

Overcoming hurdles in clinical programming project management using Microsoft Teams



Sofie Cambré, Yan Wu

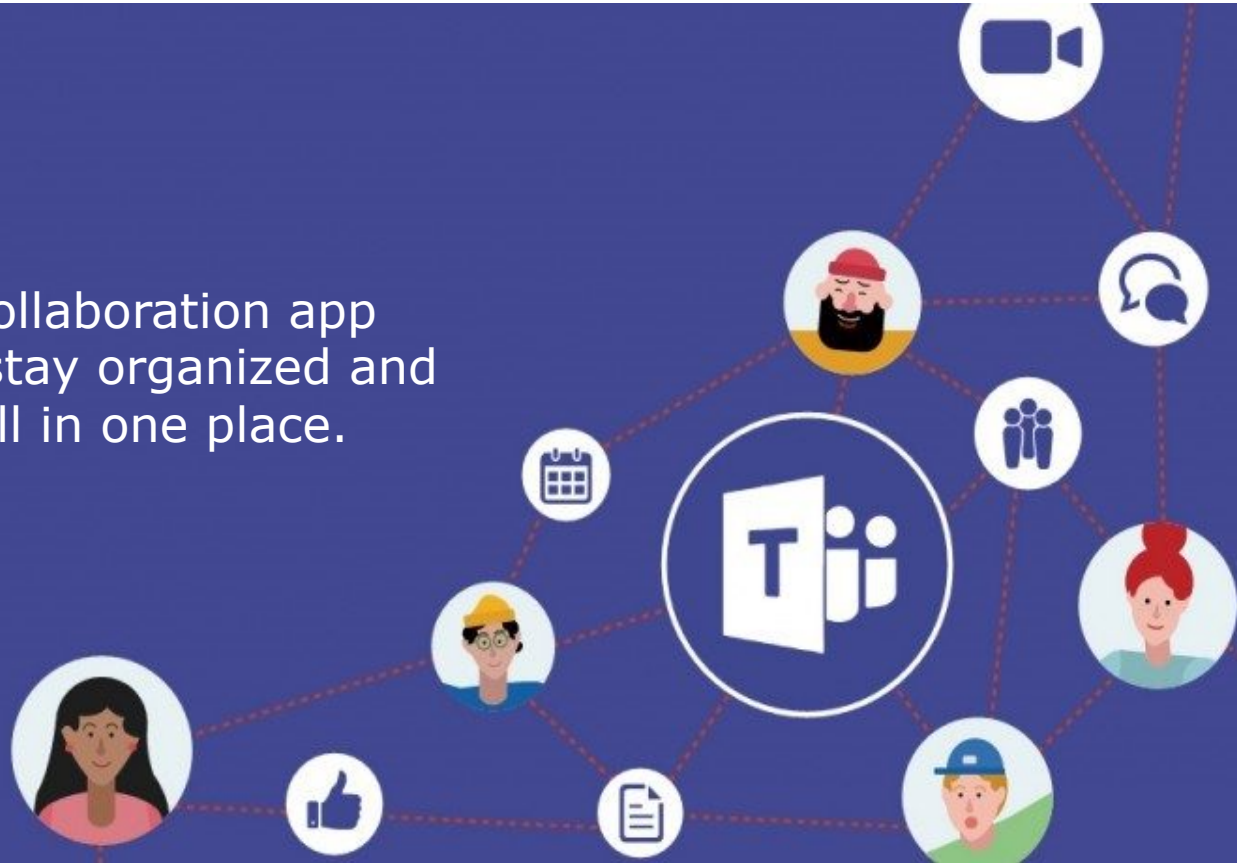
September 2019

Agenda

- Hurdles?
 - communication
 - Planning
 - collaboration
- How we use MS Teams to tackle the hurdles?
- Benefits & Challenges.
- Recommendations for prospective users.



Microsoft Teams is a collaboration app that helps your team stay organized and have conversations—all in one place.



Hurdles in Clinical Programming Projects Management



Communication hurdles



- Multiple communication platforms.
- Excessive email.
- Tracking and filtering emails/messages.

Planning hurdles

- Plan deliverables, work assignments.
- Track status.
- Keep eye on big picture.



Collaboration hurdles



Tedious document sharing/review using emails.

Time-cost: Cross checking document over multiple tools/platforms

Lacking central workplace for document collaboration and information sharing.

MS Teams main features & capabilities

Effective communication

- ✓ @mentions
- ✓ Channel favoriting & following
- ✓ Chat/instant messaging
- ✓ Online meeting/call/Conf
- ✓ Contact search by name or email address
- ✓ Conversation search & tracking

Integration

- ✓ Group chat
- ✓ Meeting scheduling
- ✓ Notes
- ✓ Sync with Outlook
- ✓ Document storage
- ✓ Tabs for frequently used documents
- ✓ Third-party integrations
- ✓ Usage reports

Customizable

- ✓ Access control
- ✓ Organization wide teams
- ✓ Customizable alerts
- ✓ Customizable for each team
- ✓ Team chats & private discussions
- ✓ Teams overview grid
- ✓ Office 365 & custom connectors

Communicate

- Chat - private - individual or group - automatically saved

The screenshot displays the Microsoft Teams chat interface. On the left sidebar, the 'Chat' icon is highlighted. The main window shows a chat conversation with 'Joshi, Nirved [JRDUS]'. The interface includes a search bar at the top, a list of recent contacts on the left, and a chat history on the right. A file named '4_1_draft.PNG' is shared in the chat. The bottom of the screen shows a text input field and a send button. Red boxes and arrows highlight specific features: 1. Chat Room (points to the chat icon), 2. Start Chat (points to the 'Start Chat' button), 3. Edit text, attach files, send emojis (points to the text input field), 4. Send message (points to the send button), 5. Loop more people into conversation (points to the 'Add people' button), 6. Video/Audio calls and Screen sharing (points to the call and screen sharing icons), and 7. Files you have shared are saved in the 'File' tab (points to the 'Files' tab).

