



Guiding Slides on **HALO**PV

Application Management & User Administration





Application Management & User Administration

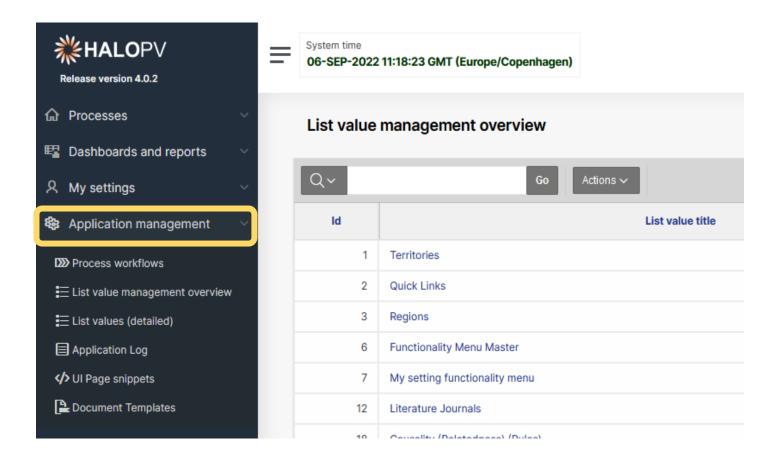
- Application Management
 - Process Workflow
 - List of values
 - Application Log
- User Administration
 - Users
 - Create Users
 - Update password
 - User Roles
 - Type of roles
 - Create a role



Application Management process

The configuration of HALO functionalities, processes, and lists of values are available in the Application Management menu. It is required that a user has the **Application management** role in order to see and access the menu item.

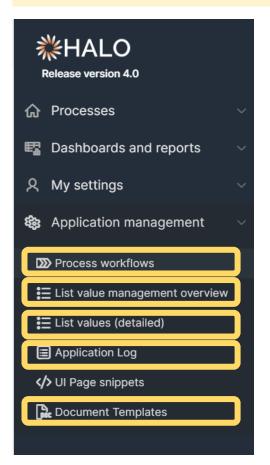
To review the Application Management menu more thoroughly, please check Admin Manual: Application Management and User Administration.





Application Management Process

In the **Application Management** process, the user should be able to do the following:



- Process workflows includes the list of process workflows available in the modules. In this section, the user can update/configure; workflows, task actions, days allocated per step, notifications. To review Process Workflows configuration more thoroughly, please check Admin Manual: Application Management and User Administration.
- The **List value management overview** is the overall available List values configured in the forms.
- The **List values (Detailed)** menu allows users to update, e.g., Master types list, Tags, Validation rules, Task actions, etc.
- The **Application Log** is a useful tool for administrators. It allows for the viewing of several types of logs that are produced as HALO is being used
- Document Templates allow users to update WORD templates available for the different process workflows. These templates render data from HALOPV into a Word or PDF document when using e.g. Generate document from templates. To know how to update or create templates review User Guide How to set up HALOPV Templates.

Note: The user should have **Application Management** role to perform this action. Some list of values might be restricted to HALO technical team.

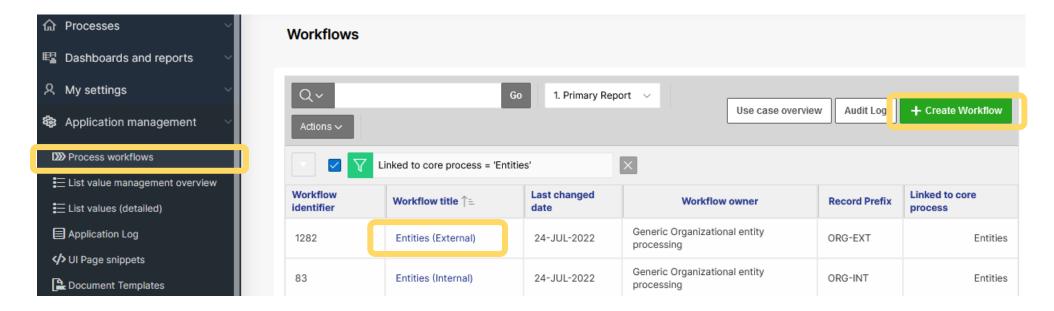


Process Workflows

All processes available in HALO are configurable and managed in the Application Management section.

The Core Process (Modules) workflows and steps configuration are available in the Process Workflows. In the example below, the core process, Entities,' shows two workflows; Entities (External) and Entities (Internal) – Including Workflow owner, Record Prefix and Linked to Core Process.

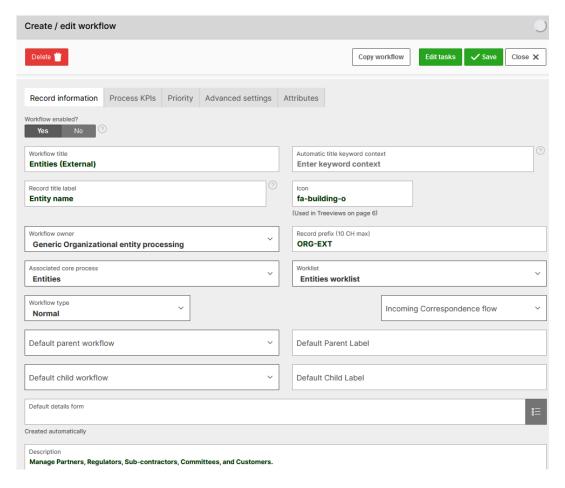
Click on the **Workflow title** of the process workflow to enter the editing page or click the **Create Workflow** button to configure a new workflow.





