

Re-Inventing The Deliverable Tracker – From Excel to Dashboard

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VeraMed



Introduction

What is a deliverable tracker?



Project planning

Communication
and collaboration

Resource allocation



Deliverable lifecycle
management

Compliance and
documentation

Quality control

What is the problem we are trying to solve?



HAVES

Standalone

Manual

Static

Integrate

Automate

Accelerate

WANTS

Connected

Automated

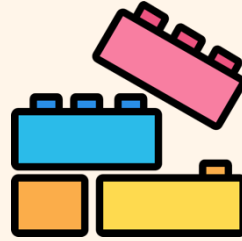
Scalable

What is the problem we are trying to solve?



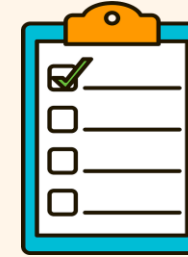
- Utilise information available within the SCE

Integrate



- Automate repetitive tasks
- Git abstraction

Automate



- Make task management less tedious
- Scalable deployments

Accelerate

The background features a dark teal base color. Overlaid on this are several abstract shapes: a large, light blue rounded shape in the upper center, a smaller light blue circle in the lower right, and two elongated, pointed shapes in a light pink color on the left side. The text 'Available Trackers' is centered in white.

Available Trackers

Excel Trackers



A	B	C	D	E	F	G	H	J	K	L	M	N	O	P	Q	
1		ADaM														
2			Running			Active	Active	# Open QC	# Open Client					P21 Validation	QC Complete	
	ID	Program	Order	Specification Notes	Status	Role	Person	Comments	Comments	PP	QP	QC Method	QC Program	Date Time	Date Time	
3	ADSL	adsl	1		Coding	PP	TB	0	0	SB, TB	MH		q_adsl			
4	ADEX	adex	2		QC ready	QP	MH	0	0	SB	MH		q_adex			
5	ADAE	adae	2		Issues	PP	SB	0	0	SB	MH		q_adae			
6	ADMH	admh	2		Updated	QP	MH	0	0	SB	MH		q_admh			
7	ADVS	adv	2		Passed QC	Reviewer	Reviewer	0	0	SB	MH		q_adv			
8	ADCM	adcm	2		Passed high level review	Client	Client	0	0	SB	MH		q_adcm			
9	ADLB	adlb	2		Approved	(no one)	(no one)	0	0	SB	MH		q_adlb			
10	ADQS	adqs	2		Withdrawn	(no one)	(no one)	0	0				q_adqs			
11	ADTTE	adtte	3		Do not start	(no one)	(no one)	0	0				q_adtte			
12																
13																



Familiarity
Flexibility
Offline Access
Quick Setup



Manual Updates
Lack of Integration
Version Control Issues
Scalability
Assignment Management

