Contents

Ennov InSight Workflows

Ennov InSight enables you to use client-specific workflows that contain multiple activities, with dependencies and preset fields, that guide processes within the system.
Workflows can contain multiple steps, with Activities that need to be completed within each step. The system will display the current Activities that must be completed to move forward in the process.

Workflows vary based on processes and system usage. To develop the necessary workflow configuration files to meet your process needs, please contact your Business Development Representative to consult with our Client Enablement team.

You can associate workflows for any of the following entities:

— Application
— Project
— Event
— Sequence
— Assembly
— Folder
— Leaf
— Document/Placeholder
— Registration
— Medicinal Product
— Registration-Package Set
— Package Set-Country
— Product Detail Set
— Tasks and Sub-Tasks
— Change
— Change Detail
— Full Product Presentation
— References

Workflows can also be started independently of any entities.

Use a Workflow

Associate a Workflow

Workflows can be associated to entities within Ennov InSight , or can be started as a standalone workflow. When associating a workflow, the following conditions apply:

— Only workflows active within Data Administration can be associated to an entity.
— The entity must be first enabled on a workflow for it to be available for associating.
— You must have at least `WRITE` permission on activities within the entity security to be able to associate a workflow.

To associate a workflow with an entity:

1. Navigate to the entity for which you want to associate.
   The attributes page for the entity opens.
2. Click Associate Workflow.
3. On the *Associate Workflow* page, select the workflow (use Ctrl key to select multiple workflows) and click >>.
4. Save.
   The workflows are associated to the entity and they are listed under Workflows on the entity attributes page.

Workflow Management

The *Workflow Management* page displays the workflow attributes derived from the workflows deployed on the Ennov InSight server. Use the *Workflow Management* page to manage workflows.

To modify the Workflow Management values:

1. Choose Go To > Data Administration.
2. Under Workflow Management, click the link for which you want to modify the values.
3. Do the following:
   a) Modify the workflow display *`name`*.
   b) Define associated entities using the >> buttons.
   c) Disassociate the entities using the << buttons.
   d) To deactivate the workflow, click Deactivate.
   e) To activate a previously deactivated workflow, click Activate.
4. Save.
   The changes are updated in the system.

Start a Non-Entity Specific Workflow

Ennov InSight enables you to use client-specific workflows that can be started independently of any entities. When starting non-entity specific workflows, the following conditions apply:

— Only workflows active within Data Administration can be associated to an entity.

— The non-entity specific attribute must be first enabled on a workflow for it to be available for associating.

— You must have at least `WRITE` permission on activities within the entity security to be able to associate a workflow.

To start non-entity specific workflows:

1. Click GO TO > Activities.
2. Click Start Workflow.
3. Select the workflows from the available list.
4. Click >>.
5. Save.
   The activities of the workflows started appear on the My Activities tab.

View Workflows and Activities

The workflows and activities associated with an entity are displayed on the attributes page for the entity, on the Workflow and Activities tabs.

To view the workflows and activities associated with an assembly entity - folder, leaf, document, or placeholder - expand the assembly tree and select it. The corresponding workflows and activities are displayed under their respective tabs.

The activities associated with a sequence assembly and its nodes are displayed under the *Working*, *Sequence*, and *Publishing* views of the sequence assembly. When a submission is added to a lifecyle, the incomplete workflows associated with the assembly and its nodes are canceled. All current activities of the canceled workflows are deleted. All canceled and completed workflows for the sequence assembly will be available from the *Sequence and Publishing* View of the lifecycled assembly.

You must have at least `READ` permission for Activities within the entity security to be able to view the Workflows and Activities tabs.

Pause a Workflow

You can pause workflows that are started. You can also pause workflows until a specified date. A paused workflow remains paused until it is resumed manually, or until it is resumed automatically at midnight of the date specified.

When pausing a workflow, the following conditions apply:

— You must have WRITE permission on Activities within the entity security.
— You must have at least WRITE permission on the associated entity.

Workflows can also be paused from the *View Workflow* page. Hyperlinked workflows navigate to the *View Workflow* page.

