

OpenRIMS. Import workflow configuration from another server

(draft 2023-09-18)

Motivation

Before workflow goes to production it will be necessary to create, test, and approve it in the Sandbox System.

After approval, the workflow definition should be imported to the Production Server. A workflow definition includes:

- Dictionaries
- Resources
- Data configurations
- Workflow configuration

The manual import process is complex, cumbersome, and depends on human factors. Since 2023-09-18 this process has been automated

Below is a description of the new OpenRIMS feature available at

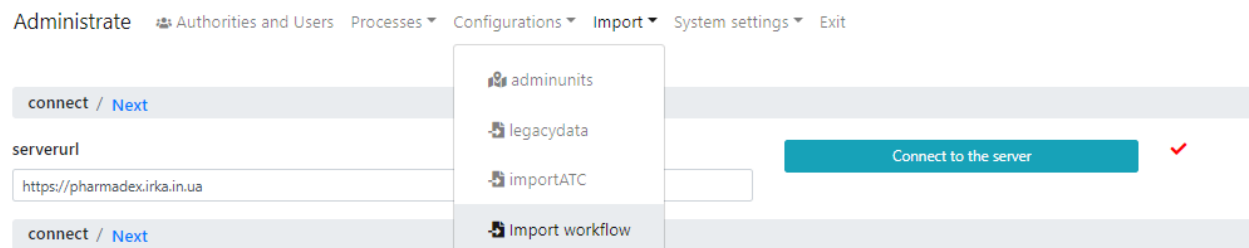


Figure 1 Import workflow feature

The roadmap

Connect to the server

Input the address of the server and, then, press “Connect to the server”

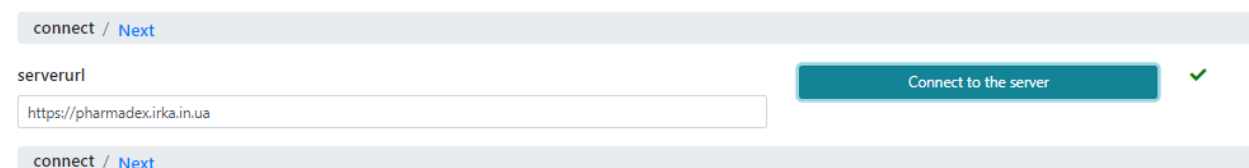


Figure 2 Connect is a successful

Press “Next” for the workflow to import selection.

Select a workflow to import

The right side is workflow groups, the left is workflow

Administrate Authorities and Users Processes Configurations dataimport systemsetting Exit

Host - Conducting pharmacy inspection

Cancel

connect / Processes / Next

Name	Additional information
<input type="checkbox"/> De-registration	
<input type="checkbox"/> Guest	First time applications
<input checked="" type="checkbox"/> Host	Renew, Suspend, Amendments, Cancel
<input type="checkbox"/> inspections	
<input type="checkbox"/> Modification	
<input type="checkbox"/> Shutdown	Cancel the license, authorization, etc

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Name	Additional information
<input checked="" type="checkbox"/> Conducting pharmacy inspection	The conduction inspection is NRA's internal process that typically runs concurrently with another inspection regulatory process. The goal of conducting an inspection is the inspection outcome. There are two known forms of the inspection outcome • Inspection report • Concise notes (Adhikari, 2022) Additionally, there are such known methods of inspection conducting: • Document analysis • Place visits, lab tests, etc.
<input type="checkbox"/> Disciplinary Pharmacy Inspection	The disciplinary inspection can be initiated by Moderator or Supervisor using the Monitoring feature. The conducting inspection process runs concurrently.
<input type="checkbox"/> Importer Inspection	Scheduled inspection of importer's facility
<input type="checkbox"/> Importer Renew	Scheduled renew of an Importer's certificate
<input type="checkbox"/> Pharmacy Inspection	Scheduled pharmacy inspection
<input type="checkbox"/> Pharmacy Renew	Scheduled pharmacy renew
<input type="checkbox"/> Renew a company	Is this company alive and the representative is valid
<input type="checkbox"/> Routine Inspection	The first routine inspection is usually scheduled by the permit approval process. The following routine inspection will be scheduled by the previous routine inspection process. Following the Good Practices (Council) the scheduled interval may be assigned by the inspection result. The conducting inspection process runs concurrently.
<input type="checkbox"/> Wholesaler inspection	Scheduled inspection of wholesaler facility
<input type="checkbox"/> Wholesaler Renew	Scheduled renew of a wholesaler's certificate