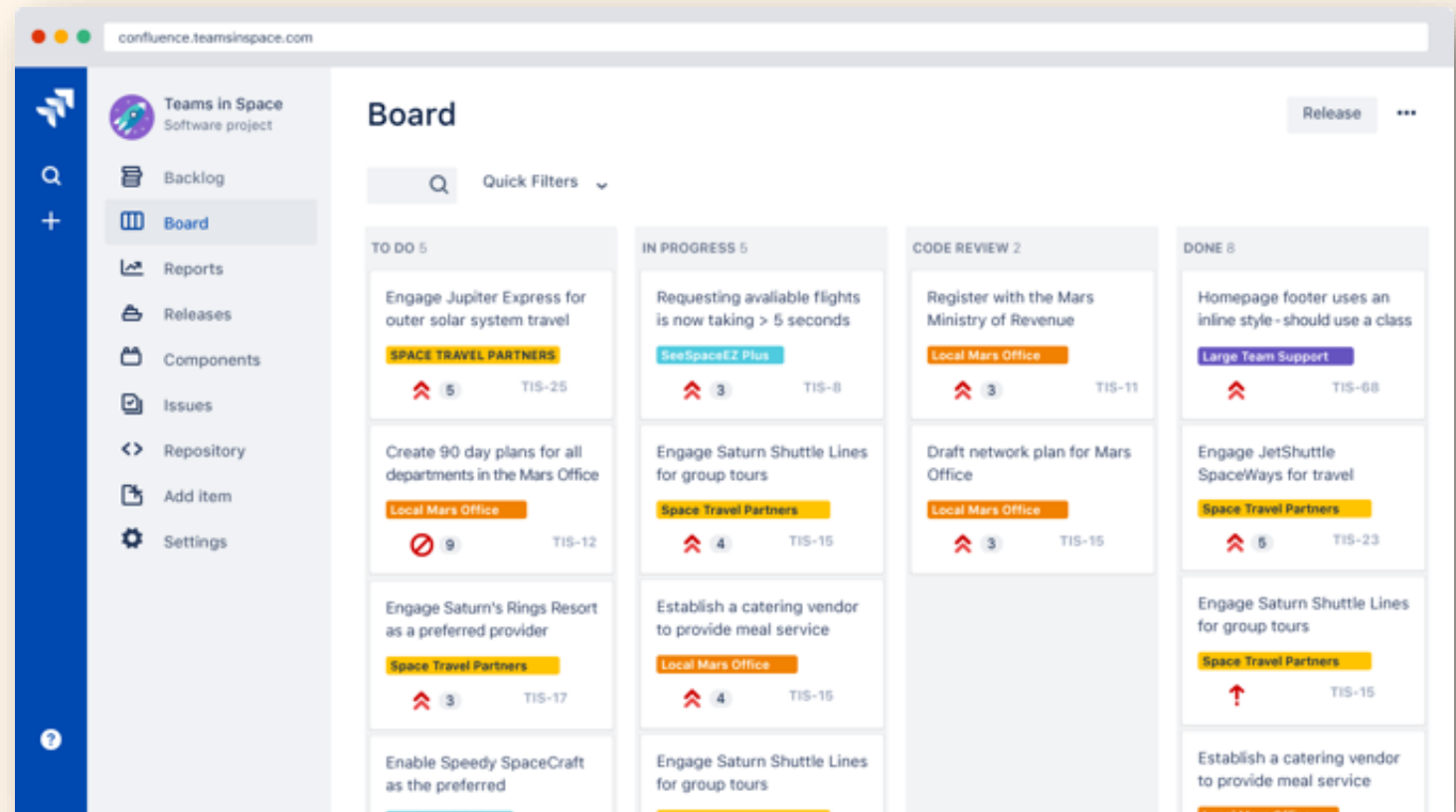
Project Management Tools



Purpose Built
Visual Workflow
Collaboration
Audit Trail
Customisation
Integration



Initial Setup
Overhead
Learning Curve
Cost



Dashboards



Real-Time Updates
Enhanced Metrics
Automation
Audit Trail
Custom Visualisations
Centralised View



Initial Setup
Training
Dependency on Systems
Maintenance Overhead

Deliverable Tracker

CDMG_0030_CDR_01_RESULTS_BUNDLED

Setup

Deliverables

Database

Version v1.0.0.12

Deliverable Tracker

Changes Log

Show 50 entries

Search:

deliverable_id	description	qc_level	mainline_programmer	mainline_status	qc_programmer	qc_status	deliverable_status	deliverable_active
ITL0001	Adverse events by preferred term	Test Critical	Megan Harries	Complete	Michael Byrne	Not Applicable	Ready for QC	Active
ITL0002	Adverse events by preferred term and Age Group	Test Most-Critical	Stuart Malcolm	Complete	Michael Byrne	Complete	High Level Review Passed	Active
ITL0003	Adverse events by primary system organ class and preferred term	Test Non-Critical	Christopher Brown	In Progress	Not Applicable	Not Applicable	In Progress	Active
ITL0004	Adverse events by preferred term and Country	Test Most-Critical	Megan Harries	In Progress	Michael Byrne	Complete	Issues	Active
ITL0005	Serious Adverse events by	Unassigned	Unassigned	To Do	Unassigned	To Do	To Do	Active

The background features a dark teal base with several overlapping organic shapes. A large, light blue shape with rounded corners is prominent in the center. To its left, a pinkish-purple shape with a diagonal gradient is partially visible. Several dark teal, elongated, rounded shapes are scattered around the central light blue shape, creating a layered, abstract composition.

