

Case Study - SharePoint PMAP (Promotional Material Approval Process)

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1. Client

The client is a major pharmaceutical company with operations worldwide.

2. Requirement

The client had an existing process of getting the promotion material approved through emails and discussion was held on phone. This was a cumbersome process and involved a lot of time. A system was required that could help the concerned people to get the material approved soon and take it forward for promotion.

3. Solution Approach

3.1 System Overview

PMAP stands for Promotional Material Approval Process. The system is designed to handle all promotional material approval processes across Asia Mid Size including submission, review, approval, tracking and archiving of the materials. It also allows Regional and Country level Managers to submit their promotional materials for approval from Local Regulatory / Medical Director without the constraint of time or physical distances, reduces the use of paper and promotes efficient communication.

3.2 Features of the website

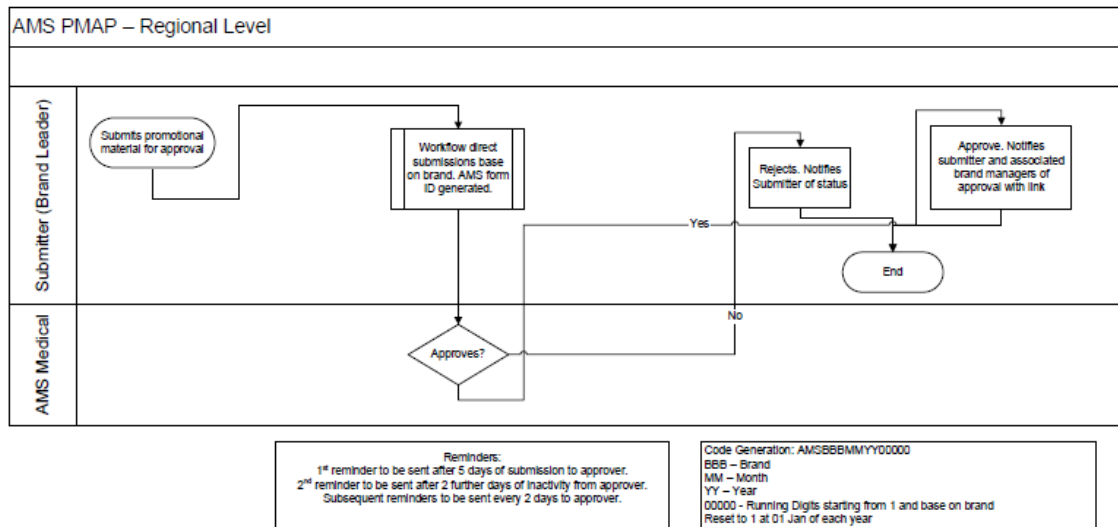
1. User Friendly Interface.
2. Only authorized users can access the site.
3. Approval Matrix organized in the site itself.
4. Automatic email generation with the link of approval form for easy access.
5. Authorized area of the form is available to logged in user.
6. Configurable parameters (Submitters, Director, Local regulatory, email content, email body etc).
7. Users are coming from Active Directory.
8. Automatic reminder for pending approvals.