Pause Workflows from the Entity Attributes Page

To pause workflows from an entity attributes page:

1. Navigate to the entity for which you want to pause a workflow.
   The attributes page for the entity opens.
2. Click Workflows.
3. Select the workflows you want to pause.
   To find specific workflows, you can use the Set Filter option.
4. Click Pause at the top of the Workflow tab.
5. On the confirmation message, click OK.

Pause Workflows Until a Specificed Date

To pause workflows till a specified date:

1. Click GO TO > Activities.
2. Select Workflows.
3. Click the workflow link.
4. On the *View Workflow* page, click Pause Until.
5. On the *Pause Until* window, click the calendar and select a date.
6. Save.

Pause Workflows from Activities Home Page

To pause workflows from the Activities home page:

1. Click GO TO > Activities.
2. Select Workflows.
3. Select the workflow(s) you want to pause and click Pause.
   To find specific workflows, you can use the Set Filter option.
4. On the confirmation message, click OK.

Set Filter Criteria

After setting filter criteria, the filter statement is displayed at the top of the listed results. The filter settings remain in effect until you modify or clear the filter.

To set a filter:

1. Click Filter .

2. On the **Set Filter** dialog box, select a `grouping operator` or a `field` to query.
3. Select an equality operator.
4. Select a value.
5. Do one of the following:
   — Click **Next** to set additional filter criteria, and proceed to the next step.
   — Click **Finish** to view the results, and skip the remaining steps in this procedure.
6. Select an operator.
7. Select a **start grouping** operator, if needed.

   If you select a start grouping operator (left parentheses) at any point in the filter statement, you must select the **close grouping** operator (right parentheses) to close the grouping.
8. Repeat as needed to complete the filter statement.
9. Click **Finish.**

Resume a Workflow from Entity Attributes Page

You can resume workflows that are paused.
When resuming a workflow, the following conditions apply:
— You must have `WRITE` permission on Activities within the entity security.
— If the workflow is associated to an Entity, you must have at least `WRITE` permission on the associated entity.

To resume workflows from an entity attributes page:

1. Navigate to the entity for which you want to resume a workflow.
   The attributes page for the entity opens.
2. Click **Workflows**.
3. Select the workflow(s) you want to resume.

   To find specific workflows, you can use the Set Filter option.
4. At the top of the **Workflow** tab, click **Resume**.
   A confirmation popup window appears.
5. **OK**.

   Workflows can also be resumed from the ***View Workflow*** page or from the **Workflows** tab. Hyperlinked workflows navigate to the ***View Workflow*** page.

Resume a Workflow from Activities Homepage

You can resume workflows that are paused.

When resuming a workflow, the following conditions apply:
— You must have `WRITE` permission on Activities within the entity security.
— If the workflow is associated to an Entity, you must have at least `WRITE` permission on the associated entity.

To resume workflows from the *Activities* home page:

1. Click GO TO > Activities.
2. Select Workflows.
3. Select the workflow(s) you want to resume and click Resume .

   To find specific workflows, you can use the Set Filter option.
4. On the confirmation message, click OK.

Note: *If you try to resume workflows that are not paused, they will be remain active even after you perform the resume operation.*

Workflows can also be resumed from the *View Workflow* page or from the Workflows tab. Hyperlinked workflows navigate to the *View Workflow* page.

Delete a Workflow

You can delete a workflow associated with an entity.
When deleting a workflow, the following conditions apply:

— You must have `ADMIN` permission on Activities within the entity security to be able to delete a workflow.

— Deleting a workflow deletes all its related activities. Any current time tracking will be lost.

To delete a workflow associated with an entity:

1. Navigate to the entity for which you want to delete a workflow.
   The attributes page for the entity opens.
2. Click Workflows.
3. Select the workflows you want to delete.

   To find specific workflows, use the Set Filter option.
4. At the top of the Workflow tab, click Delete.
5. Click OK when you are prompted to confirm the deletion.
   The workflows are deleted.

Work with an Activity

In Ennov InSight , activities are user tasks within a workflow, used to direct users through a defined process. For example, assigning and approving documents within a submission.