1. Chat Room

2. Start Chat

3. Edit text, attach files, send emojis

4. Send message

5. Loop more people into conversation

6. Video/Audio calls and Screen sharing

7. Files you have shared are saved in the 'File' tab

Communicate

- Conversations – public - on a **specific topic/channel**.

The screenshot displays the Microsoft Teams interface for a channel named 'CLINICALTRIAL1001'. The left sidebar shows the 'Conversations' tab selected, with a red box and arrow labeled '1. Conversation tab'. The top search bar is highlighted with a red box and arrow labeled '3. Search function'. The main chat area shows a message from 'Wu, Yan [JRDBE]' mentioning 'Cambre, Sofie - Statistical Programming [JANBE]' with a red box and arrow labeled '2. Notification with @mentions'. A context menu is open over the message, showing options like 'Save this message', 'Mark as unread', 'Copy link', 'Immersive Reader', and 'Turn on notifications', with a red box and arrow labeled '4. Bookmark' pointing to the 'Turn on notifications' option. The interface includes a top navigation bar with a search bar and a left sidebar with navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Help.

Communicate

- Conversations - Discussions with team members on a **specific file**

The screenshot displays a Microsoft Teams window with a file 'text_inventory.xlsx' open. The file is a spreadsheet titled 'Standards Document Inventory for Trial Use'. The chat on the right shows a conversation about the file's review status.

Document Description	Topic	File Name	Effective From	Effective To	Notes
Consolidated Protocol Content	Global	Protocol_Global_02JUN2016.docx	02/06/2016		
Consolidated SAP Content	Global	SAP_Global_14OCT2016.docx	14/10/2016		
Consolidated DPS Content	Global	DPS_Global_14OCT2016.docx	14/10/2016		
Protocol Content	Mood Disorders	Protocol_MD_18MAR2016.docx	18/03/2016		
SAP Content	Mood Disorders	SAP_MD_18MAR2016.docx	18/03/2016		
DPS Content	Mood Disorders	DPS_MD_18MAR2016.docx	18/03/2016		
Protocol Content	Pain - Osteoarthritis	Protocol_PAI_13MAY2016.docx	13/05/2016		
SAP Content	Pain - Osteoarthritis	SAP_PAI_13MAY2016.docx	13/05/2016		
DPS Content	Pain - Osteoarthritis	DPS_PAI_13MAY2016.docx	13/05/2016		
Protocol Content	Prostate Cancer	Protocol_PC_18MAR2016.docx	18/03/2016		
SAP Content	Prostate Cancer	SAP_PC_22DEC2016.docx	22/12/2016		
DPS Content	Prostate Cancer	DPS_PC_18MAR2016.docx	18/03/2016		
Protocol Content	Psoriasis	Protocol_PSO_18MAR2016.docx	18/03/2016		
SAP Content	Psoriasis	SAP_PSO_18MAR2016.docx	18/03/2016		
DPS Content	Psoriasis	DPS_PSO_18MAR2016.docx	18/03/2016		
Protocol Content	Rheumatoid Arthritis	Protocol_RA_18MAR2016.docx	18/03/2016		
SAP Content	Rheumatoid Arthritis	SAP_RA_18MAR2016.docx	18/03/2016		
DPS Content	Rheumatoid Arthritis	DPS_RA_18MAR2016.docx	18/03/2016		
Protocol Content	Myelodysplastic Syndromes	Protocol_MDS_02DEC2016.docx	02/12/2016		Provisional final; ADaM met development in-progress
SAP Content	Myelodysplastic Syndromes	SAP_MDS_02DEC2016.docx	02/12/2016		Provisional final; ADaM met development in-progress
DPS Content	Myelodysplastic Syndromes	DPS_MDS_02DEC2016.docx	02/12/2016		Provisional final; ADaM met development in-progress
Protocol, SAP, and DPS Content	Virology (Resistance Analysis)	Upon Request	08/03/2017		Preliminary draft StatReqs a being tested on pilot studies Janssen for further details (kianss23@its.jnj.com)

Chat conversation:

16:09
text_inventory....

16:16 Edited
Thank you for all input. Is it ready for review now?

Wu, Yan [JRD8E] 16:16
yes, this is ready for review version

16:18
Great! Team will be happy 😊

Wu, Yan [JRD8E] 16:18
Glad to hear that!

2. Conversation Text

1. Text box

Communicate

- **Meetings** - Integrated with **Outlook** calendar - **audio/video** conferences with **recording** feature

The screenshot shows the 'New meeting' dialog in Microsoft Teams. The interface includes fields for Title, Location, Start, End, Repeat, and a Details section with a rich text editor. On the right, there are options to 'Select a channel to meet in', 'Invite people', and 'Organiser'. Red boxes and arrows highlight specific features: 'Add subject/title' points to the Title field; 'Select appropriate channel for your meeting.' points to the channel selection dropdown; 'Option for specifying physical location.' points to the Location field; 'Helps the organizer browse availability on all attendees' calendars.' points to the 'Scheduling assistant' link; and 'If you select a specific channel, only members of the team can be invited. Otherwise anyone in the organization can be invited.' points to the 'Invite people' section. The 'Organiser' field shows 'Cambre, Sofie - Statistical Progr...' with email 'scambre3@its.jnj.com'. At the bottom, there is a note 'This is a Microsoft Teams online meeting. Everyone can join online.' and buttons for 'Close' and 'Schedule'.

