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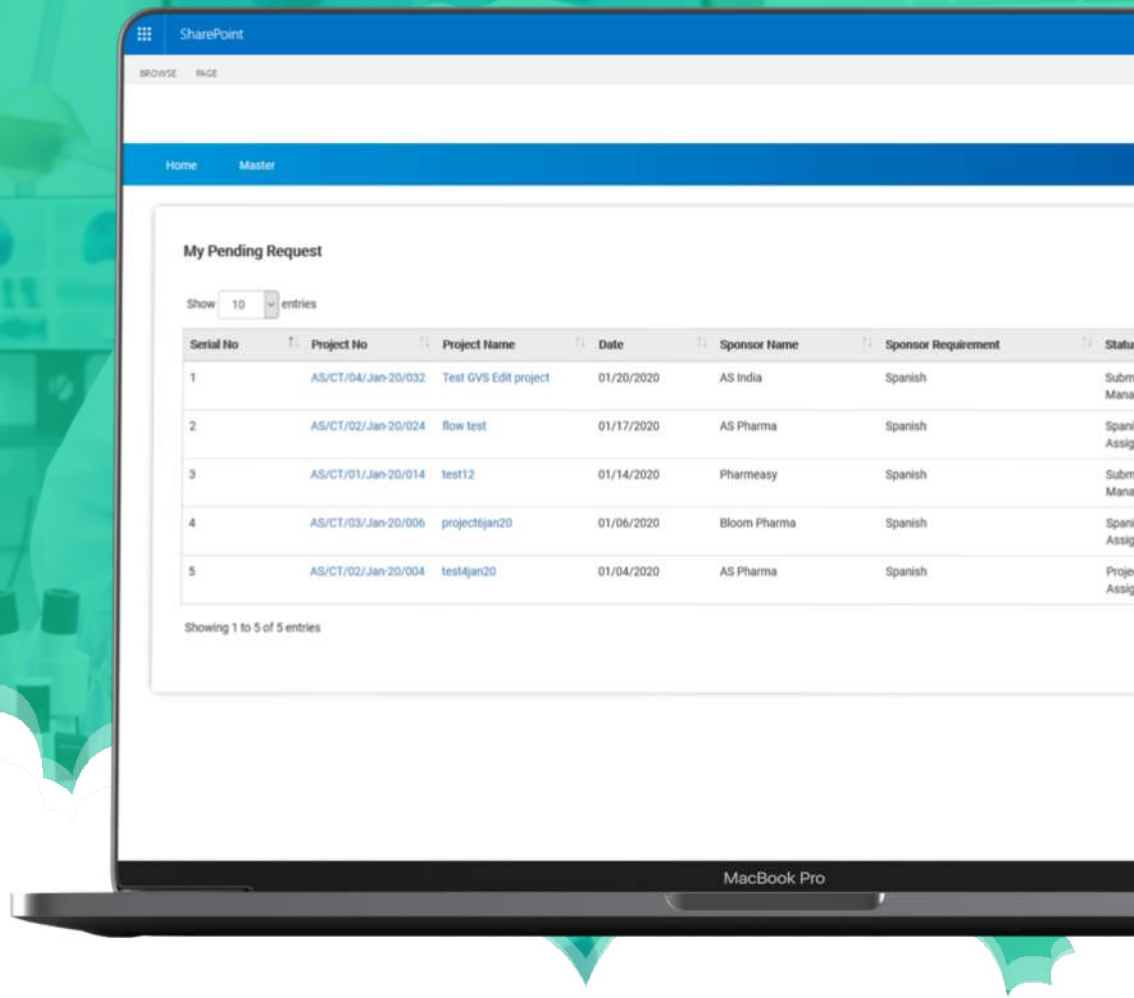
India | Singapore

Clinical Trials Protocol Approval System



Case Study

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About the client

- A leader in clinical research in Latin American region
- Our client is a comprehensive clinical and analytical solutions provider focused of research, helping pharmaceutical companies in their quest for better and safer medicines
- Founded in 2011 and headquartered in Monterrey, Nuevo León, Mexico, they have grown to be 200 strong
- Their operate and target the North and Latin America

Problems due to old process

- Client was using a file-server to host their documents
- Approval process was carried out on emails
- Manual version management
- Difficult to use due to collaboration issues, document change conflicts were common
- The protocol manager was supposed to manually track, review changes and notify approvers regarding pending approval

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The client wanted a digital approval system in which various employees from different business units and countries can easily create approval requests. They specially wanted to have complete version control on various documents being created as a part of protocol followup.

