



HALO User Guide

Guiding Slides on How Create Users
in HALO

 HALO PV 3.0

 insife

How to create users in HALOPV

In the **User Administration** area under the section **Users**, the user can access all available users and create new users.

User list

Include Deleted Users

1

Search Go Actions Audit log Review report

	Unique user ID	User Login	Full name	Last updated	User organization	User Locked	User Type	Deleted
	3822	ADMIN	Builtin admin	09-MAY-2021	Root organization	No	Normal user account	No

Click on **Create** to continue.

Note: The user should have **User Admin** role to perform this action

How to create users in HALOPV

User information

User login details | Contact details | Notifications & Workflow

User login
TESTUSER

Date created

Password

(Mandatory for initial creation. When saving an existing user, use this field to update the user password)

Full name
Mr. Tester

Organizational Entity
Root organization

User type
Normal user account

Delete user?
 Yes No
Removes the user from all lists except historic records (Audit trails etc.).

Lock user?
 Yes No
Prevents the user from logging into the system

Enforce secure mail?
 Yes No
If set to No, users cannot receive reports in Emails - instead the user receives a link to HALO

Cancel **Create**

2

Fill in the available fields in the form

Click on **Create** to continue.

3

Note: The user should have **User Admin** role to perform this action

How to create users in HALOPV

Add additional information and enable notifications (optional)

If marked as **Yes**, the user will receive notifications if the email address is added in the **Contact Details** tab.
Note: The user requires the group role in order to receive notifications for the configured workflow.

4 Please click on **Save** before moving to the next tab

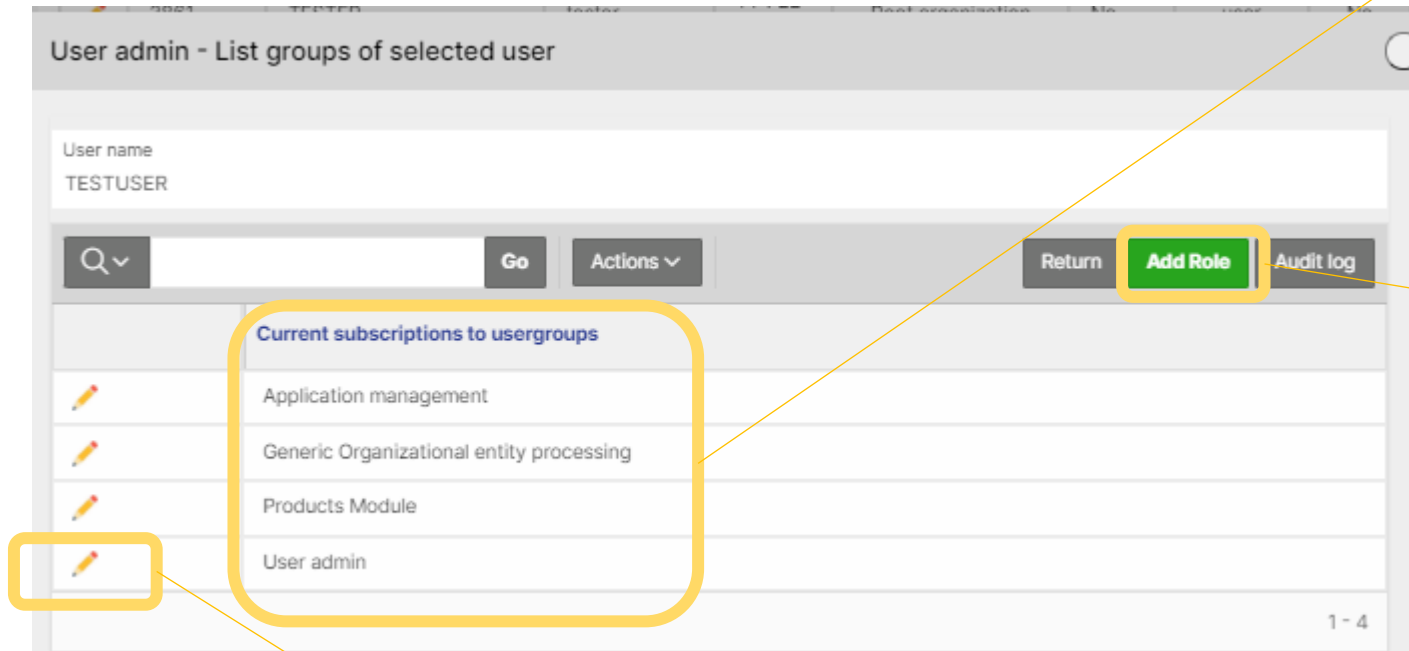
How to assign roles to users in HALOPV

The screenshot shows a user management interface with a header 'User information' and three tabs: 'User login details', 'Contact details', and 'Notifications & Workflow'. Under the 'Notifications & Workflow' tab, there are two sections: 'Email notifications' with 'Yes' and 'No' buttons, and 'Enable notes on task completion' with 'Yes' and 'No' buttons. At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Setup roles'. The 'Setup roles' button is highlighted with a yellow border.