New meeting ▾

Add subject/title

Select appropriate channel for your meeting.

Title
Kick-off meeting

Select a channel to meet in
CLINICALTRIAL1001/Efficacy ▾

Location
▾

Start
19 Jul 2019 08:30

End
19 Jul 2019 09:00

Repeat ☐

Option for specifying physical location.

Option for specifying physical location.

Helps the organizer browse availability on all attendees' calendars.

If you select a specific channel, only members of the team can be invited. Otherwise anyone in the organization can be invited.

Details
Type details for this new meeting

Scheduling assistant

Invite people
Invite someone

Organiser
Cambre, Sofie - Statistical Progr...
scambre3@its.jnj.com

This is a Microsoft Teams online meeting. Everyone can join online.

Close Schedule

Figure 2.3 Setting up a new meeting in MS Teams

Communicate

- **Meetings** - record functionality - meeting notes

The screenshot displays a Microsoft Teams interface for a channel named 'CLINICALTRIAL1001'. The top navigation bar includes 'Conversations', 'Files', 'Meeting Notes' (selected), 'Wiki', and 'Planner (ToDoList)'. A 'Private' status indicator is visible in the top right. On the left sidebar, a list of items under 'test meeting 3' includes '1. Notes', '2. Test meeting minutes', and '3. Notes'. The main content area shows the details for 'test meeting 3', which was last edited on 6/14. It features two sections: 'Notes' and 'Test meeting minutes'. The 'Test meeting minutes' section contains the following text: 'To check if the meeting minutes will be saved in the CLINICALTRIAL1001 team / general channel', 'Great! It works :-)', and 'So everyone is up-to-date about this meeting between Wu, Yan [JRDBE] and Cambre, Sofie - Statistical Programming [JANBE]'. Below this, there is another 'Notes' section.

What do we like?

- Chat history is **archived**.
- Specific **chat rooms** and **share files**.
- **TAG people (@mentions)**
- Simple way to communicate **around specific documents**
- **Search functionality & bookmarks**
- Meetings setup/recording/minutes

Plan

- **Planner** - Gives you the ability to **setup specific tasks**.
 - **Integrated with outlook** and sends assignment notices and reminders.

The screenshot displays the Janssen Planner (ToDoList) interface. On the left, a sidebar shows a list of programs: ADEX, ADAE, and ADSL, each with a user icon and name. The main area shows a task card for 'Safety outputs' assigned to 'Joshi, Nirved [JRDUS]'. The task is in the 'TLF's' bucket, 'In progress' status, with a start date of '06/10/2019' and a due date of '06/14/2019'. The description is 'Program safety tables and listings and deliver statisticians to review ASAP'. Below the description is a checklist with four items: 'TSFAE01', 'TSFAE02', 'LSFAE01', and 'LSFAE02'. The first two are checked. An 'Add attachment' button is at the bottom. On the right, a vertical bar shows multiple color labels, with 'Label 4' highlighted in green. Three red boxes with arrows point to specific features: 'Set progress status, assign dates and add description' points to the task header area; 'Multiple color labels' points to the vertical bar; and 'Create checklist of sub-tasks' points to the checklist items.

Planner (ToDoList)

Board | Charts | Schedule

Programs

ADEX
06/24

YY Yan, Yingying [JRDUS]

ADAE
06/18

CS Cambre, Sofie - Statistical Pr...

ADSL
06/19

TM Tiwari, Miten [JRDUS]

Safety outputs
Last modified 34 minutes ago by you

JN Joshi, Nirved [JRDUS]

Bucket: TLF's | Progress: In progress | Start date: 06/10/2019 | Due date: 06/14/2019

Description: Program safety tables and listings and deliver statisticians to review ASAP

Checklist 2 / 4

- ☐ TSFAE01
- ☒ TSFAE02
- ☐ LSFAE01
- ☒ LSFAE02
- ☐ Add an item

Attachments
Add attachment

Filter (0) | Group by Bucket

Label 4

Set progress status, assign dates and add description

Multiple color labels

Create checklist of sub-tasks

Figure 3.1 : Creating a new task using Planner.