3.3 System Architecture

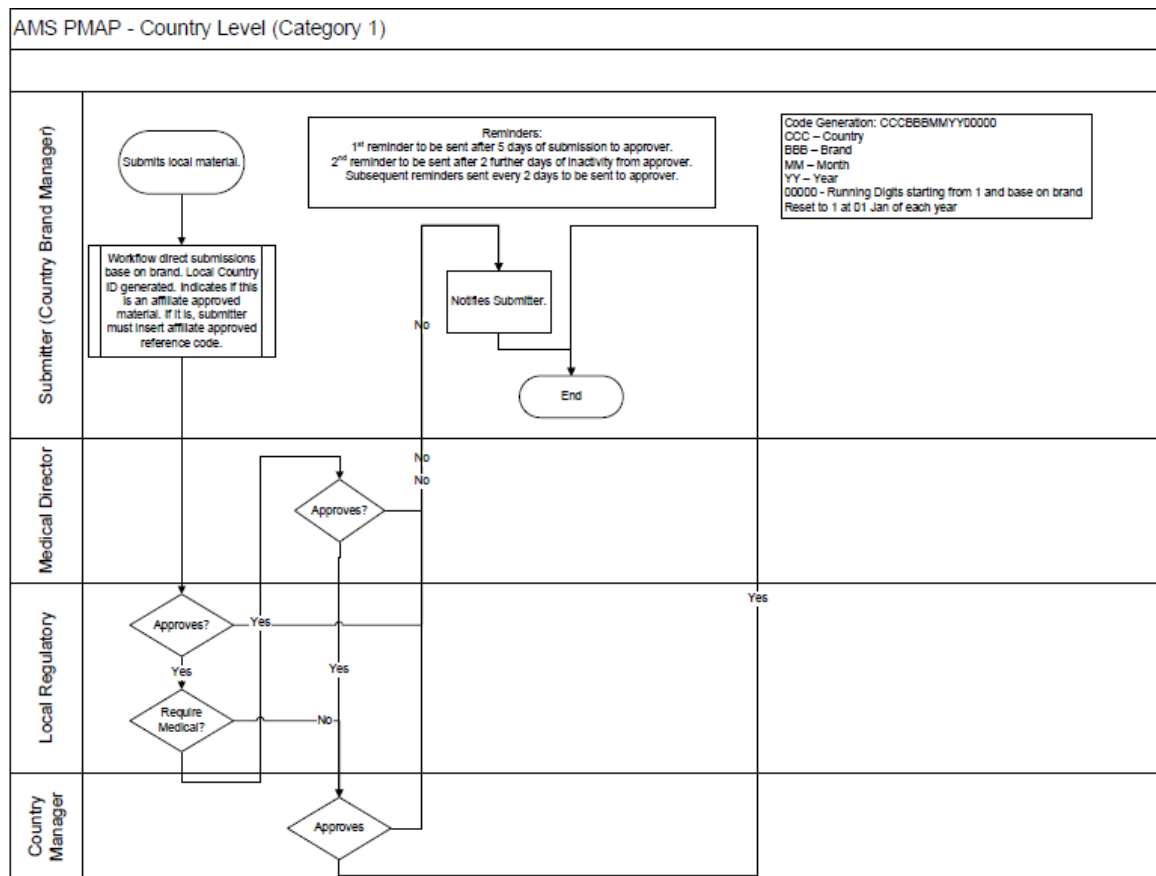
1. System architecture is defined in MOSS 2007.InfoPath 2007 for UI design.
2. SharePoint workflow designer for system workflows.Active Directory for User configurations

4. Interface Diagram

1. Regional Level



2. Country Level (Category 1)



5. Site map

Site is divided into two parts:

1. Regional Level: This site is for submitting the request for promotional material for the approval at regional level. Only Medical Director approval is request in this site. One the medical director approves the request, its get completed. User can upload the same material to country site.
2. Country Level: This site is for submitting the request at country level. Approval process depends on the category of the product. Please refer the flow diagram (in the interface diagram) for more details.

6. Some of Screen designs

Regional Level:

PROMOTIONAL MATERIAL APPROVAL

Regional Status: New

Submitter Information - Regional

Name: Surender . Yadav - LillyCollab
Email ID: Surender.Yadav@kmgm.com
Date of Submission: 3/16/2011
Region: AMS

Promotional Material Information

Product Name: Alinta
Category: 1
Category-Promo Item: Detail Aid / Leave behind
Description:

Attach a file OR Specify Network Location
Click here to attach a file
Click here to attach another file
OR
Specify Network location for file(s)

Submit - Regional Save Reset Close

The submitter fills in the required fields like:

- A - Selects the product
- B- Select Category
- C - Based on Category Selected choose Category Promo Item
- D - Enter the description as required
- E -Also the submitter has an option of attaching any file in the form. (File size less than 10 MB, if its greater than 10MB then the URL is provided)
- F -Submit the request

Country Level:

PROMOTIONAL MATERIAL APPROVAL

Regional Status: Approved by Medical Director Country Status: Upload to Country for Changes

Submitter Information - Regional

Name: Pawan Arora
Email ID: Surender.Yadav@kmgn.com
Date of Submission: 3/9/2011
Region: [Dropdown]

Submitter Information - Country

Name: Pawan Arora
Email ID: Surender.Yadav@kmgn.com
Date of Submission: 3/10/2011
Country: Hong Kong A

Promotional Material Information

Product Name: [Dropdown]
Category: [Dropdown]
Category-Promo Item: [Dropdown]
Description: [Text Area] B

Attach a file OR Specify Network Location

C
 Click here to attach another file
OR
[Specify Network Location for file\(s\)](#)

Country Updates

Affiliate approval Code (Regional): AMSA1020111000
Has the promotional material been modified after Regional Approval? Yes No

Audit Log Information

Show Audit Log D

E

The submitter fills in the required details.:

- A - Selects the Country
- B - Enter Description
- C - Attach any file if required (Max size 10 MB, if greater than 10 MB the link to the file is provided)
- D - Audit Log Information
- E - Submit at country.