Process Workflows - Create/Edit Workflow

Record Information tab allows to define title, Module, parent and/or child workflow



- Workflow Enabled? It will show the workflow in a process/module (No will hide it from the main application part, i.e. may be appropriate while initially setting up the workflow and/or underpinning tasks).
- The **Workflow Title** corresponds to the title displayed in the application.
- **Record title label** is used to rename the title's name in the list of records (as shown below.)
- Workflow owner defines who can administer the workflow
- Record prefix will allow up to 10 characters and is used to define unique identifiers in lists of records in the main application, e.g., Product Licenses = "PROD-LIC".
- The Associated core process is a drop-down of available core processes (or Modules), which will control where the configured workflow will be presented in the application (or Modules).
- The Default Parent workflow will select the workflow (located in the selected associated core process) that will appear as default when clicking the Parent record button or selecting parent action.

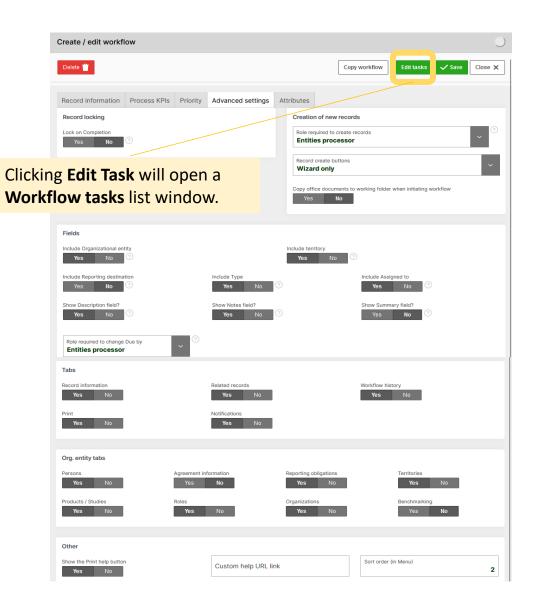


Process Workflows – Advanced Settings

Advanced settings tab

The advanced settings tab allows for configuring several flags for elements to be shown or hidden on the processing form or record view, including **Fields**, **Tabs**, and **Other**.

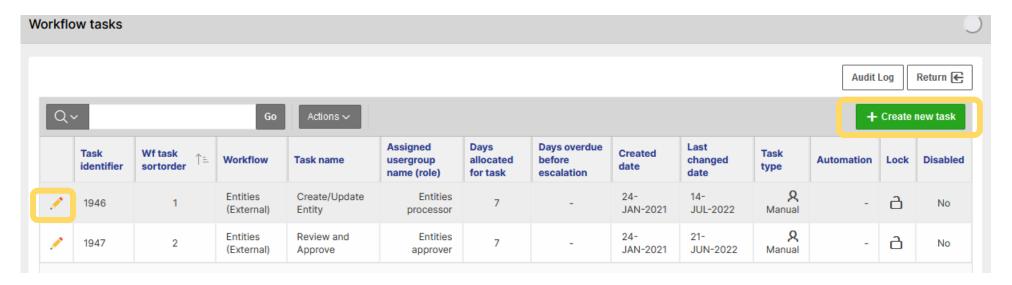
- Lock of Completion shows completed record as Read-only if select
 Yes. If set as No, the completed record can be updated after completion.
- Role required to create records defines the role that can create new records.
- Role required to change Due by defines the role that can update Workflow to be completed by in the record information.
- The Other section allows for setting a sort order, which is used for placing the process workflow in order with other listed workflows.
 E.g., Annex A.1, Annex A.2, Annex A.3, etc.



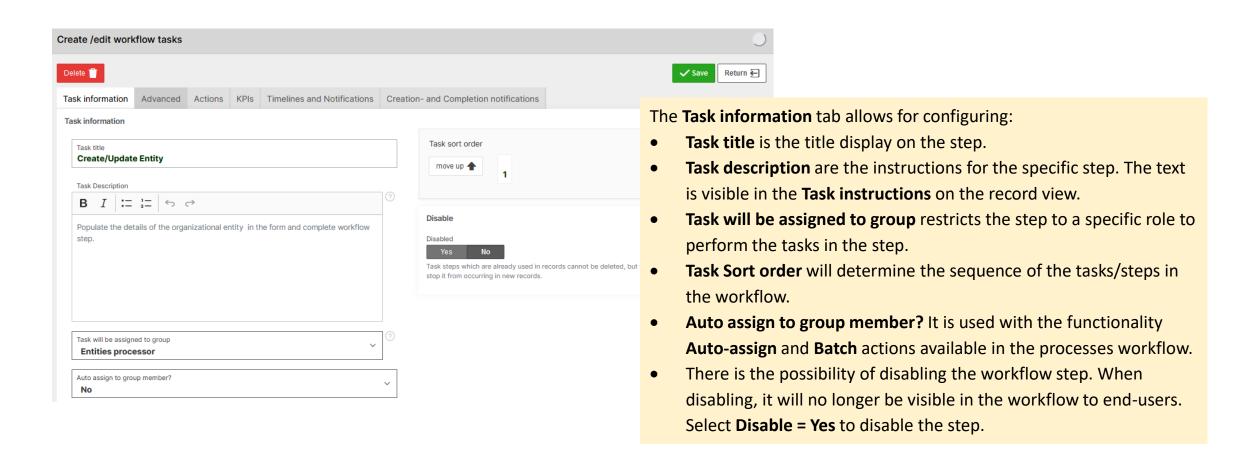


The list of tasks (steps) is sorted by **WF task sort order**, which significantly determines the main application's step execution order. The list also shows an overview of the task attributes, including locking the end-user for making changes in the task or whether it is a manual or an automatic step (a step that includes an Automator).

The **pencil icon** allows the user to enter the editing view of the step. Use the pencil icon to edit an existing step. If you want to create a new step, click **+ Create New Task**.