Sample 'Board' view of Planner

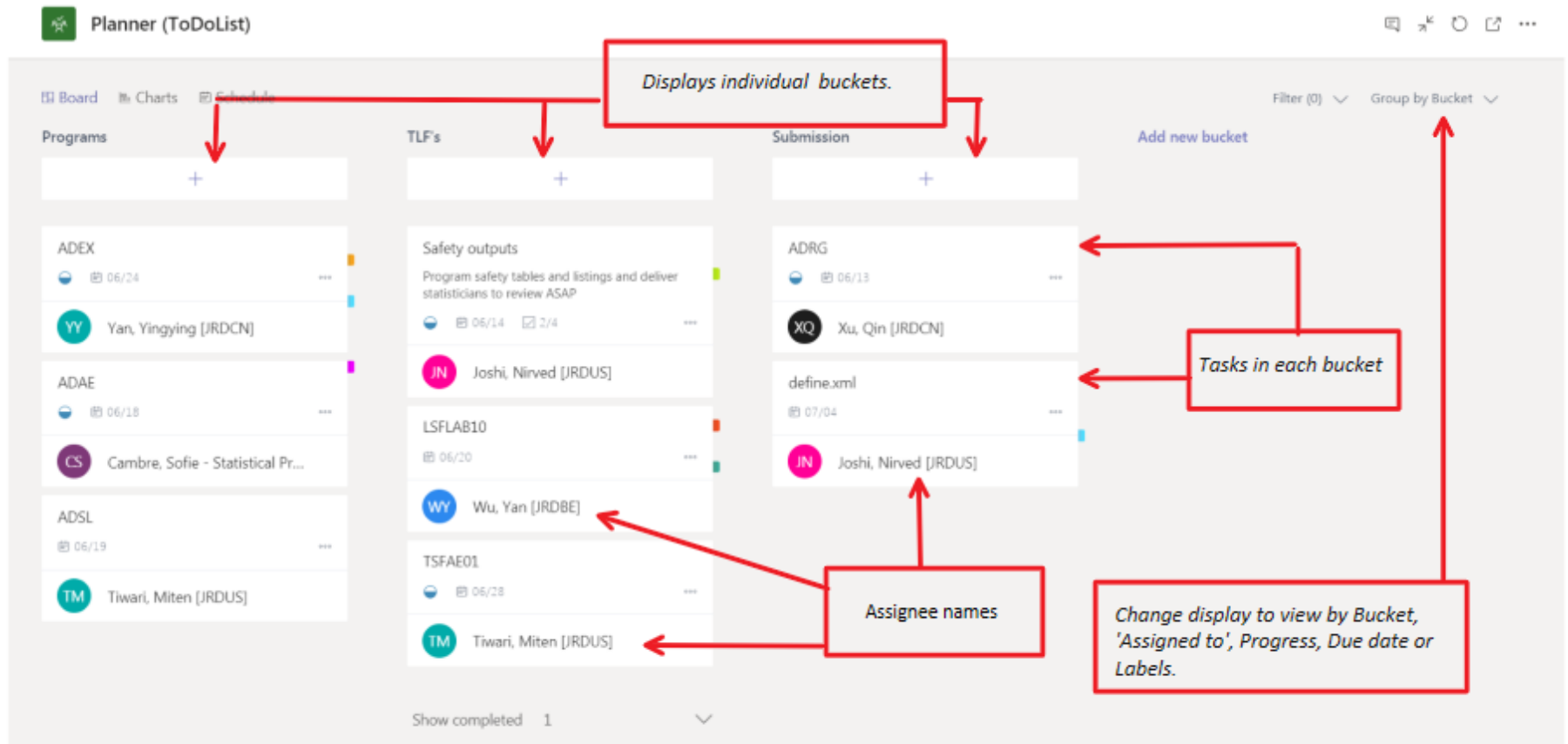


Figure 3.2 : Board view of the Planner.