The following functions can be performed for an activity:

— Claim/Unclaim an activity
— Transfer an activity
— Track the time of an activity
— Mark activity as complete
— Add to Favorites
— Remove from Favorites
— Modify Favorites
— Enter data for an activity
— Viewing the workflow diagram
— Setting Due Date and Priority for an Activity

Claim an Activity from Entity Attributes Page

You can claim an activity from an entity attributes page or from the *Activities* home page.
When claiming an activity, the following conditions apply:

— You must have `WRITE` permissions on activities within the Entity Security section of Security Administration.
— The activities are available to you to claim. An activity is available to be claimed if one of the following is true:
  The claim rules for the activity have been specifically set to your user name or a user group which includes your user name.

  The activity has no claim rules set.
— The activity you are claiming belongs to a workflow which is not paused.
— The activity you are trying to claim is not already assigned to another user.

To claim an activity from an entity attributes page:

1. Navigate to an entity attributes page.
2. Select Activities.
3. Click an activity you want to claim.
   To find a specific activity, use the Set Filter option.
4. Click Claim .
   Claimed activities are removed from the Unclaimed Activities tab and are added under the My Activities tab on the Activities home page (GO TO > Activities > My Activities).

Claim an Activity from Activities Home Page

You can claim an activity from an entity attributes page or from the Activities home page.
When claiming an activity, the following conditions apply:

- You must have `WRITE` permissions on activities within the Entity Security section of Security Administration.
- The activities are available to you to claim. An activity is available to be claimed if one of the following is true:
  The claim rules for the activity have been specifically set to your user name or a user group which includes your user name.

  The activity has no claim rules set.
- The activity you are claiming belongs to a workflow which is not paused.
- The activity you are trying to claim is not already assigned to another user.

To claim activities from the *Activities* home page:

1. Click GO TO > Activities.
2. Select Unclaimed Activities.
3. From the list of unclaimed activities, select the activities you want to claim.
   To find a specific activity, use the Set Filter option.
4. Click Claim .
   Claimed activities are removed from the Unclaimed Activities tab and are added under the My Activities tab on the Activities home page (GO TO > Activities > My Activities).

Claim an Activity from View Activities List

You can claim an activity from an entity attributes page or from the *Activities* home page.
When claiming an activity, the following conditions apply:

- You must have `WRITE` permissions on activities within the Entity Security section of Security Administration.
- The activities are available to you to claim. An activity is available to be claimed if one of the following is true:
  The claim rules for the activity have been specifically set to your user name or a user group which includes your user name.

  The activity has no claim rules set.
- The activity you are claiming belongs to a workflow which is not paused.
- The activity you are trying to claim is not already assigned to another user.

To claim activities from the View Activities List:

1. Right-click on an assembly root, or a folder, or a leaf and select View Activities List.
2. From the list of unclaimed activities, select the activities you want to claim.

To find a specific activity, use the Set Filter option.

3. Click Claim.
   Claimed activities are removed from the Unclaimed Activities tab and are added under the My Activities tab on the Activities home page (GO TO > Activities > My Activities).

Unclaim an Activity from Entity Attributes Page

When unclaiming an activity, the following conditions apply:
— You must have `WRITE` permissions on activities within the entity security section of Security Admin.
— Only the activities assigned to you can be unclaimed.
— The workflows to which the activities belong to are not paused.

To unclaim activities from an entity attributes page:

1. Navigate to the attributes page for the entity.
2. Select Activities .
3. Click an activity you want to unclaim.
   To find a specific activity, you can use the Set Filter option.
4. Click Unclaim.

Unclaim an Activity from Activities Home Page

When unclaiming an activity, the following conditions apply:
— You must have `WRITE` permissions on activities within the entity security section of Security Admin.
— Only the activities assigned to you can be unclaimed.
— The workflows to which the activities belong to are not paused.

To unclaim activities from the *Activities* home page:

1. Click GO TO > Activities.
2. Select My Activities.
3. From the list of claimed activities, select the activities you want to unclaim.
   To find a specific activity, you can use the Set Filter option.
4. Click Unclaim.
5. On the confirmation message, click OK.

Unclaim an Activity from View Activities List

When unclaiming an activity, the following conditions apply:
— You must have `WRITE` permissions on activities within the entity security section of Security Admin.

— Only the activities assigned to you can be unclaimed.
— The workflows to which the activities belong to are not paused.