Solution Objectives

- Client wanted a highly secure system of their own to maintain their confidential data
- System should be secure enough to handle confidential data
- Streamlined approval process, with ease of use and automation
- Tracking and versioning of document throughout and after the approval process

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Solution Details

- Whole approval process is covered by system, so that users don't have to rely on emails or any third party tool
- Easy tracking and version management, let the users access any version of any document whenever needed, without worrying about overwriting or storing multiple backups of the same file, hence eliminated redundancy
- System is designed to make the users transition from their old method to the new system with less efforts. Even though they weren't using a tool earlier, they need minimal training to be comfortably using the system

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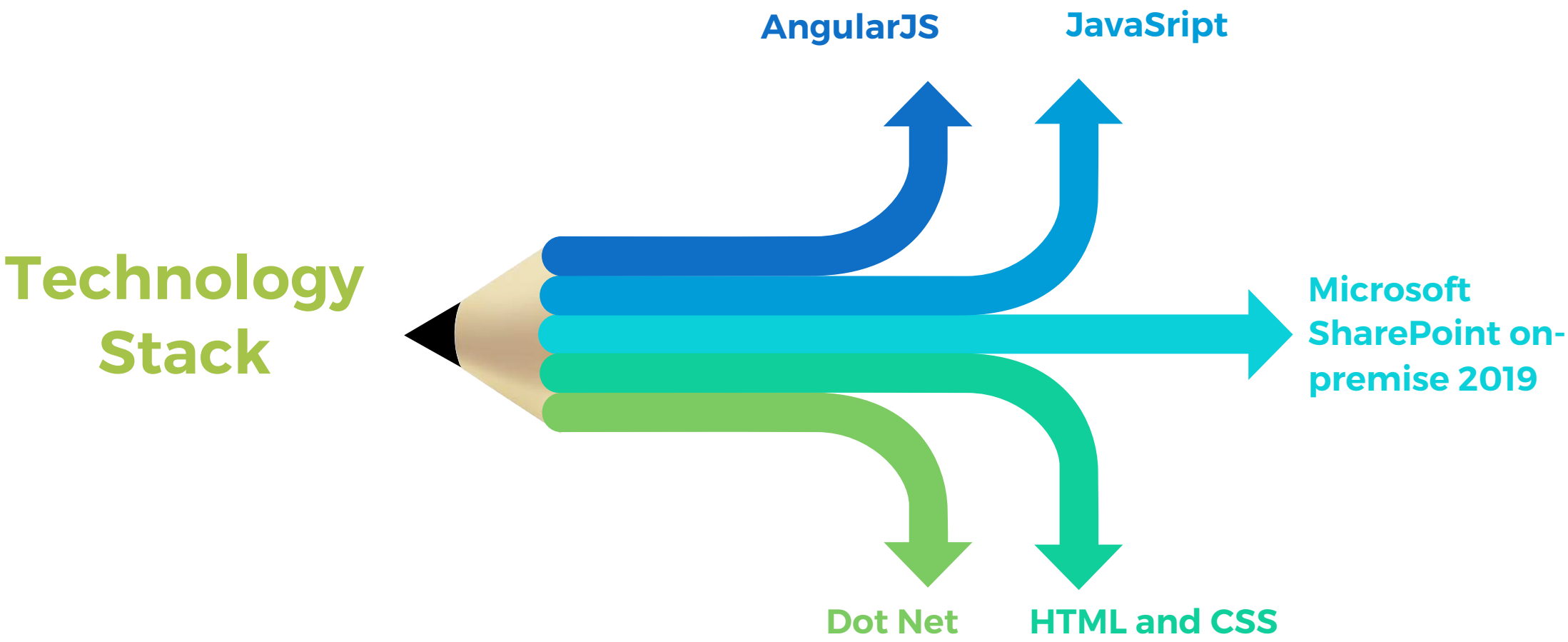
Technology Stack

We used SCRUM to manage the project and deliver value iteratively



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Bloom developed the entire project from start and client wanted to retain the default UI of Microsoft SharePoint while concentrating more on process improvement and quick deployment.

There was a challenge to to work with global team of client and we used Hub and Spoke engagement model to implement the project.