Sample 'Charts' view of Planner

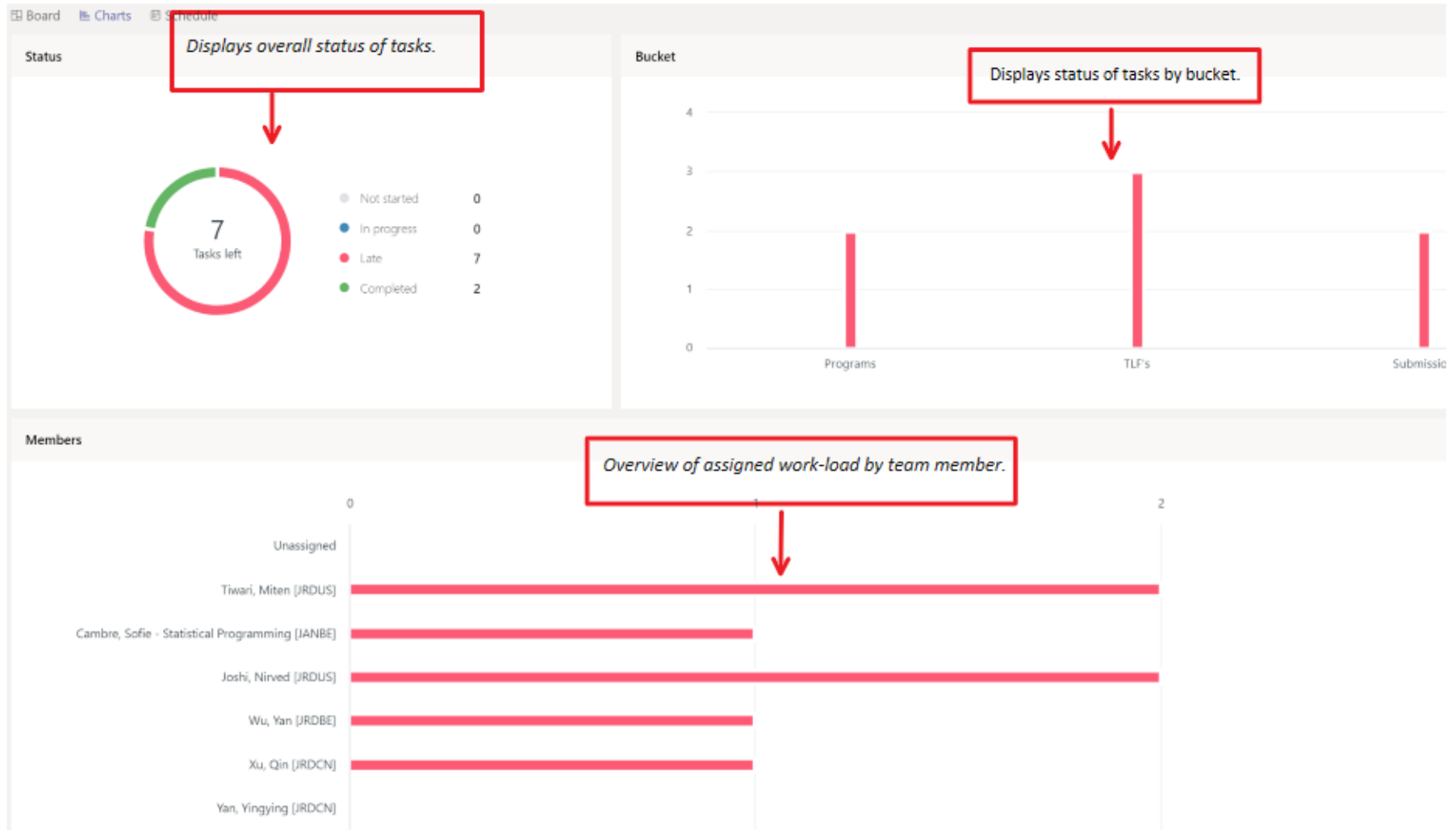


Figure 3.3: Chart view of the Planner.

Sample 'Schedule' view of Planner

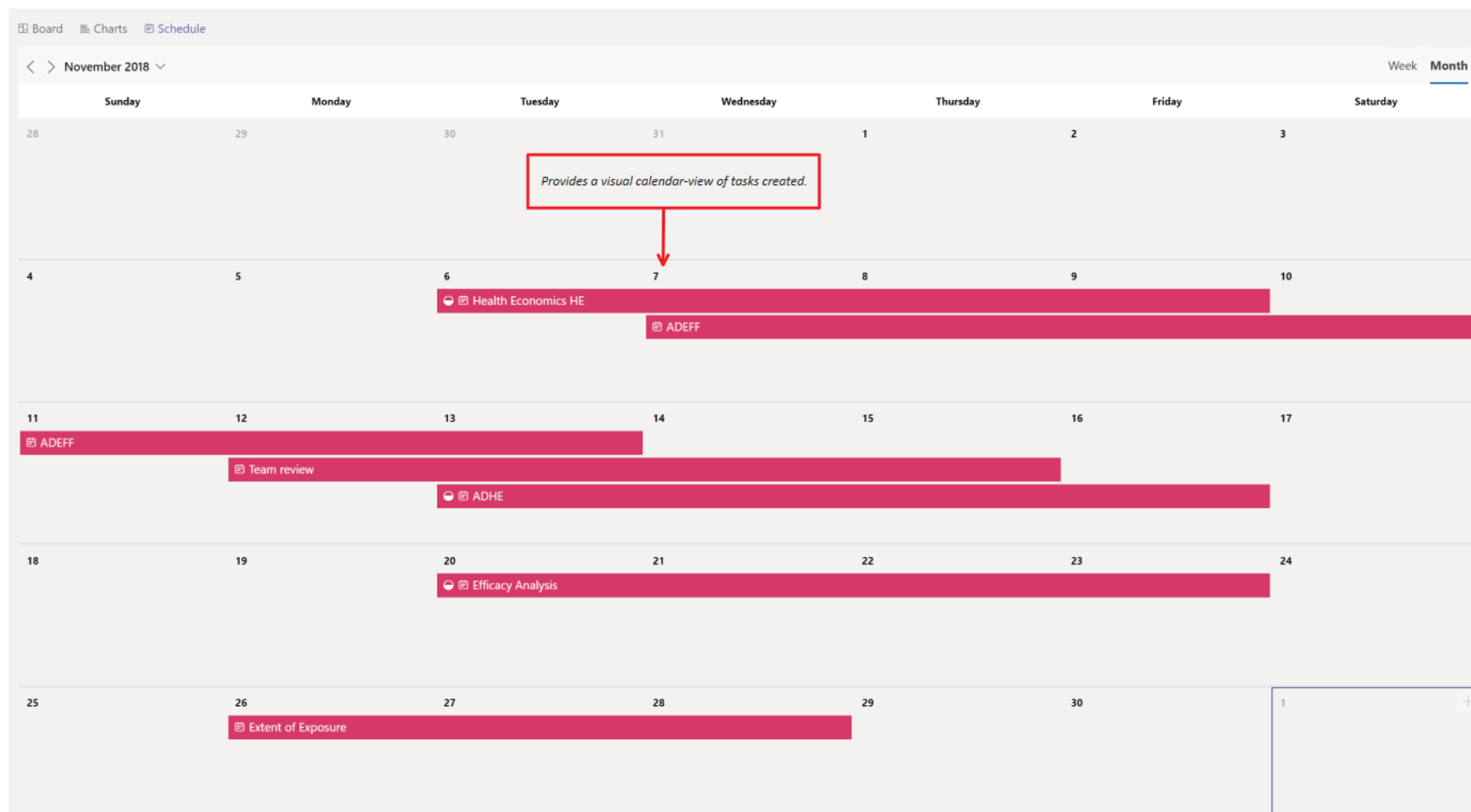


Figure 3.4: Calendar view of the Planner.

What do we like?

- Setup specific tasks and grouped by 'buckets'
- High level visual presentation
- Reduces meeting time
- Assignment notices and reminders
- Information conveyed only to the specific person of interest

Collaborate

- **Document repository** - **Eliminates scattered information** in emails as attachments, DOC folder on your desktop

The image displays two screenshots of the Microsoft Teams interface, illustrating a document repository for the 'CLINICALTRIAL1001' team.

