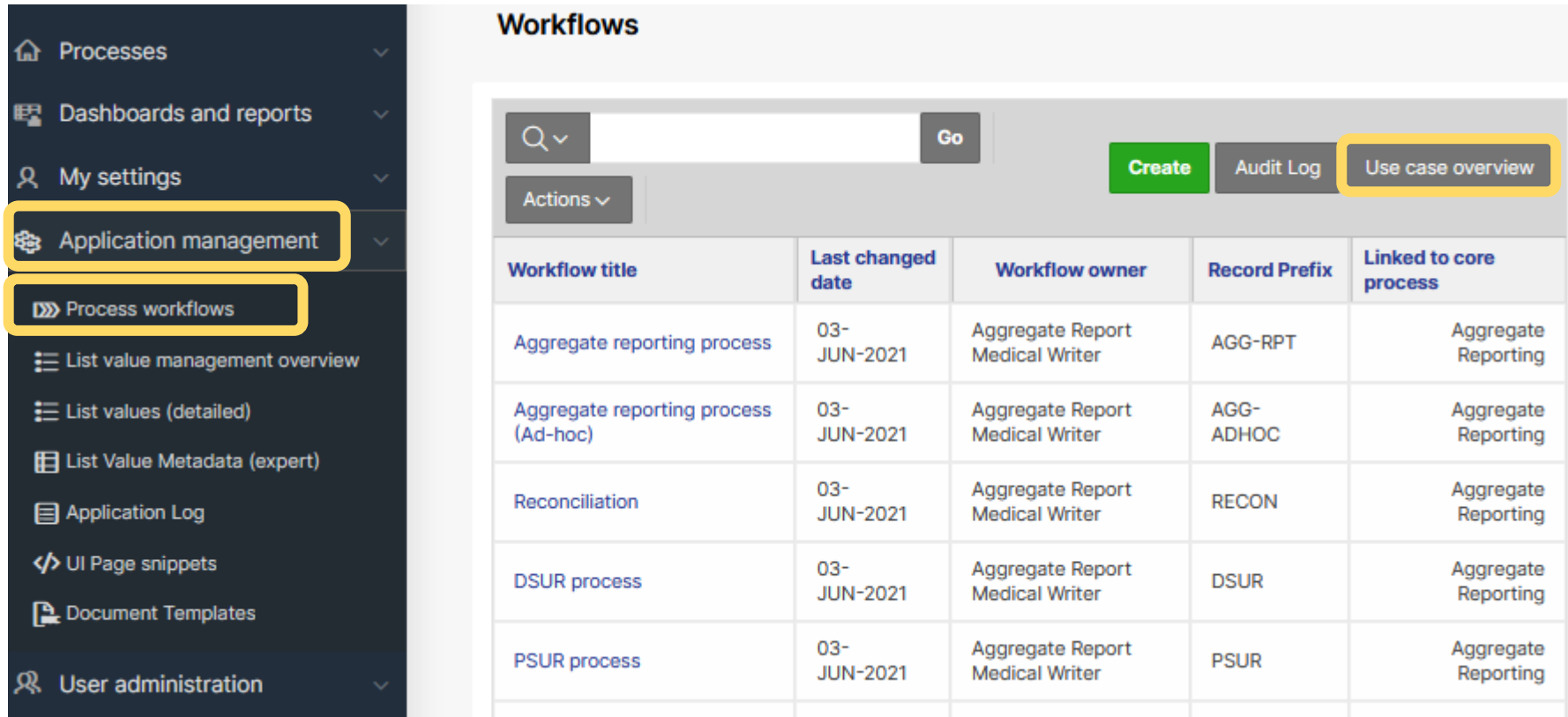
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Reviewing Workflow configuration  
and Roles

 HALOPV 3.0

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# How to review workflow configuration in HALOPV



The screenshot displays the HALOPV interface. On the left is a dark sidebar with navigation options: Processes, Dashboards and reports, My settings, Application management (highlighted with a yellow box), Process workflows (highlighted with a yellow box), 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 'Workflows' and features a search bar, a 'Go' button, and three action buttons: 'Create' (green), 'Audit Log', and 'Use case overview' (highlighted with a yellow box). Below the search bar is an 'Actions' dropdown menu. A table lists the following workflows:

Workflow title	Last changed date	Workflow owner	Record Prefix	Linked to core process
Aggregate reporting process	03-JUN-2021	Aggregate Report Medical Writer	AGG-RPT	Aggregate Reporting
Aggregate reporting process (Ad-hoc)	03-JUN-2021	Aggregate Report Medical Writer	AGG-ADHOC	Aggregate Reporting
Reconciliation	03-JUN-2021	Aggregate Report Medical Writer	RECON	Aggregate Reporting
DSUR process	03-JUN-2021	Aggregate Report Medical Writer	DSUR	Aggregate Reporting
PSUR process	03-JUN-2021	Aggregate Report Medical Writer	PSUR	Aggregate Reporting

In the **Application management > Process workflow**, the user can find all available workflows in the system. Click on **Use case overview** to access the list of workflows configured for the different HALOPV modules.