The team

- Product Owner
- Scrum Master
- SharePoint Architect
- Lead SharePoint Developer
- Web Developer
- Business Analyst
- QA engineer

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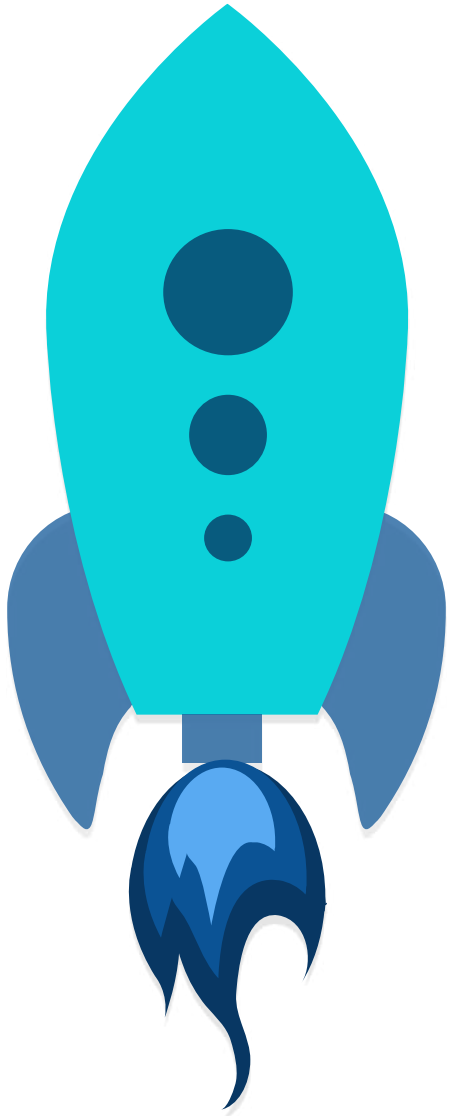
Business Impact

- Complete visibility into the status of any approval request
- Custom routing and workflow based on the department or organization's needs
- Set automated alerts and reminders for any part of the process
- Sequential or parallel routing
- Single or group approvals
- Automatically maintain a complete audit trail of all activity and communication



SCREENSHOTS

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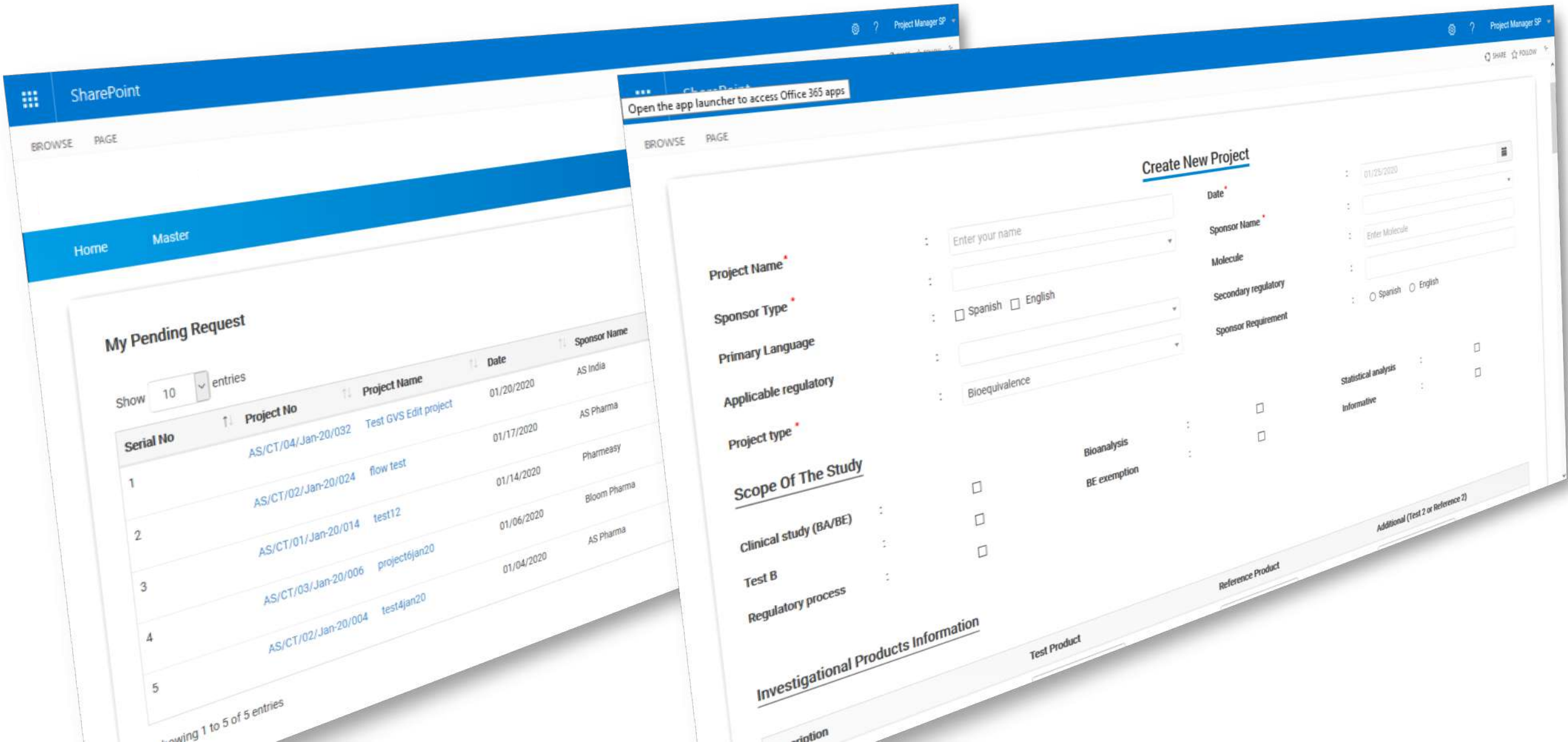