Top Screenshot: General Channel

The 'General' channel is selected. The 'Files' tab is highlighted with a red box. A red box labeled 'Commonly used trial documents' points to the file list.

Type	Name	Modified	Modified by	Size
Folder	Email Messages	6/6/19	SharePoint App	
Excel	vTMF content map_clinicaltrial1001_panel1.xlsx	1m ago	Wu, Yan [JRDBE]	18.00 KB
Excel	Clinicaltrial1001_DryRun_Metrics.xlsx	3m ago	Wu, Yan [JRDBE]	111.83 KB
Excel	Communication_Tracker_CRO.xlsx	3m ago	Wu, Yan [JRDBE]	20.16 KB
Excel	text_inventory.xlsx	4m ago	Wu, Yan [JRDBE]	37.87 KB
Excel	adam_metadata_inventory.xlsx	5m ago	Wu, Yan [JRDBE]	19.81 KB

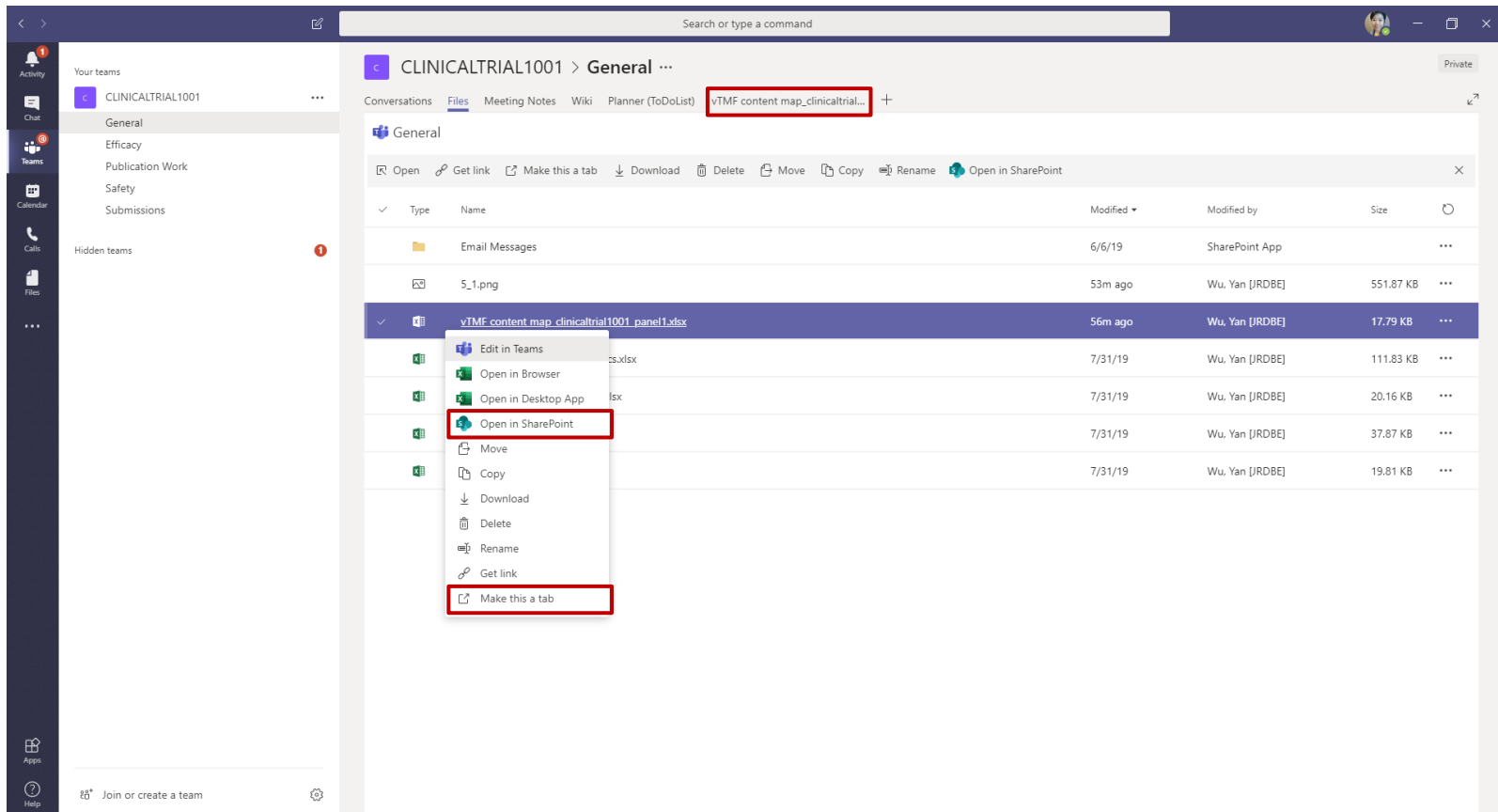
Bottom Screenshot: Efficacy Channel

The 'Efficacy' channel is selected. The 'Files' tab is highlighted with a red box. A red box labeled 'Documents specific to domains or tasks' points to the file list.

Type	Name	Modified	Modified by	Size
Excel	List of reports.xlsx	8m ago	Wu, Yan [JRDBE]	16.25 KB

Collaborate

- **Document sharing** - All files to be **shared** with the team are stored in 'Files'.
 - Use **link** or share a document as a '**tab**' or upload in **SharePoint**.