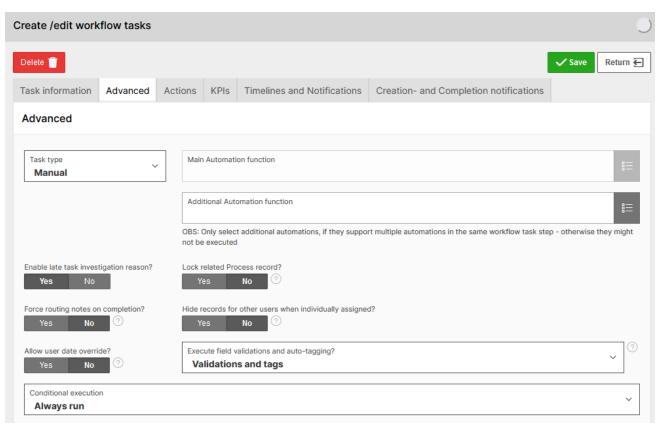








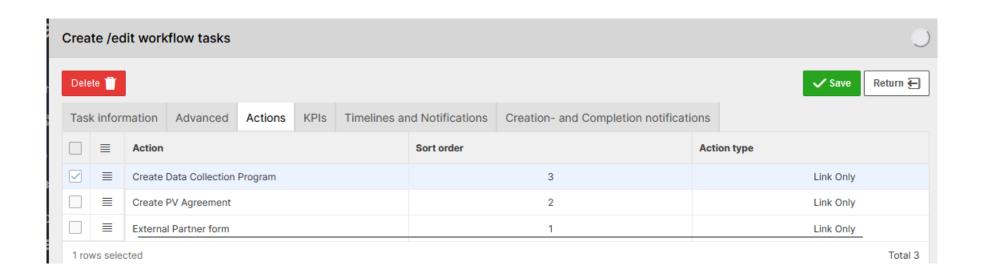
The **Advanced** tab includes the switches that will change the behavior of the step.



- The Task type is, by default, set to Manual, but an Automatic (function)
 together with an Automator can be selected instead. All Automators
 must be registered in the application back-end before they can be
 selected.
- Enable late task investigation reason? Users can add a reason if a step is completed after the due date.
- Force routing notes on completion? Enable mandatory notes. Users are asked to include a note when a step is routed.
- Lock related process record? If Yes, it will set the record into Read-only mode while in this task step. This function is mainly used on automatic (function) steps to protect from manual overruling while the Automator runs. E.g., if a user completes the step while the Automator is running, it might stop the back-end process.
- Hide records for other users when individually assigned? Will
 determine whether or not a process record assigned to a user will be
 visible to other users.
- Allow user date override? Will allow for a manual update of the task completion time 'Workflow to be completed by' (located in the record view.)



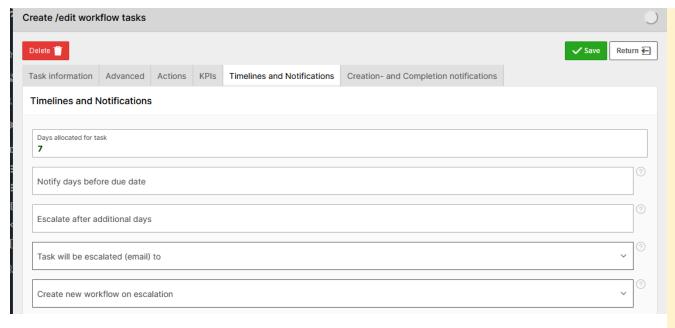
Actions tab - Each task (step) allows adding **task actions** as **Data forms** or as additional forms **Links / Other activities**. **Link (Show on complete)** will display the data form (task activity) after the step is completed, e.g., for record at rest / completed.





Timelines and Notifications tab

In this tab, various date allocations can be set up to measure timeliness against the actual completion date. Users with the role configured in the step will be alerted/notified based on the following:

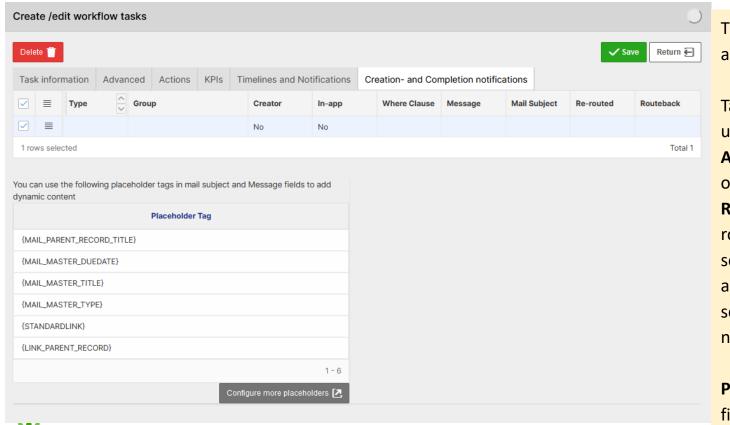


- Days allocated for task determines how many days the user has to complete the task(s) in that specific step.
- Notify before due date if notifications are enabled in the user's profile. A reminder is sent to the users with the configured role that a task is due soon. Due by tasks are also displayed on HALO user's task list.
- Escalate after additional days if a task is not completed on the given days. A role can be notified that users with the role in that step have not completed their tasks, including email escalation Task will be escalated (email) to and opening a new process record in another workflow, Create new workflow on escalation, e.g., a Non-conformity.



Creation- and Completion notifications - The notifications can be of different **Types**;

- On create when the workflow is initiated
- On complete when a step is completed or
- Back-end job it can be used together with 'where-clauses' for additional configuration. This option requires SQL.