Assign roles to the new user by clicking on **Setup roles**.

5

How to assign roles to users in HALOPV



This area displayed existing roles assigned to the user

6

Assign roles to the new user by clicking on **Setup roles**.

The icon pencil allows you to remove or update the role subscription e.g., Read-only access

Note: The user should have **User Admin** role to perform this action

How to assign roles to users in HALOPV

User admin - edit / add group subscription

User name
TESTUSER

Usergroup to subscribe to

Read only

Return Setup subscription

7

Click on the icon to select a new role. Pick a role from the list or search for it in the search box and click on **Setup subscription**

Assign roles to the new user by clicking on **Setup roles**.

Search

Aggregate Report Approval

Aggregate Report Medical Writer

Aggregate Report Reviewer

Aggregate Reporting Module

Application management

Automations

Blinding flag edit

Central Business configuration team

Central ICSR management

Search

Dasht

Aggregate Report Approval

Aggregate Report Medical Writer

Note: The user should have **User Admin** role to perform this action

How to update subscription to roles in HALOPV

The image shows two screenshots from the HALOPV system. The left screenshot displays a list of 'Current subscriptions to usergroup' for the user 'TESTUSER'. The list includes 'Aggregate Reporting Module', 'Application management', 'Dashboard', 'Generic Organizational entity proce', 'Products Module', and 'User admin'. Each item has a pencil icon to its left. The 'Dashboard' row and its pencil icon are highlighted with yellow boxes. The right screenshot is titled 'User admin - edit / add group subscription'. It shows a form with 'User name' set to 'TESTUSER' and 'Usergroup to subscribe to' set to 'Dashboard'. There is a 'Read only' checkbox which is currently unchecked. At the bottom, there are three buttons: 'Return', 'Remove subscription', and 'Update subscription'.

The new role will show on the **current subscription to user group area**

The icon pencil allows you to remove or update the role subscription. When clicking on the icon, a new window will display the option to **Remove subscription** or to **Update subscription**.

Note: Read-only subscription allows the user to review the workflow step, but the user will not be able to perform any tasks or complete the workflow or receive notifications. To change a role to **Read-only**, untick the read-only box and click on **Update subscription**.

Deleted Users

If a user has been deleted and you want to recover the account, go to the process **User**, and click on **Include Deleted Users**. Click on the column header **Deleted = yes** and look for the user. Click on the icon pencil to open the user information

Please note that HALO will not allow you to create a new user with same **User Login**

The screenshot shows the 'User list' interface. On the left is a navigation menu with items: Processes, Dashboards and reports, My settings, Application management, User administration, Users, and User roles. The main area displays a table of users. At the top right of the table area, there is a checkbox labeled 'Include Deleted Users' which is checked. Below the table, there are buttons for 'Create', 'Audit log', and 'Review report'. The table has columns: Unique user ID, User Login, Full name, Last updated, User organization, User Locked, User Type, and Deleted. The 'Deleted' column has a dropdown menu with 'Yes' and 'No' options. A yellow box highlights the 'Include Deleted Users' checkbox. Another yellow box highlights the 'Yes' option in the 'Deleted' column dropdown for the user with ID 841. A third yellow box highlights the pencil icon in the 'Unique user ID' column for the same user.

Unique user ID	User Login	Full name	Last updated	User organization	User Locked	User Type	Deleted
3822	ADMIN	Builtin admin	09-MAY-2021	Root organization			
841	MARTIN.HOLM-PETERSEN@INSIFE.COM	Martin Holm-Petersen	12-MAY-2021	Root organization			Yes
3842	PETER.STROYER.PALLESEN@INSIFE.COM	Peter Stroyer Pallesen	05-AUG-2021	Root organization			No

Deleted Users

Update user information as needed and then select **Delete user? = No** and then click on **Save**

User login details | Contact details | Notifications & Workflow

User login: MRDOCUMENT

Date created: 24-MAR-2021

Password: (Mandatory for initial creation. When saving an existing user, use this field to update the user password)

Update on save?
 Yes
 No

Full name: Mr. Document

Organizational Entity: Insife Germany

User type: Normal user account

Delete user?

Lock user?

Enforce secure mail?

Cancel |