Collaborate

- Real time co-authoring - **Edit** documents (word, excel etc.) within the app or online with **autosave** feature

The screenshot displays the Microsoft Excel Online interface. The main window shows a spreadsheet titled 'List of reports.xlsx' with a green header bar. The ribbon includes tabs for File, Home, Insert, Data, Review, View, and Help. The 'Home' tab is active, showing options for Paste, Clipboard, Font, Alignment, Number, Tables, and Cells. The spreadsheet data is as follows:

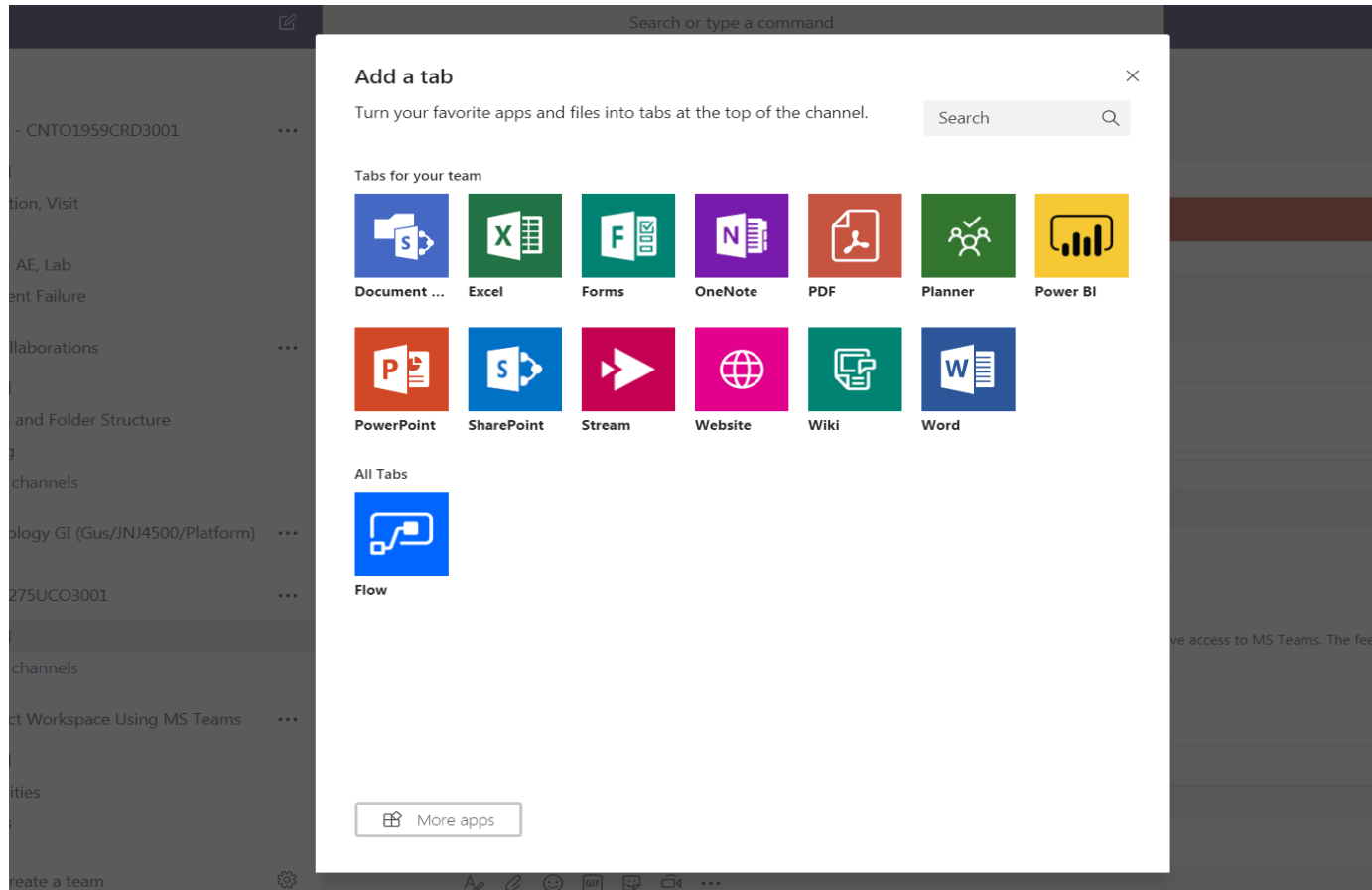
	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Programmer	QC	Status									
2	tsfae02_ds	Shangyou	Rajini	in processing									
3	lsfae10_ds	Shangyou	Rajini	done									
4	lsfae11_ds	Shangyou	Rajini	done									
5	lsfae12_ds	Shangyou	Rajini	done									
6	lsfae13_ds	Shangyou	Rajini	done									
7	lsfae14_ds	Shangyou	Rajini	in processing									
8													
9													
10													
11													
12													
13													
14													

The chat sidebar on the right shows a conversation with 'Cambre, Sofie - Statistical Programming [JANBE]'. The status indicates '1 person is available'. The chat area contains the text: 'Chat with people editing this file in Office Online. This chat won't be saved when you close the file.' The bottom of the sidebar has a text input field 'Type a message here' and a smiley face icon.