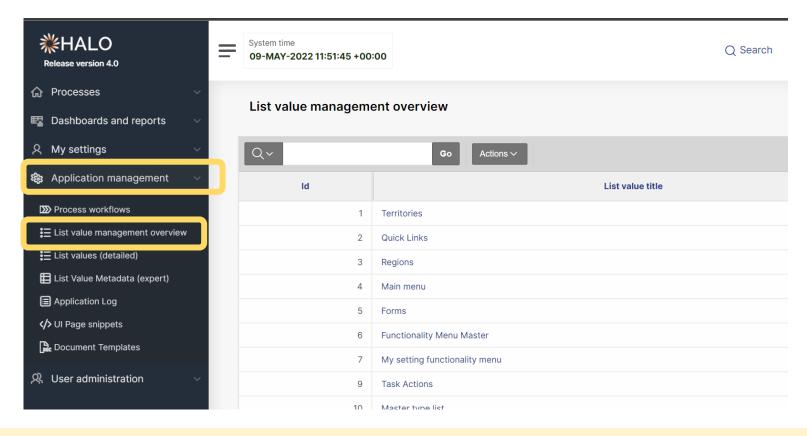


The notifications are configurable to include an arbitrary amount of roles using **Add Row.**

Tabbing through the notifications table will add a new row upon reaching the end of the row. Clicking on the Row Actions button to the left provides more options for cross-row operations, such as Delete, Add, Duplicate, Revert, and Refresh - including a custom Message and Subject for each role. Additionally, you can add a custom Where Clause only to send notifications when a certain data condition is fulfilled and options to notify the record Creator. The Re-route option sends the task to the previous step in the workflow and notifies the group (role.)

Plaholder tag can be included in **Mail subject** and **Message** fields to add dynamic content.

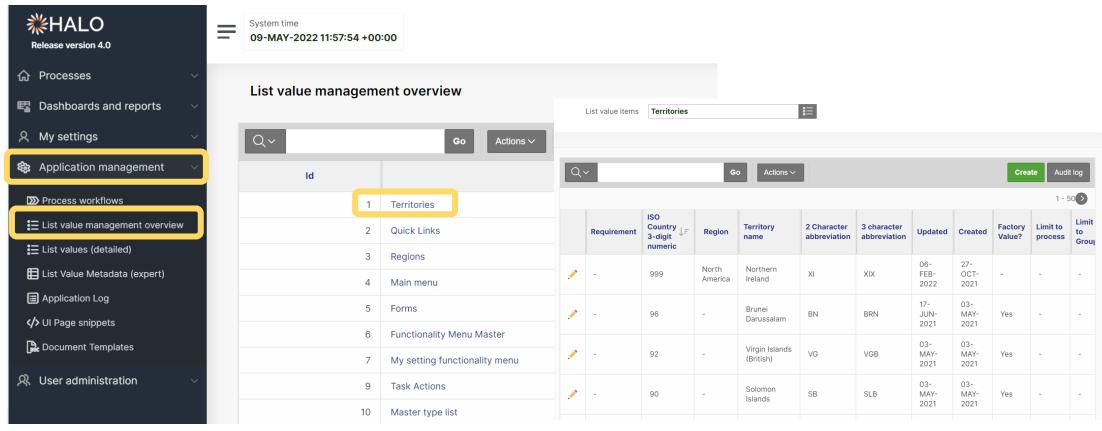
How to configure List Values



In the **Application management > List value management overview**, the user can find available list value elements in the system. Click on any list element to access the list of values configured for the specific list item. The index of List Values can be adapted to the agreed criticality level, i.e., some system configuration items can be hidden from certain types of administrators.

To review **List Values** more thoroughly, please check **Admin Manual: Application Management and User Administration.**

How to configure List Values

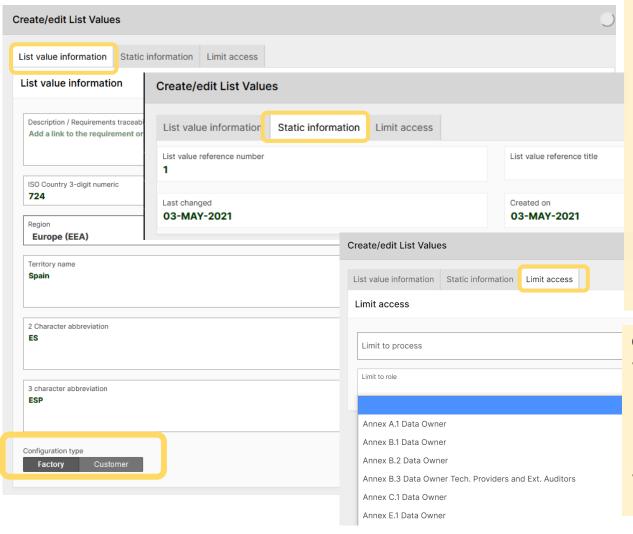


On clicking a **List value element,** the user can find all available list values configured in the system.

Click on the edit icon / to view / update / delete the list value.



Creating / Editing List Values



Clicking on the edit icon will open up the Create/edit List Values window that displays the details in 3 different tabs:

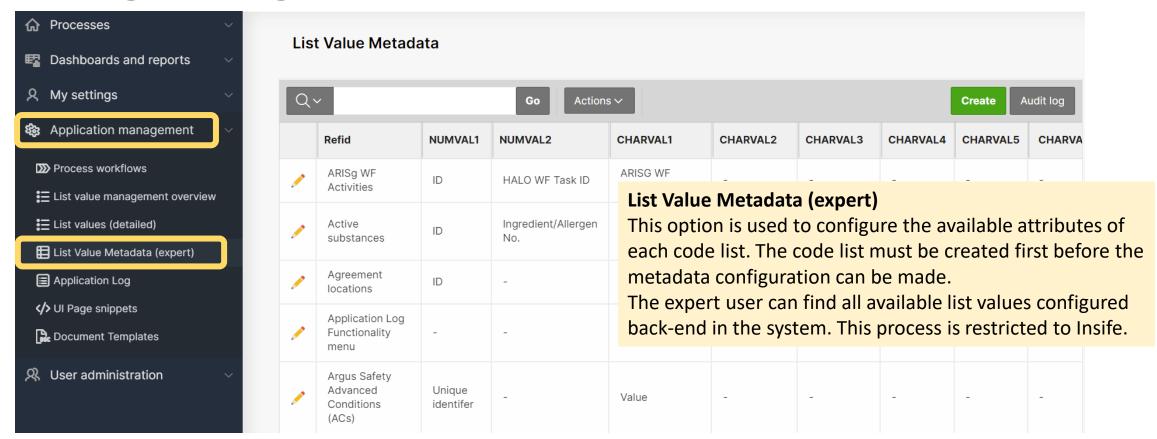
- The **List value information** tab displays specifics of the list element.
- Static information tab displays specifics of reference number, title and creation / update data. Data in this tab is driven by data updates made in List value information and Limit access tabs.
- The Limit access tab displays specifics of Limit to process and Limit to role. Limit to process dropdown allows selecting a specific Module that this list values shall be limited to. Limit to role allows selecting specific configured roles that this list value shall be limited to.

