



Throwing away Excel spreadsheets in favor of smart, sustainable and sophisticated technology.

CASE STUDY

Date:
February, 2019

About Coactive

Coactive builds innovative and intelligent business applications on our proprietary software development platform using rapid application development workflows and technology.

www.gocoactive.com



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The Client

A world leader in serving science, this company has a mission to enable customers to make the world healthier, cleaner and safer. Its focus is helping customers accelerate life sciences research, solve complex analytical challenges, improve patient diagnostics, deliver medicines to market and increase laboratory productivity.

The Challenge

Our client was experiencing what many companies still find challenging to overcome; delays in business workflows and project deliveries caused by document routing and issue management problems. In fact, there was no way to effectively document what was going on in the business, how long a task was left in the hands of any given reviewer, what comments the reviewer had about the issues, and so on. On-site and company-wide leadership were not able to understand where the logjams were nor how to solve them.

Issue management is a process of identifying, reporting and resolving all issues and bugs that impair the progress of a project. Traditionally, this is done by endless and, often, inaccurate spreadsheets. Ensuring that each issue is reported on time, prioritized, logged and appointed to a suitable person who has the optimum set of skills to fix it is extremely difficult and prone to many errors when the technology is not synchronized.

Costs can easily mount up when, for example, small issues are not identified and resolved during the engineering phase when they are still relatively

inexpensive to fix. Instead the issue can get lost and is not rediscovered until down the road when it has become much more expensive and time consuming to resolve.

The Solution

It was immediately clear that what our client needed was an application that could route documentation by opening an issue, attaching a protocol or a specification, routing that to the correct reviewer, allowing for comments, and then assigning it to another reviewer if necessary. In other words, transforming an antiquated paper trail into a much more instantaneous technology workflow.

The capabilities we built in to support this workflow allow users to add other users as well as assign permissions/roles, for example:

- Originator (creator of issues)
- Assigner (reviews open issues and assigns them accordingly)
- Owner (the person who performs a task)
- Verifier (reviews that the work was done correctly and closes the issue)

The app allows an issue to be tracked from open to close; documenting all details throughout the process. Every detail is logged in the system with the date, time, and person.



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One extremely useful functionality we built in is the capability to attach photos. Take an everyday example like when someone is performing a walkdown on a piece of equipment and notices a valve is installed backwards. In the new application the workflow is as follows:

- They can take a picture of the problem
- Create an issue
- Attach the image to the issue and describe the issue
- The issue then goes into the “unassigned” queue where a reviewer assigns it to the applicable person to fix
- Then, the person assigned to fix the problem would do so and take another picture, upload it to the issue and describe the corrective action
- The assigned person then closes the issue, where it goes into the review queue
- An authorized reviewer will verify that the issue was resolved by reviewing the photo and corrective actions

The result in this case that it has eliminated the need for someone to go back out into the field, in person, to verify the fix. Instead the picture can be used to verify completion of the issue.

Resolved issues are kept in a perpetual archive and reports can be created to see the trail and all the resolved issues, etc. Reports can even be attached to protocols for audits to show the trail of resolution. An assignee can also decline an issue that has been incorrectly assigned to them meaning the issue can be

quickly reassigned and not left hanging. This puts the issue back in the review queue much faster than before. This app is completely customizable but can also serve as a baseline for apps with more/different capabilities. Some features have already been built in that aren't yet being used but can be turned on when needed.

The Results

This simple application can be used for just about any business process and any type of project management. With this app, users can quickly understand the problem and how to resolve it either from their desktop or their mobile. Now that identifying the problem and delivering a solution can be done remotely, the business experiences significant improvements to the flow and efficiency of the project.

With improved issue resolution metrics, this app removes the need for antiquated paper documentation or even legacy spreadsheets, now all the data is stored and made available through secure and collaborative cloud technology.

Now that users can access, analyze and understand their data more accurately with this app, critical decision making is smoother, and projects are delivered more quickly.

Speed to market for a project or process is key to our client's success. When they accelerate problem resolution and increase the quality of decision making through collaboration and accountability, they drive efficiencies up and get an edge over their competitors.