Figure 3 The workflow to import is selected

Press "Next" to import checklists

Import checklists

Administrate Authorities and Users Processes Configurations dataimport systemsetting Exit

Host - Conducting pharmacy inspection

Cancel

connect / Processes / Checklist Dictionaries / Next

Existing dictionaries

url	Name	Additional information
dictionary.inspection.assignment	Inspection Assignment Checklist	

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Dictionaries for import

url	Name	Additional information
<input type="checkbox"/> dictionary.inspection.report.approval	Inspection report approval checklist	
<input type="checkbox"/> dictionary.inspection.report.learning	Inspection Report learning checklist	
<input type="checkbox"/> dictionary.inspection.report.prepare	Inspection report preparation checklist	
<input type="checkbox"/> dictionary.inspection.report.finalize	Inspection report finalization checklist	

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connect / Processes / Checklist Dictionaries / Next

Figure 4 Import is possible only for checklist dictionaries that do not exist on your server (new ones)

Press "Next" to import the classifiers used

Import classifiers

Classifiers are dictionaries that are available in electronic forms

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Cancel

[connect](#) / [Processes](#) / [Checklist Dictionaries](#) / [Dictionaries](#) / [Next](#)

Existing dictionaries

url	Name	Additional information
dictionary.council.certificate	Council Certificate	
dictionary.object.person.academic	Academic Qualifications	Please select the academic qualification for the pharmacist
dictionary.payment.proof.documents	Receipt upload	
dictionary.site.tenancy	Premises documents	
dictionary.resources.pharmacy.employee.agreements	Templates to create employee agreements	Version from 2021.07.31
dictionary.person.photo	Photo of person	May be used for documents
dictionary.payment.type	Payment Options	
dictionary.pharmacy.site.photos	Photos of the site	Please, Add a recently taken photo of the pharmacy.
dictionary.application.cover.letter	Application Cover Letter	While application concluded application, system generate one application letter and applicant need to sign and upload along with all filled up form.
dictionary.employee.agreements	Employee agreements for retail	the pharmacist needs to sign ad upload a number of documents (agreements) in order to be registered with the pharmacy
dictionary.pharmacy.site.payment.amount	Payment amount calculator	
dictionary.person.passport	Citizenship Certificate	
dictionary.pharmacy.registration.fees	Fees for registration and other applications for pharmacy	
dictionary.cover.letters	The signed application	Copy of the signed application
dictionary.academic.certificate	Academic certificate	upload a copy of all relevant academic certificates
dictionary.employee.agreement	Employee agreement	Employee agreement

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Dictionaries for import

	url	Name	Additional information
<input type="checkbox"/>	dictionary.inspection.reports.downloads	Possible inspection - related downloads	
<input type="checkbox"/>	dictionary.inspection.report.learning.com	Business commentary to the inspection report	

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Figure 5 Import is possible only for classifier dictionaries that do not exist on your server (new ones)

Import Resources

The resource is an electronic form control that allows downloading files and generating documents using templates. Please, note, that the files and/or templates themselves will not be imported.

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Cancel

[connect](#) / [Processes](#) / [Checklist Dictionaries](#) / [Dictionaries](#) / [Resources](#) / [Next](#)

titleexistdata

url	Additional information	Data Configuration URL
pharmacy.new.invoices	Allows download invoices to register a new pharmacy	configuration.resource.pharmacy.site.registration.invoice
pharmacy.new.cover ✓	Cover letter for Pharmacy application both new and renewal	configuration.resource.cover.letter

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Close

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Download document template

File Name	Name	Additional information
pvt.docx	Letter	cover letter for both new and renewal applications

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[connect](#) / [Processes](#) / [Checklist Dictionaries](#) / [Dictionaries](#) / [Resources](#) / [Next](#)

Figure 6 All necessary resources are existing. We do not need to import

Press “Next” to import electronic forms

Electronic form definitions

Electronic form definitions can be found in Administrate-Configurations-Data-Configurations. They are used as application pages and workflow step data.