- Identify Contributor
- Control
- Transparency
- Flexibility

Collaborate

- **Microsoft Apps** - **Access** to multiple **Microsoft features** Excel, OneDrive, OneNote, SharePoint etc. along with third party apps within MS Team

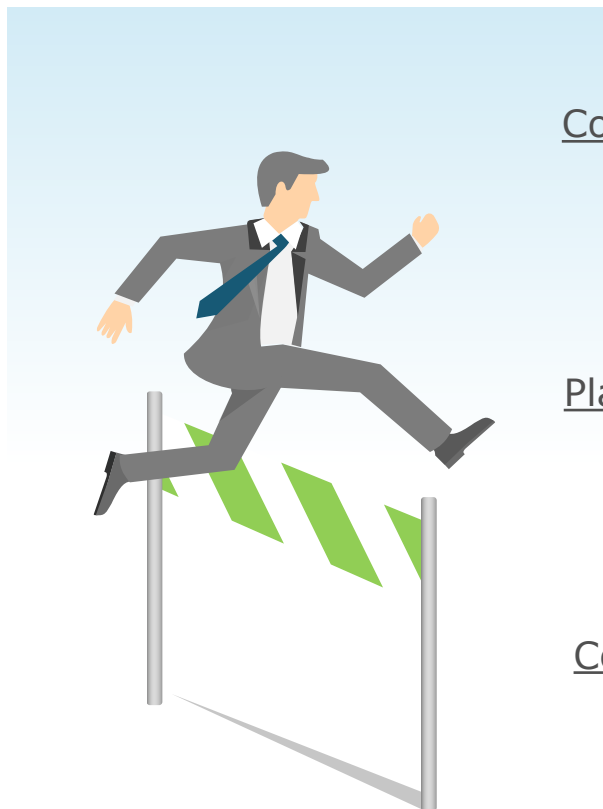


What do we like?

- Prioritize time better
- Avoid getting side-tracked (Easy access to meta-document)
- Boost-up team document collaboration
- Cloud based – mobility/ transparency/ flexibility
- Integration with third-party Apps

Microsoft Teams

Team collaboration just got easier!



Communication Solution:

IM/group chat with search and bookmarks
Topic Specific conversations, **tagging** support
Online meetings, callings and web conference

Planning Solution:

'Planner' app for efficient assignment
Sending **Reminders** to team
Graphical/Calendar view of work load

Collaboration Solution:

Allows **multiple co-authoring**
Document specific conversation
Cloud based **document repository**

Benefits & Challenges



BENEFITS

- Cross-functional teams more productive.
- Powerful communication and collaboration tools.
- Keep focus on essential information.
- Fully integrated with Office 365 services.

CHALLENGES



- Learning curve.
- Clearly defined rules
- Certain capabilities are under development.

Recommendations

- Teams can be part of the kick-off meeting.
- Asking commitment from each team member.
- Fit for : initiatives, working groups, clinical trial dry runs, submissions, et al.
- MS Teams is generally more effective if immediate cross-functional teams are on board.
- MS Teams can be very effective in day-to-day communication but would need a formal document management/archival plan for important documents.

Acknowledgement

Bev Hayes

Donald Paterson

Gayathri Kolandaivelu

Jennifer Montello

Jiyun Cai

Madeline Masucci

Mark Bynens

Miten Tiwari

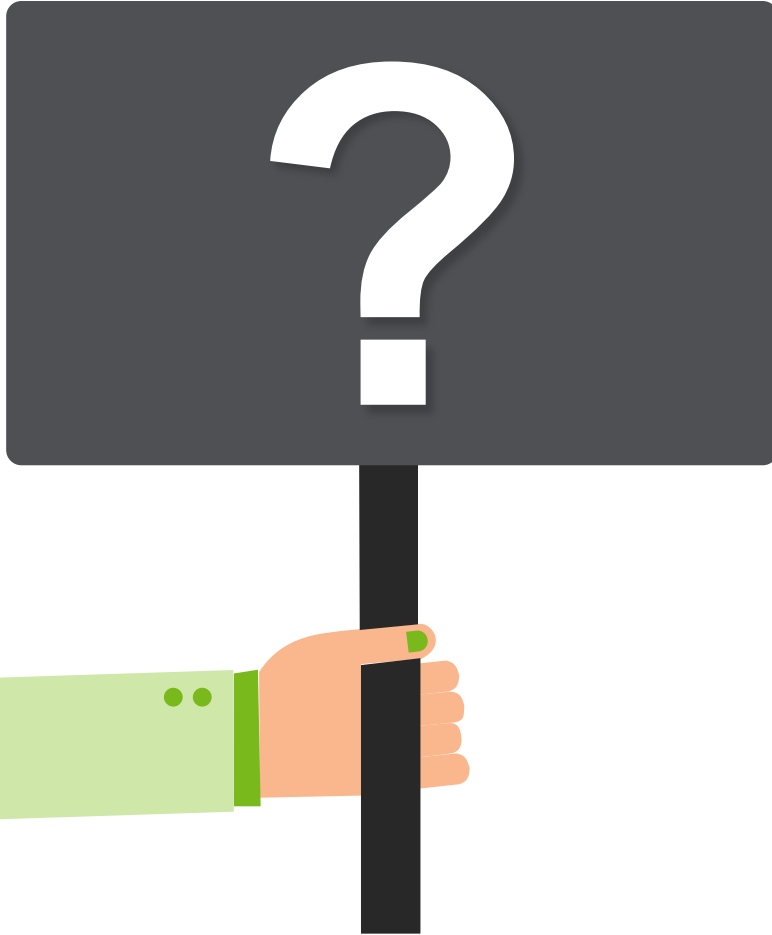
Nirved Joshi

Qin Xu

Renu Shukla

Steven Haesendonckx

Yingying Yan



Any Questions