# How to review workflow configuration in HALOPV

HALO Public reports

Workflow overview

Full-text search 1. Primary Report

Actions

Workflow Id	Associated Core Process	Workflow Enabled?	Workflow Title	Record Title
141	Aggregate Reporting	Yes	Aggregate reporting process	-
2089	Aggregate Reporting	Yes	PSUR process	-

Workflow overview - Tasks

Full-text search Actions

Wf Id	Workflow	Task	Description	Assignee	Type	Action List	Lock Record	Days Allocated	Es
622	Perform Access Granting Training	2. Implement new access	Automator that sets new roles to individual as per curriculum	Generic role	Automatic (Automatically grants access to role upon completion of a Access granting training record)	-	Yes	1 days	-
622	Perform Access Granting Training	1. Perform Access Granting Training	Perform the training and sign electronically. Access will then	Generic role	Manual (Handled by group or individual)	Training link (Link - show in complete), Electronic signature	-	14 days	-

Workflow overview - Notifications

Full-text search Actions

Assignee	Type	Workflow Task	User Group	Filter	Notify In App?	Message	Subject	Rerouted
-	On creation	Agreements > Agreements	Entity approval	-	-	Hi there, this is a new task for you. You need to go into HALO and approve with signature, (STANDARDLINK)	New Entity for approval	-

Use case overview offers 3 types of reports:

**Workflow overview:** Gives you an overview of the workflows available for each module

**Workflow overview - Tasks:** This shows the details of the configuration for each workflow

**Workflow overview - Notifications:** Shows how notifications were set up; which roles will receive the notification, message, title, and days allocated per step.

# How to review roles in HALOPV

Click on the column **Workflow** and search for a specific workflow.

Workflow overview - Tasks

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Wf Id	Workflow	Task	Description	Assignee	Type	Action List	Lock Record	Days Allocated	Escalate To	Escalate After	Kpi High	Kpi Low	Associated Core Process
1922	Document intake	3. Assign workflow based on keywords	Automator assesses document keywords and dispatches to correct workflow	Automations									Records Management
2048	ICSR Submission (Korea)	4. Enter Submission details	Fill in the Submission details form available in the Task activities section	ICSR Submission									Submission Module
2049	Aggregate Submission (Manual)	1. Setup / verify Submission record	-	ICSR Submission									Submission Module

Workflow search dropdown menu:

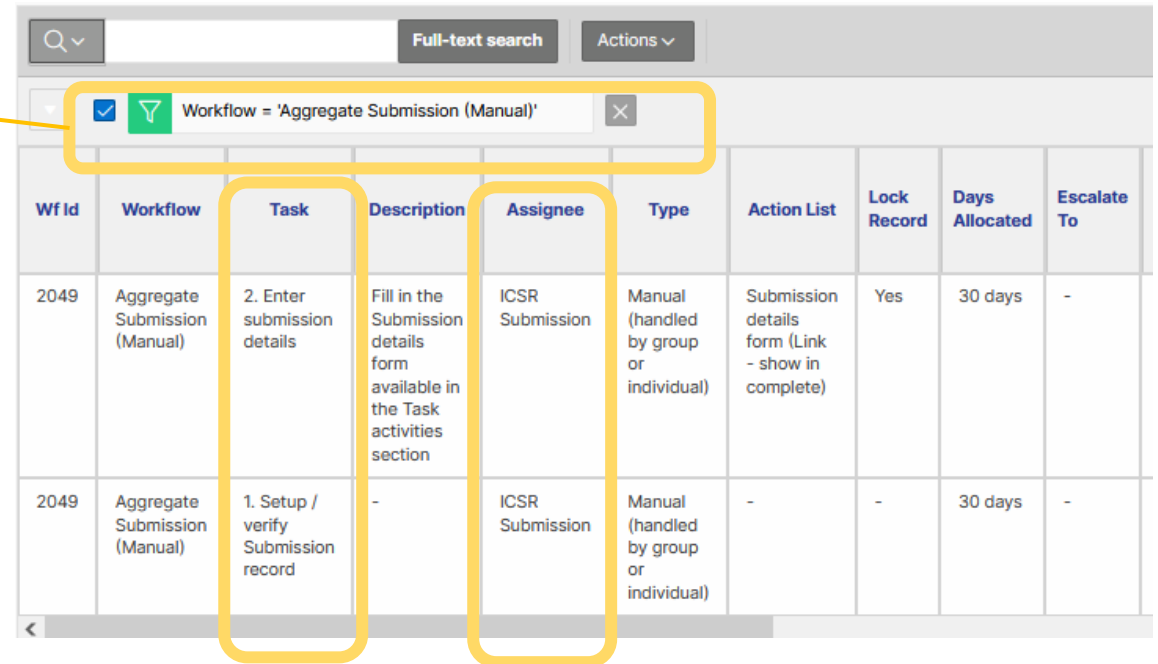
- Filter...
- AWS account
- Access management
- Aggregate Submission (Manual)
- Aggregate reporting process
- Aggregate reporting process (...)

# How to review roles in HALOPV

The top of the report will show your selected **Workflow**. E.g. in this example we have 2 steps.

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- **Task:** Shows the number of steps in the workflow.
- **Assignee:** Shows the role required to perform the **Task activities** in the shown step.
- **Action List:** Shows the number of **Task activities** the assigned role will need to perform in the shown step.
- **Days allocated:** Shows the number of days allocated to complete the **Task activities** in the shown step.



Wf id	Workflow	Task	Description	Assignee	Type	Action List	Lock Record	Days Allocated	Escalate To
2049	Aggregate Submission (Manual)	2. Enter submission details	Fill in the Submission details form available in the Task activities section	ICSR Submission	Manual (handled by group or individual)	Submission details form (Link - show in complete)	Yes	30 days	-
2049	Aggregate Submission (Manual)	1. Setup / verify Submission record	-	ICSR Submission	Manual (handled by group or individual)	-	-	30 days	-

**Note:** Only users with the **User Admin** role can assign roles to users.