

## Online document sharing system with customized workflow and user management

**Industry:** Clinical research, document management

**Business Objective:** Ability to catalog and access paper and electronic documents on the web

**Background:** Documents that are in the office needed to be accessed in the field and at other locations on an “anytime-anywhere” basis. Client had the business requirements identified

**Solution overview:** A web based system was created that allowed documents (PDF, word docs or scanned images of paper forms) to be uploaded and cataloged. Custom workflow to enable processing of documents created. Complete audit trail of activities maintained. Administrative functionality was available to manage users and user permissions. Users could create groups that had access to the documents uploaded.

### Services rendered:

- Functional specs documentation
- Software system design and development
- Ongoing hosting maintenance and support

### Screen shots:

Document can selected and uploaded into the online system. Users able to view the document or alerted via email when document is uploaded can be selected.

The screenshot displays the 'Online Document Management System' interface. At the top, it says 'Welcome, [redacted] (If you are not Ritu, [click here](#)) [Logout]'. A dark blue sidebar on the left contains navigation links: 'HOME', 'ACCOUNT' (with 'Change Password'), and 'COLLABORATOR' (with 'Share Document' and 'View Documents'). The main content area is titled 'Share Document' and contains a form with the following fields:

- Document Type: A dropdown menu set to 'None' and an empty text input field.
- \* Document Code: A required text input field.
- \* Document Title: A required text input field.
- \* Version: A required text input field.
- \* Effective Date: A required date picker set to '(MM/DD/YYYY)'.
- \* File: A required text input field with a 'Browse...' button.
- \* Description: A required text area with scrollbars.
- \* Select Users for distribution: A dropdown menu with options 'All members', 'User Three', and 'User Two'.

At the bottom of the form, there is a legend '\* = required field' and two buttons: 'Submit' and 'Cancel'.

Repository of uploaded documents can be reviewed.

**Online Document Management System**  
 Welcome, Ritu Sinha (If you are not Ritu, [click here](#)) [[Logout](#)]

**Documents Listing**

Select	Dept.Division	Doc Type	Code	Title	Version	Effective Date	Description
<input checked="" type="radio"/>	IT	GSOP	IT/GSOP/SECU/00	<a href="#">Security &amp; Account Mgmt</a>	v0.2	2007-07-01	security
<input type="radio"/>	IT	GSOP	IT/GSOP/CHGMGT/00	<a href="#">Change Management GSOP</a>	v0.2	2007-07-01	Effective Date: July 1, 2007 Version:

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**HOME**  
**ACCOUNT**  
[Change Password](#)  
**COLLABORATOR**  
[Share Document](#)  
[View Documents](#)

Images of paper forms can be uploaded and the data can be captured in the online data base to enable subsequent searches

**Image Tracking System**  
 Welcome, (If you are not Prachi, [click here](#)) [[Logout](#)]

**Perform Indexing**

Protocol Number: R001    Batch: Site001\_Batch040406

Enter the key identifiers

Form Name\*  [Open](#)

Subject ID\*

Date Form Filled\*  (MM/DD/YYYY)

Visit\*

Page Number\*

Site Code

Investigator ID

Form Type

Form ID

Re-assign priority / DE User etc.

Priority

First Data Entry

Second Data Entry

**Date Time Picker**

April < 2006 >

**April 2006**

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

**HOME**  
**ACCOUNT**  
[Change Password](#)  
**SPONSOR**  
[Set Up Client](#)  
**DATA MANAGER**  
[Setup Protocol](#)  
[Index Batch](#)  
[DE Issues](#)  
[Non-CRF Forms](#)  
[Search Forms](#)

## Search results indicate current status in the prescribed workflow

NT  
Password

OR  
Client

MANAGER  
protocol  
batch  
Batch  
Forms

### Search Results

Found 8 forms

Study Number	Batch Name	Form Name	Form Type	Site Code	Doc ID	Subject ID	Visit	Scanned On	Status
XYZ_P001	Site001_batch00001	<a href="#">Vitals stats</a>	100(CRF)	001		P400-004	V3	2005-11-09 14:13:30.0	Indexed
XYZ_P001	Site001_batch00001	<a href="#">Medication</a>	100(CRF)	002		0003	V3	2005-11-09 14:13:30.0	Indexed
XYZ_P001	Site001_batch00001	<a href="#">img002</a>	100(CRF)	001				2005-11-09 14:13:30.0	Scanned
XYZ_P001	Site001_batch00001	<a href="#">img004</a>	100(CRF)	001				2005-11-09 14:13:30.0	Scanned
XYZ_P001	Site001_batch00001	<a href="#">img005</a>	100(CRF)	001				2005-11-09 14:13:30.0	Scanned
XYZ_P001	Site001_batch00001	<a href="#">img006</a>	100(CRF)	001				2005-11-09 14:13:30.0	Scanned
XYZ_P001	Site001_batch00001	<a href="#">img007</a>	100(CRF)	001				2005-11-09 14:13:30.0	Rescan Requested
XYZ_P001	Site001_batch00001	<a href="#">img008</a>	100(CRF)	001				2005-11-09 14:13:30.0	Rescan Requested

[Back](#)