To unclaim activities from the View Activities List:

1. Right-click on an assembly root, or a folder, or a leaf and select View Activities List.
2. From the list of claimed activities, select the activities you want to unclaim.
   To find a specific activity, use the Set Filter option.
3. Click Unclaim .
4. On the confirmation message, click OK.

Enter Data for an Activity

Prerequisites

When completing form properties for an Activity, the following conditions apply:
— You must have at least `READ` permission on Activities within entity security.
— The activity must be assigned to you.
— The activity belongs to a workflow which is not paused.

The data that is captured within each activity is determined by the configuration of the workflow and the activity within the workflow. Each activity can have different form properties depending on your specific configuration.

To specify form properties values:

1. Navigate to the activity you wish to edit.
2. Click Edit.
3. Specify the values for the form properties in their respective fields.
4. Save.

Transfer an Activity from Entity Attributes Page

You can assign an activity to a specific user, or set claim rules to users or user groups for claiming activities. When claim rules are set against activities, you must satisfy the criteria to be able to claim activities.
When transferring activities, the following conditions apply:
— You must have `ADMIN` privilege on activities within the entity security section of Security Administration to assign or set claim rules for activities.
— The workflows to which the activities belong to are not paused.

To assign an activity or set claim rules from an entity attributes page:

1. Navigate to an entity attributes page.
2. Select All Activities.

To find a specific activity, you can use the Set Filter option.

3. Select the activities you want to assign or set claim rules.
4. Click Transfer.
5. Do one of the following:
   — To assign the selected activities to a user, select Assign and select the user name from the drop-down. Move to step 7.
   — To set claim rules to activities, select Claim.
6. To allow specific users and groups to claim activities, select them from the Allow Users to Claim and Allow Groups to Claim options and click >>.

Note: Only users and groups with a minimum of WRITE permissions on Activities within Security Administration are listed under the Allow Users to Claim *and* Allow Groups to Claim *options.*

The claim rule set is displayed under the Claim Rules column on the All Activities tab.

7. Click Transfer.

You can view activities assigned to you under My Activities on the *Activities* home page (GO TO > Activities > My Activities).

Transfer an Activity from Activities Page or List

You can assign an activity to a specific user, or set claim rules to users or user groups for claiming activities. When claim rules are set against activities, you must satisfy the criteria to be able to claim activities.

When transferring activities, the following conditions apply:

— You must have ADMIN privilege on activities within the entity security section of Security Administration to assign or set claim rules for activities.

— The workflows to which the activities belong to are not paused.

To assign activities or set claim rules from the *Activities* home page or View Activities List:

1. Navigate to the list of activities using one the following methods:
   — Click GO TO > Activities > All Activities.
   — Right-click on an assembly root, or a folder, or a leaf and select View Activities List.
   — To find a specific activity, you can use the Set Filter option.
2. Select the activities you want to assign or set claim rules.
3. Click Transfer .
4. Do one of the following:
   — To assign the selected activities to a user, select Assign and select the user name from the drop-down. Move to step 6.
   — To set claim rules to activities, select Claim.

5. To allow specific users and groups to claim activities, select them from the Allow Users to Claim and Allow Groups to Claim options and click >>.

Note: Only users and groups with a minimum of `WRITE` *permissions on Activities within Security Administration are listed under the* Allow Users to Claim *and* Allow Groups to Claim *options.*

6. Click Transfer.

   You can view activities assigned to you on the My Activities tab on the *Activities* home page (GO TO > Activities > My Activities).

Track Time for an Activity

Ennov InSight enables you to manually capture the time taken to complete an activity. Time can be tracked for multiple activities simultaneously. When time tracking is in progress for more than one activity at the same time, the time captured is independent for each activity.
When tracking the time for an activity, the following conditions apply:

— You must have `READ` permissions on activities within the entity security section of Security Admin.
— You can track time only for the activities that are assigned to you.

To track time for an activity:

1. Navigate to the activity page.
2. To start the time tracking for an activity, click Start.
3. To stop the time tracking for an activity, click Stop.

   The time tracking can be resumed by clicking Start again. The consolidated time for an activity is displayed under the Total Time per User tab.

   Any time tracking that is in progress stops when:

   — A workflow is deleted
   — An activity is marked as complete
   — An activity is unclaimed
   — An activity is transferred or claimed by another user
   — An activity is paused
   — A workflow is canceled when adding an assembly or an assembly plan to lifecycle

Modify the Time Tracked for an Activity

The time tracked for an activity can be modified.

