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

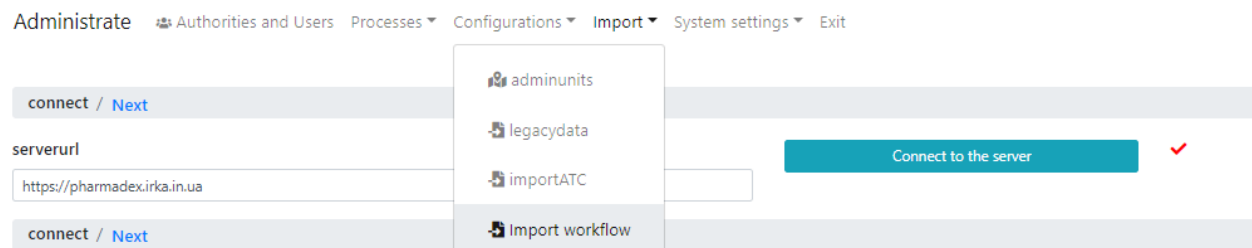Below is a description of the new OpenRIMS feature available at

Figure 1 Import workflow feature

The roadmap

Connect to the server

Input the address of the server and, then, press "Connect to the server"
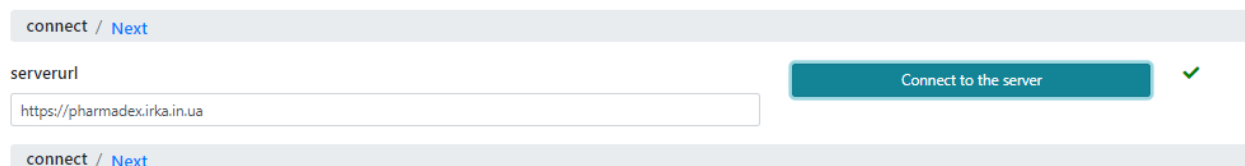

Figure 2 Connect is a successful

Press "Next" for the workflow to import selection.

Select a workflow to import

The right side is workflow groups, the left is workflow

Figure 3 The workflow to import is selected

Press "Next" to import checklists

Import checklists

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

Dictionaries for import

url	Name	Additional information
☐ dictionary.inspection.reports.downloads	Possible inspection - related downloads	
☐ dictionary.inspection.report.learning.commentary	Business commentary to the inspection report	

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

Close
⊘

titlenotexistdata

url	Additional information	Data Configuration URL

Download document template

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

⊘

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.

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 sequence of workflow activities available using "Administrate-Processes-Workflows"

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.

Administrate · Authorities and Users · Processes ▾ · Configurations ▾ · dataimport ▾ · systemsetting ▾ · Exit

Host - Conducting pharmacy inspection   Cancel

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

Import result - additional data is required. Check their availability on your server or import from the Main server

Addresses system dictionary - dictionary.admin.units

Specify users and their roles for the imported process - Authorities and Users

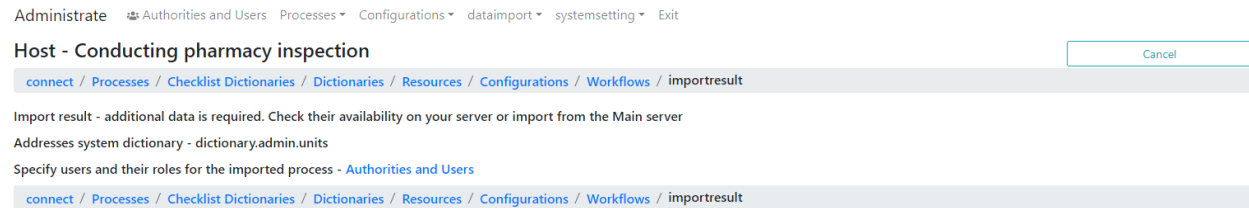connect / Processes / Checklist Dictionaries / Dictionaries / Resources / Configurations / Workflows / importresult

Figure 9 The Import Protocol