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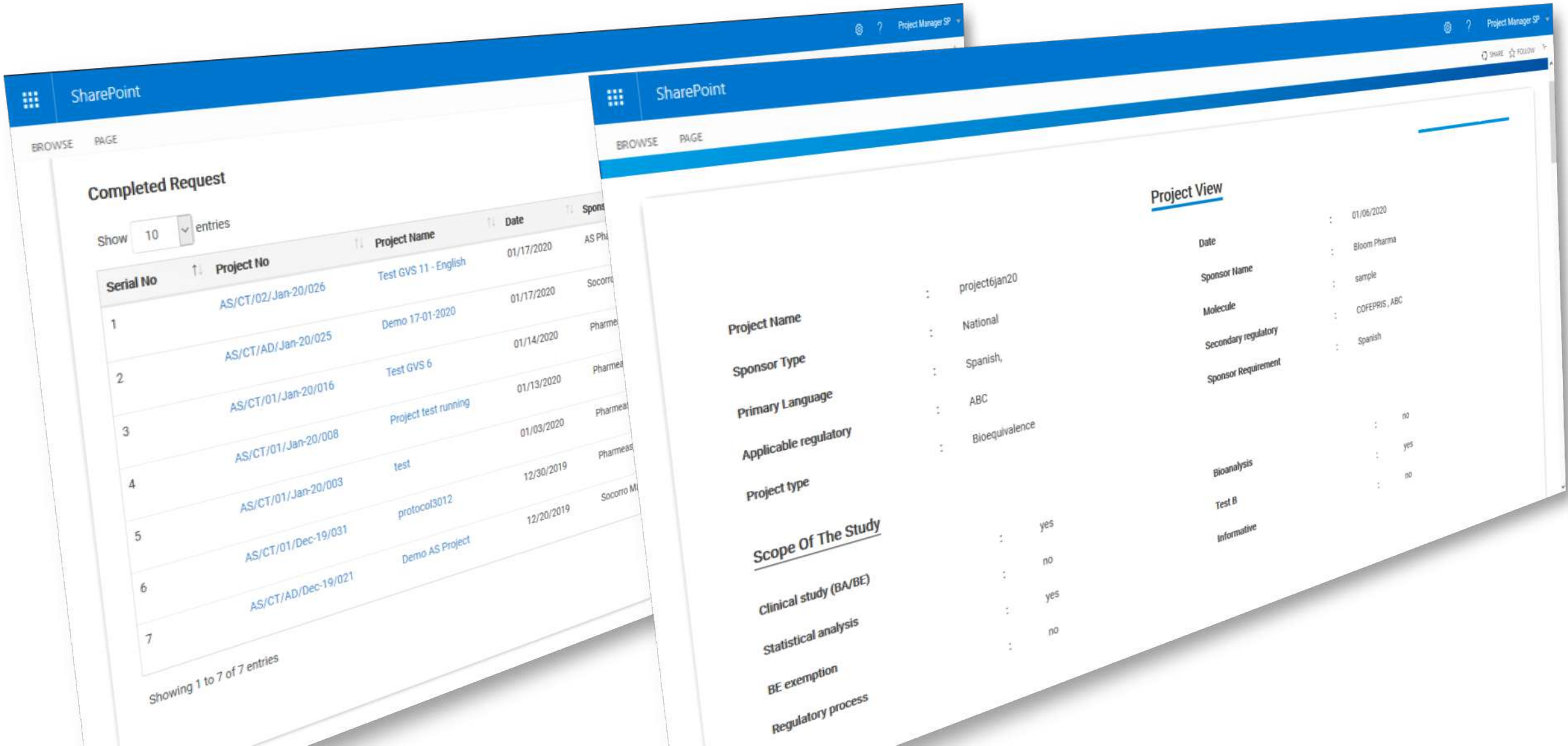

About Bloom

We are a Singapore and India based software development company, specialised in developing web applications and mobile apps for other companies on iOS, Android and Windows Phone, as well as being experts in social applications and API integrations. We are a team of 50+ in-house developers, designers and advisors all passionate about applications.

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