— You must have `ADMIN` permission on Activities within the entity security to be able to modify time captured for other users.
— You must have WRITE permission on Activities within the entity security to be able to modify your time.

When modifying the time tracked for an activity, the following conditions apply:

To modify the time tracked:

1. Click on the name of the activity.
2. Under Total Time per User, click the user name.
3. Under Time Tracking Details, choose the time to edit and click Edit.
4. Edit the time which is shown in the `HH:MM:SS` format.
5. Save.

Mark an Activity as Complete

When an activity assigned to you is completed, you can mark it as complete.
When marking an activity as complete, the following conditions must apply:

— You can mark an activity as complete only if it is assigned to you.
— You cannot mark activities as complete if they belong to a workflow that is paused.
— You must have at least `READ` permission on activities within the entity security.

To mark an activity as complete:

1. Navigate to the list of activities using one of the following methods:
   — On an entity attributes page, select Activities.
   — On the Ennov InSight home page, click GO TO > Activities > All Activities or My Activities.
   — On the Ennov InSight home page, under I Want To Go To, select My Activities.
   — Right-click on an assembly root, or a folder, or a leaf and select View Activities List.
2. Select the activities you want to mark as complete.
3. Click Mark Activity as Complete.

View the Workflow Diagram With Current Activity

Ennov InSight enables you to view workflow diagrams that display graphical illustration of workflows with highlighted currently active and selected activities.
Workflows vary based on processes and system usage. To view the workflow diagrams, the visual model definition must be specified in the workflow configuration files. If the visual model definition is not specified in the workflow configuration file, the Workflow Diagram option will be unavailable.

To view a workflow diagram with currently selected activity highlighted:

1. Navigate to the *View Activity* page.
2. Click on the name of an activity.
3. Click Workflow Diagram.

   The workflow diagram appears in a separate window. To enlarge the diagram, click inside the window. To restore the diagram to its original size, click again.

View the Workflow Diagram With Active Activities

Ennov InSight enables you to view workflow diagrams that display graphical illustration of workflows with highlighted currently active and selected activities.
Workflows vary based on processes and system usage. To view the workflow diagrams, the visual model definition must be specified in the workflow configuration files. If the visual model definition is not specified in the workflow configuration file, the Workflow Diagram option will be unavailable.

To view a workflow diagram with currently active activities highlighted:

1. Navigate to the *View Workflow* page.
2. Click on the name of a workflow.
3. Click Workflow Diagram.

   The workflow diagram appears in a separate window. To enlarge the diagram, click inside the window. To restore the diagram to its original size, click again.

Set Due Date and Priority for an Activity from Entity Attributes Page

When setting a due date and priority to an activity, the following condition apply:
— You must have `WRITE` permissions on activities within the Entity Security section of Security Administration.
— The activities belong to a workflow which is not paused.

To set due date and priority for an activity from an entity attributes page:

1. Navigate to an entity attributes page.
2. Select Activities.
3. Click an activity.

   To find a specific activity, use the Set Filter option.
4. Click Edit.
5. Select a due date and priority for an activity from their respective fields.
6. Save.

Set Due Date and Priority for an Activity for Multiple Activities

When setting a due date and priority to an activity, the following condition apply:
— You must have `WRITE` permissions on activities within the Entity Security section of Security Administration.
— The activities belong to a workflow which is not paused.

To set due date and priority for multiple activities:

1. Navigate to the list of activities using one of the following ways:
   — Click GO TO > Activities > All Activities.

— Right-click on an assembly root, or a folder, or a leaf and select View Activities List.
— Click Find > Activities

2. From the list of activities, select the activities for which you want to set due date and priority.
   To find specific activities, use the Set Filter option.
3. Click Mass Update.
4. Do the following:
   — To schedule a due date, select Due Date and set a date using the Calendar.
   — To set priority, select Priority and select a number from the drop-down list.
5. Do the following:
   — To overwrite the existing values and save, click Update and Overwrite.
   — To update changes when by default the fields do not have any values, click Update and Preserve.