Administrate Authorities and Users Processes Configurations dataimport systemsetting Exit

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connect / Processes / Checklist Dictionaries / Dictionaries / Resources / Configurations / Next

Existing data

url	Additional information
pharmacist.details	Details pharmacist retail, wholesale importer
pharmacy.site.payment	Payment for retail, wholesale, import
person.qualification	Qualification of retail, wholesaler worker
owner.details	Details pharmacist retail, wholesale importer
site.pharmacist	WF - Details of pharmacist working in a Retail, Wholesale site
pharmacist.employee.agreements	Agreements for pharmacist retail, wholesale, importer
retail.site.owned.persons	WF - Retail pharmacy individually owned
retail.site.schedule8	Cover for retail,wholesale, importer
site.owners.persons	WF - List of persons ownership of any site - retail, wholesale, manufacturing
site.pharmacists	
retail.pharmacy.classifiers	Classifiers that suit retail pharmacy
site.owner.person	WF - Details of owner of Retail, Wholesale site

Data for import

url	Additional information
<input type="checkbox"/> inspection.assignment.data	Page in the inspection conducting workflow allows formulate inspection assignment
<input type="checkbox"/> inspection.report.prepare.data	Prepare the report step - uploading the template, filling out it, and download report draft
<input type="checkbox"/> inspection.report.learning.data	feedback from the client related to the inspection report
<input type="checkbox"/> inspection.report.approval.data	The report should be approved, or additional job will be needed
<input type="checkbox"/> inspection.report.finalize.data	Final release of the inspection report

connect / Processes / Checklist Dictionaries / Dictionaries / Resources / Configurations / Next

Figure 7 Only electronic forms that do not exist on your server will be imported

Press “Next” to import workflow steps

Workflow steps

Workflow steps are sequencey of workflow activities available using “Administrate-Processes-Workflows”

Administrate Authorities and Users Processes Configurations dataimport systemsetting Exit

Host - Conducting pharmacy inspection

connect / Processes / Checklist Dictionaries / Dictionaries / Resources / Configurations / Workflows / Next

Existing records

Name	Additional information
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Records for import

global_import_short

Name	Additional information
Conducting pharmacy inspection	The conduction inspection is NRA's internal process that typically runs concurrently with another inspection regulatory process. The goal of conducting an inspection is the inspection outcome. There are two known forms of the inspection outcome • Inspection report • Concise notes (Adhikari, 2022) Additionally, there are such known methods of inspection conducting: • Document analysis • Place visits, lab tests, etc.
Assignment	Determine outcome and method Assign an inspector
Prepare the report	Conduction an inspection, prepare the report
Learning the report	Send a report to the pharmacy owner to get acquainted
Finalize the report	
Approve the report	

connect / Processes / Checklist Dictionaries / Dictionaries / Resources / Configurations / Workflows / Next

Figure 8 Typically, all steps do not exist on your server

Press “Next” for the Import Protocol

The Import Protocol

The Import Protocol contains import results and follow-up steps that may be necessary. Typically, it may be necessary to import Host Workflows that are listed in the imported workflows but do not exist on your server. Additionally, it will be necessary to assign access to the new imported workflow.

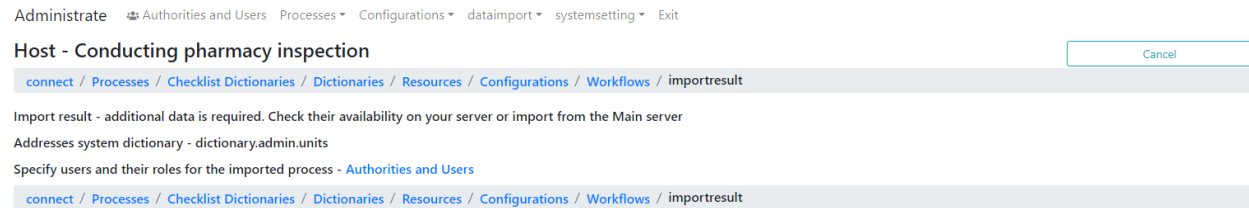


Figure 9 The Import Protocol