Configuration type:

- Factory: Values marked as factory values can only be edited by a user with the **Global Admin** role (in general these values are reserved by Insife as part of the core application and/ or are linked to application logic which could be impacted by updates of the values).
- **Customer:** Values marked as customer values can be edited by users with the **Application management** role.

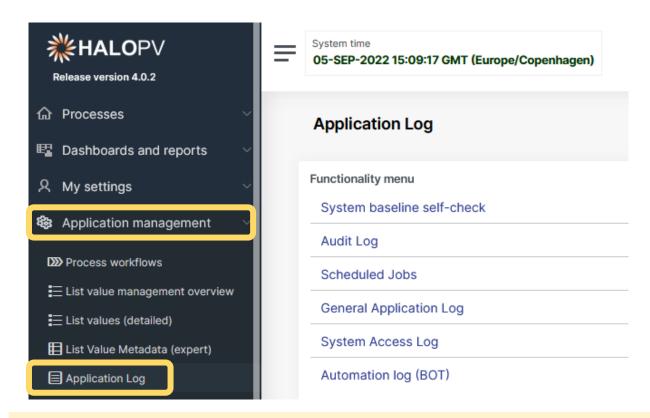


Viewing / Editing List Value Metadata





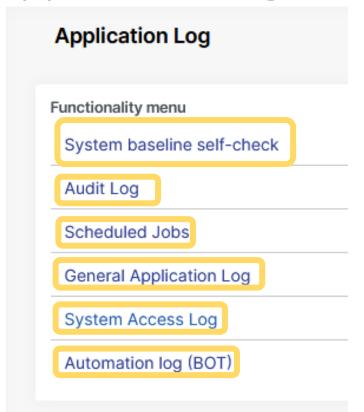
Application Log



Clicking on **Application Log** allows the user to check specific application health parameters.



Application Log

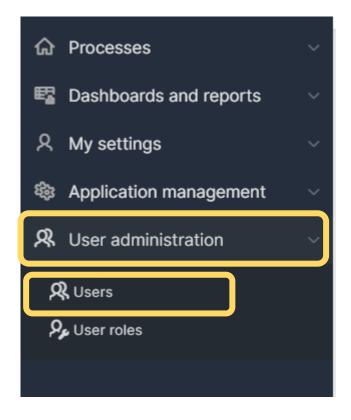


- The **System baseline self-check** allows to review / compare application with selected baseline.
- The Audit Log allows user to review any updates conducted in the application.
- The **Scheduled Jobs** allows user to review all configured jobs along with the frequency in the application.
- The **General Application Log** allows user to review / monitor all warnings / errors encountered in the application e.g., failed sent notifications
- The System Access Log allows the user to review / monitor the application user details.
- The **Automation log** allows user to review the log of executed jobs in the application.

Clicking on Application Log allows the user to perform certain application health parameters check.



Users in HALOPV



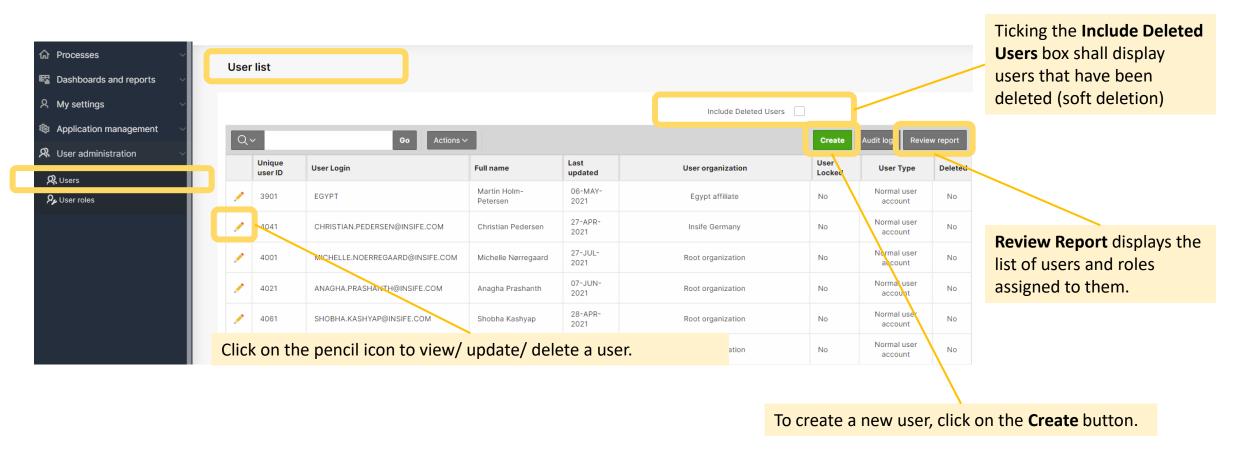
In the **User Administration > Users,** the authorized user can find all available users in the system and configure new users for HALO. Click on **Users** to access the specific user information.