Favorites

The Favorites feature enables you to save locations in Ennov InSight , providing an easy way to return to entities and entity details that you use.
You can:
— Add a Favorite
— Modify a Favorite
— Remove a Favorite

Add a Favorite

Adding favorites enables you to return to frequently used entities and entity details in Ennov InSight .
The entities and entity details that you choose as favorites are displayed in the I Want To Go To section on the *Home Page*, and in the Favorites menu. Favorites can be added, modified, and deleted.

To add a Favorite:

1. Go to the *attribute* page for the entity.
2. Click Add entity to Favorites ★.

Modify a Favorite

You can modify a favorite from the Favorites menu.
You can modify the name of saved favorites to make it easier for you to recall frequently used entities and entity details in Ennov InSight . Your favorites are displayed in the I want to go to section on the My Favorites tab on the *Home* Page, and in the Favorites menu. Favorites can be added, modified, and deleted.

To modify a favorite from the Ennov InSight menu bar:

1. On the Ennov InSight menu bar, click Favorites > Manage Favorites.
2. Select the favorite that you want to edit and click Edit Link.
3. On the *Edit Link* page, enter a new `name` for the favorite.

This change affects only the name displayed in the *My Favorites* section. The actual entity name will not be changed.

4. Save.

Remove a Favorite

You can remove saved favorites to clear entities and entity details that are no longer needed from your list.

Your favorites are displayed in the I Want to Go to section in My Favorites tab on the *Home Page*, and in the Favorites menu. Favorites can be added, modified, and deleted.

There are two ways to remove a favorite:

— Use the Manage Favorites option on the Favorites menu.

— Remove the favorite status while viewing the *entity attribute* page that was previously marked as a `Favorite`.

Workflow Users and Groups

As a workflow administrator, you are responsible for managing the workflow users and groups.
To be a workflow administrator, the Workflow Administrator entity within the Home Page Access section of Security Admin must be enabled.

All users and groups configured within Ennov InSight will be automatically added to the Activities security. The names of the users with appropriate privileges for Activities in the security admin will be appear under the workflow users list. For information on enabling Activities privileges to users, see the topic *Entity Security*.

To view workflow users and groups:

1. Select Go To > Activities
2. On the top right corner of the page that appears, click Workflow Admin.

   The users and groups are displayed under their respective tabs.

   — If a user is included in a group that is already associated with a workflow, the user will have to log back on to Ennov InSight to view the activities assigned to the user.

   — If an activity via workflow xml definition is assigned to a user or group that does not exist, the activities are displayed on the All Activities tab.

Create Virtual Groups

Virtual groups are user groups which are used within activities only. Users with appropriate privileges for activities in the security admin can be added to the virtual groups.

To create a virtual group:

1. Click GO TO > Activities
2. On the top right corner of the page that appears, click Workflow Admin.
3. On the *Workflow Admin* page, select Groups.
4. On the top right corner of this page, click Add Group.
5. Under Group Name, enter a name for the group.
6. From the Groups to include list, select the groups you want to include to the virtual group and click >>.
7. From the Users to include list, select the users you want to include to the virtual group and click >>.
8. Under Description, enter notes for the group.
9. Save.

   The virtual group is created.

Modify Workflow Groups

Ennov InSight enables you to activate or deactivate a workflow group. For virtual groups, you can modify its name and also add or remove users and groups.

To modify a workflow group:

1. Select **Go To > Activities**.
2. On the top right corner of the page that appears, click **Workflow Admin**.
3. On the *Workflow Admin* page, select **Groups**.
4. Click the name of the group that you want to modify.
5. Click **Edit**.

   If you are modifying a virtual group, go to the next step. Else, go to step 7.
6. Do any of the following:

Task	Action
Add a group to a virtual group:	Select the group from the **Groups to include** list and click **>>**.
Remove a group from a virtual group:	Select the group from the **Selected** list and click **<<**.
Add a user to a virtual group:	Select the user from the **Users to include** list and click **>>**.
Remove a user from a virtual group:	Select the user from the **Selected** list and click **<<**.
Edit the virtual group name:	Under **Group Name**, edit the virtual group name.

__Note:__ When activities with claim rules are set to a virtual group, renaming the virtual group will apply those existing activities and claim rules to the new virtual group name.

7. Enter a description for the group.
8. Do one of the following:

Task	Action	Outcome
Activate a group	Under **Is Active?** select **Yes**.	Activating a group renders access to workflows to the users of a group.
Deactivate a group	Under **Is Active?** select **No**.	Deactivating a group restricts workflow access to the users of a group.

9. **Save**.

Delete Virtual Groups

When a virtual group is no longer needed, you can delete it from the system.

To delete a virtual group:

1. Select Go To > Activities.
2. On the top right corner of the page that appears, click Workflow Admin.
3. On the *Workflow Admin* page, select Groups.
4. Click on the link of the group that you want to delete.
5. Click Delete.
6. Click OK on the confirmation message.
   The virtual group is deleted.

Configure Workflow XML File to Create Entities

Ennov InSight enables you to configure a workflow XML file to create the following entities.

- Active Ingredient
- Application
- Component
- Event
- FPP Previous EV Code
- Full Product Presentation
- PDS Details:
    - Active Ingredient
    - Flu Strain
    - Indication
    - Indication/Intended Use
    - Package Set
    - Reference Strain
    - Substance
- Pharmaceutical Product
- Product
- Product Family
- Reference
- Reference Active Ingredient
- Registration
- Registration Attachment
- Registration FPP Attachment
- Sequence
- Task/Sub-Task

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs. Please contact your Business Development Representative for more information.

Configure Workflows to Create an XEVMPD XML File

Ennov InSight enables you to create an XEVMPD XML file for Authorised Product section, including validation. You can create an XEVMPD XML file via:

- Full XEVMPD Submission flow with the help of workflow with filter screen and data selection, including validation for Authorised Product
- Short XEVMPD Submission flow from defined FPP with the help of workflow, including validation for Authorised Product

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs. Please contact your Business Development Representative for more information.

Configure Workflow XML File to Send E-mail Notifications

Ennov InSight enables you to configure a workflow XML file to send e-mail notifications when creating, updating, or associating entities.
A workflow XML can be configured to:

— Get workflow data from entities and form properties in an e-mail
— Send e-mail to specific e-mail address
— Send e-mail to multiple e-mail addresses
— Send e-mail to multiple e-mail addresses from multiple entities
— Send e-mail to an initiator
— Send e-mail to an assignee
— Send e-mail from the configured extra fields (text field, drop-down field, multi-select field, custom lists)
— Include link to an entity in an e-mail
— Send e-mail notifications at a specified time
— Send e-mail with a link to an activity when it is created and a user is manually assigned to that activity, and the user is not defined in the workflow XML file
— Send e-mail with a link to an activity to a group of users (selected from a list in previous activity or selected in Concerned Parties) when that activity is created
— Send e-mail with the link to an activity to a newly assigned user when that activity is transferred

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs. Please contact your Business Development Representative for more information.

Configure Workflow XML File to Update Entities

Ennov InSight enables you to configure a workflow XML file to update the entities.
Both single and multiple entities matching the configured search criteria can be updated.

- Active Ingredient
- Application
- Change
- Change Details
- Component
- Event
- FPP Previous EV Code
- Full Product Presentation
- PDS Details:
    - Active Ingredient
    - Flu Strain
    - Indication
    - Indication/Intended Use
    - Package Set
    - Reference Strain
    - Substance
- Pharmaceutical Product
- Product
- Product Family
- Reference
- Reference Active Ingredient
- Registration
- Registration Attachment
- Registration FPP Attachment
- Sequence
- Task/Sub-Task

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs. Please contact your Business Development Representative for more information.

Configure Workflows to Associate Workflows to an Entity

Ennov InSight enables you to configure a workflow XML file to associate workflows to entities.

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs, please contact your Business Development Representative for more information.

Configure Workflows to XEVMPD Bulk Update

Ennov InSight enables you to configure the bulk update of XEVMPD related fields to the following entities:
— Application
— Package Set Registration
— Full Product Presentation

The Ennov Client Enablement team can assist in developing the necessary workflow configuration files to meet your process needs. Please contact your Business Development Representative for more information.

Note: *After configurations or workflows are updated, all in-process workflows should be deleted and restarted.*
For any workflow, the From e-mail address must be a Calyx.ai email as it is registered with the Ennov InSight SMTP server.

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