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

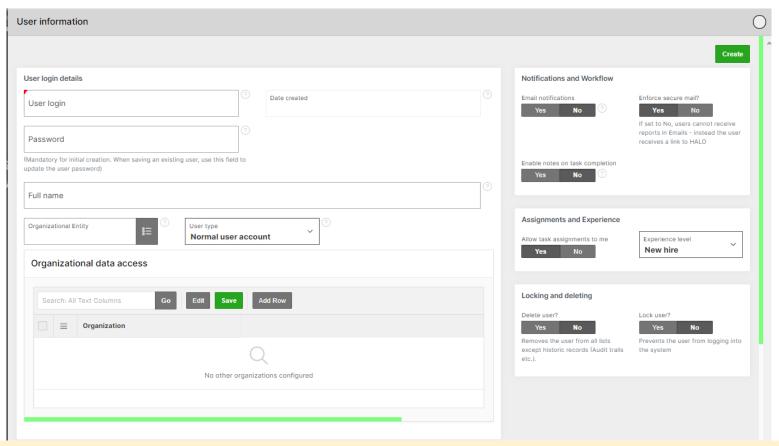
Users in HALOPV

To review all available users configured in the system, go to the **User**Administration Process and select **Users**.





Creating Users



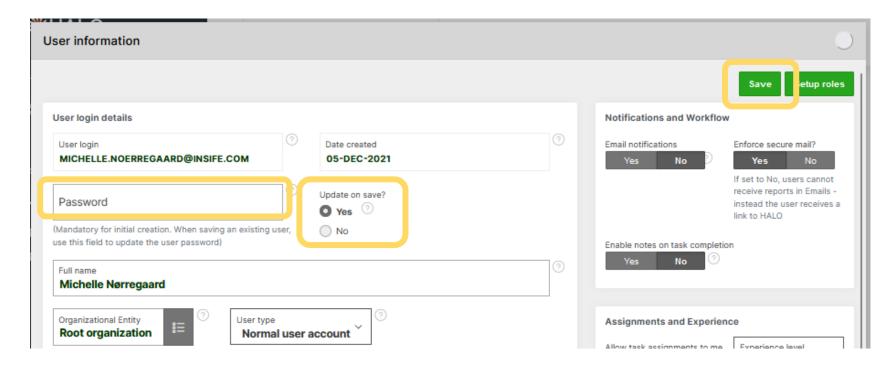
Fill in the user login details: user login, password, and organizational entity.

Click on Create to have access to the button Setup roles. Proceed to assign roles to the new user.

Note: Users can belong to more than one organizational entity



Update Users Password

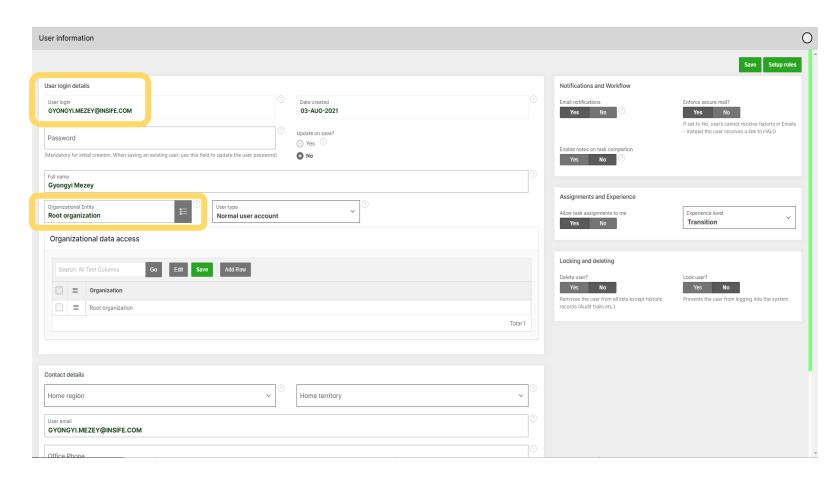


To update a user's password, tick **Yes** to **Update on save?** And type a new password using the field **Password** and click on **Save.**

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



Editing Users



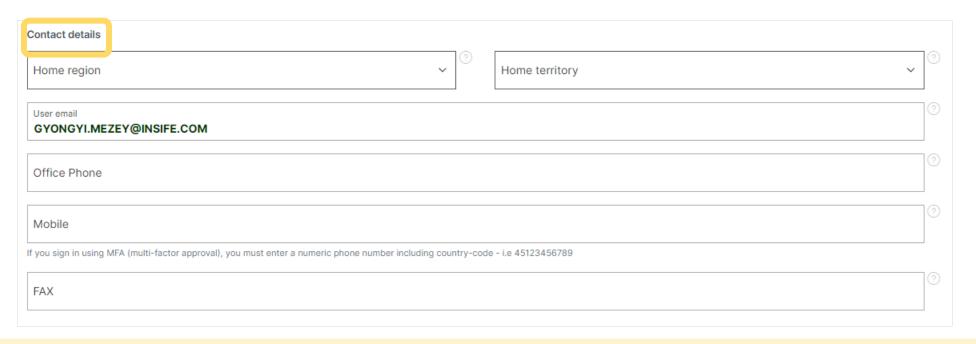
To edit a user, click the edit icon for the selected user will open up the User information window that displays the details with three main sections, User login details, Contact details, and Notifications & Workflow. The User login details section displays specifics of the selected User.

The fields **User login** and **Organizational Entity** are mandatory during new user creation.

User login is unique in the application and cannot be duplicated.



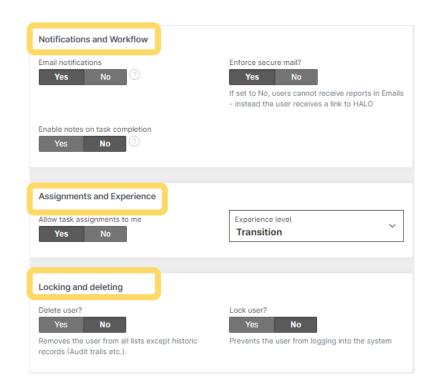
Creating / Editing Users



The **Contact details** tab section specifies the selected User location and contact details. **None** of these fields are mandatory for user creation. Although if no email address is added, the user will not receive notifications from HALOPV.



Creating / Editing Users in HALO



The **Notifications & Workflow** section displays options for the user to set the option of email notifications from the system and configure whether to populate workflow notes when the user completes or routes back a workflow task. None of these fields are mandatory for user creation.

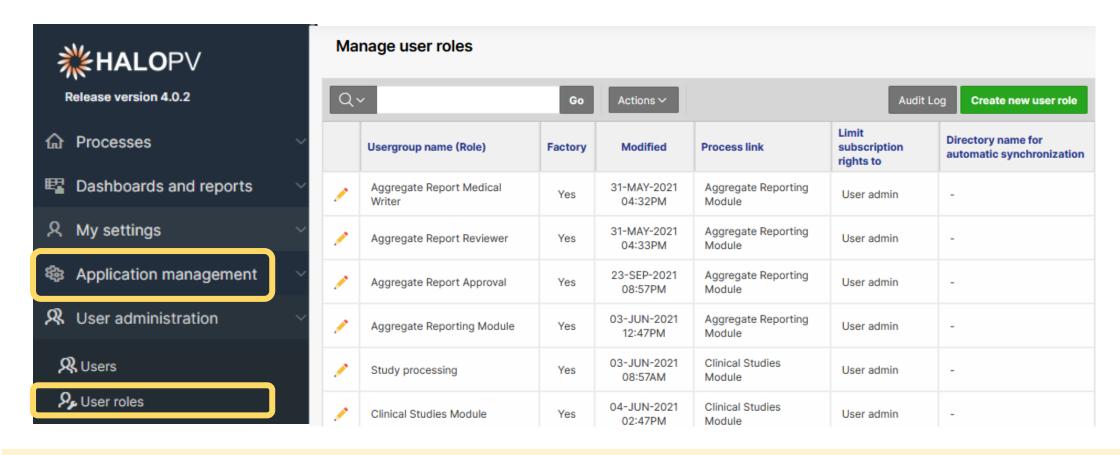
Remember to enable notifications to 'Yes' if the user should receive notifications.

The **Assignments & Experience** section displays options for the user to set if they were available for task assignment and can set the user experience level.

The **Locking & Deleting** section displays options for the user to remove user from the list and allow/prevent user to log into the system.



How to review User roles in HALO



In the **User Administration** section on the process **User roles**, the user can access all available roles in the system.

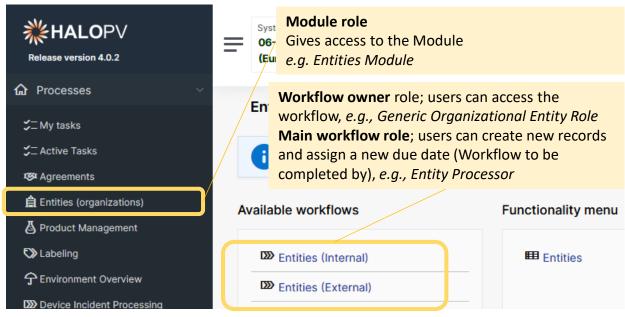


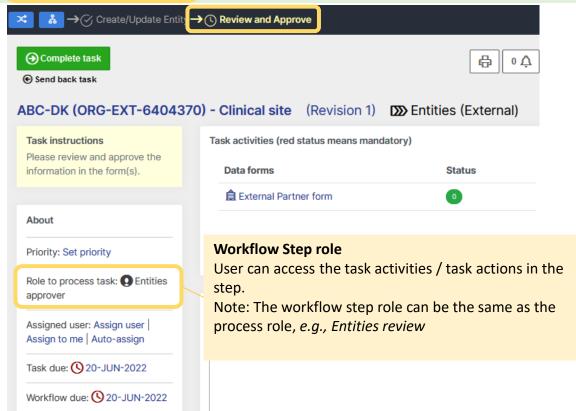
Note: The user should have **User Admin** role to perform this action

Types of roles

The example below shows the types of roles created for the **Entities Module.** Note that all roles are restricted to **the User Admin** role,
which means that only users with the **User Admin** role can add these roles to other users.





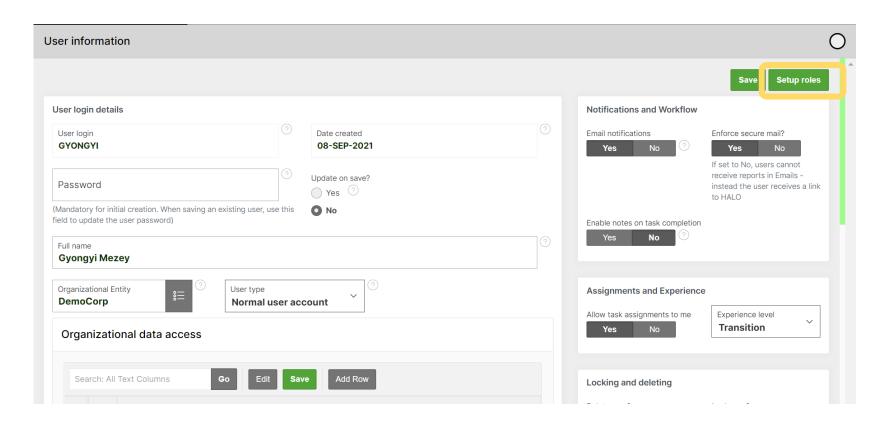


The example shows 3 levels of roles needed in order to access the Module, the Process Workflow, and a specific step.



Adding roles

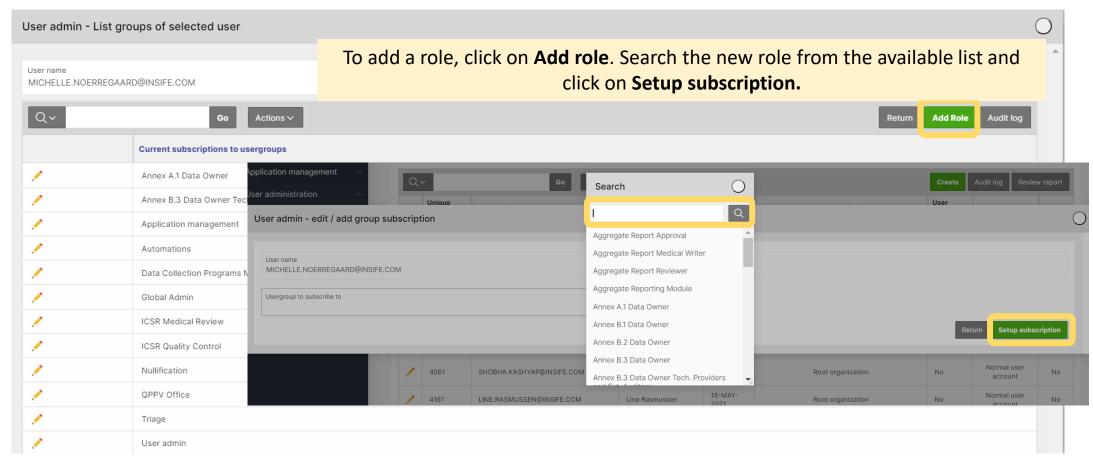
The **Setup roles** button allows to view / select user group(s) for selected user. None of these fields are mandatory for user creation.





Adding roles

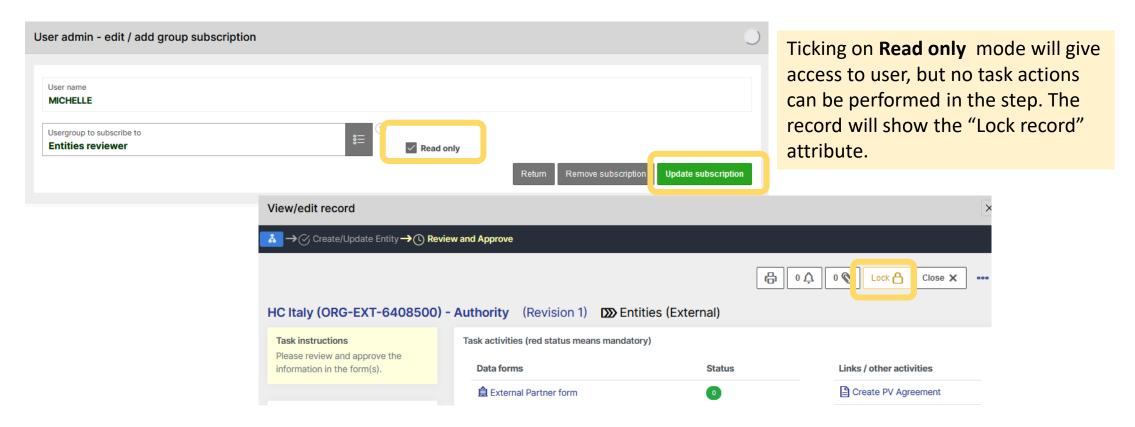
The **Add role** button allows to add a role for selected user. One user can have multiple roles.





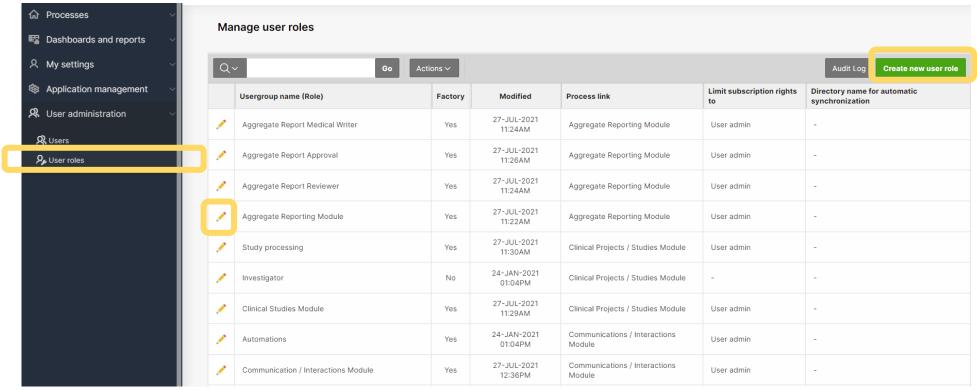
Adding roles in HALO – Read-only mode

Roles can be assigned as full access or Read-only mode.





How to configure/update User roles



On clicking on User roles, the user can find all available user groups / roles configured in the system.

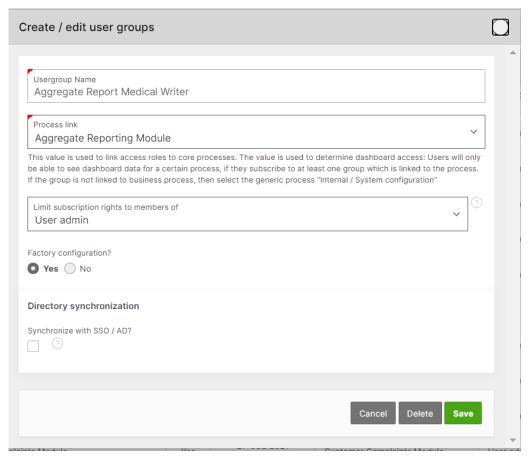
Click on the edit icon for view/ update/ delete the User group/Role.

New role can be created from this screen by clicking on Create New User Role button.

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



How to configure User roles



Clicking on the edit icon / to find details of the user groups / roles configured in the system.

User can also edit the same fields for creating new roles.