Dashboard Example

Import of deliverable lists



 **Deliverable Tracker**
CDING_0000_CSR_01_RESULTS_BUNDED

SetupDeliverablesDatabase

Version v1.0.0.12

Specifications

Deliverables

Choose Specification

Browse...

TFL_List.xlsx

Upload complete

Select ID Column

Unique Identifier

Select Description Column

Title

Confirm and Upload

Show 10 entries

Search:

	Unique Identifier	Output Type	Output Reference	Title	Population	Footnotes
1	ITL0001	Table	10.1.1	Adverse events by preferred term	Safety Analysis Set	Numbers (n) represent counts of subjects. AEs occurring during treatment
2	ITL0002	Table	10.1.2	Adverse events by preferred term and Age Group	Safety Analysis Set	Numbers (n) represent counts of subjects. AEs occurring during treatment
3	PTL0003	Table	10.1.3	Adverse events by preferred term and Sex	Safety Analysis Set	Numbers (n) represent counts of subjects. AEs occurring during treatment
4	ITL0003	Table	10.1.4	Adverse events by primary system organ class and preferred term	Safety Analysis Set	Numbers (n) represent counts of subjects. AEs occurring during treatment
5	ITL0004	Table	10.1.5	Adverse events by preferred term and Country	Safety Analysis Set	Numbers (n) represent counts of subjects. AEs occurring during treatment

Add Deliverable

ID (needs to be unique within this project)

Description

Footnote 1

+ Add footnote

Population

Output Reference

Output Type

Orientation

Output filename

+ Confirm

Cancel

Custom actions



 **Deliverable Tracker**
CDNG_0000_CSR_01_RESULTS_BUNDED

 Setup

Deliverables

 Database

Version v1.0.0.12

Deliverable Tracker

Changes Log

Actions

+ Add Deliverable

≡ Assign QC Level

👤 Assign Mainline Programmer

👤 Assign QC Programmer

📄 Update Deliverable Status

📄 Update Mainline Status

📄 Update QC Status

🔄 Promote Program

🚫 Deactivate

🔄 Refresh Table

Show 50 entries

Search:

deliverable_id	description	qc_level	mainline_programmer	mainline_status	qc_programmer	qc_status	deliverable_status	deliverable_active
All	All	All	All	All	All	All	All	All
ITL0001	Adverse events by preferred term	Test Critical	Megan Harries	Complete	Michael Byrne	Not Applicable	Ready for QC	Active
ITL0002	Adverse events by preferred term and Age Group	Test Most-Critical	Stuart Malcolm	Complete	Michael Byrne	Complete	High Level Review Passed	Active
ITL0003	Adverse events by primary system organ class and preferred term	Test Non-Critical	Christopher Brown	In Progress	Not Applicable	Not Applicable	In Progress	Active
ITL0004	Adverse events by preferred term and Country	Test Most-Critical	Megan Harries	In Progress	Michael Byrne	Complete	Issues	Active
ITL0005	Serious Adverse events by	Unassigned	Unassigned	To Do	Unassigned	To Do	To Do	Active

Ease of navigation



**Deliverable Tracker**
CDNG_0000_CSR_01_RESULTS_BLI_NDED

[Setup](#)[Deliverables](#)[Database](#)

Version V1.0.0.12

Deliverable Tracker

Changes Log

Actions

+ Add Deliverable

≡ Assign QC Level

Assign Mainline Programmer

Assign QC Programmer

Update Deliverable Status

Update Mainline Status

Update QC Status

Promote Program

Deactivate

Refresh Table

Show 50 entries

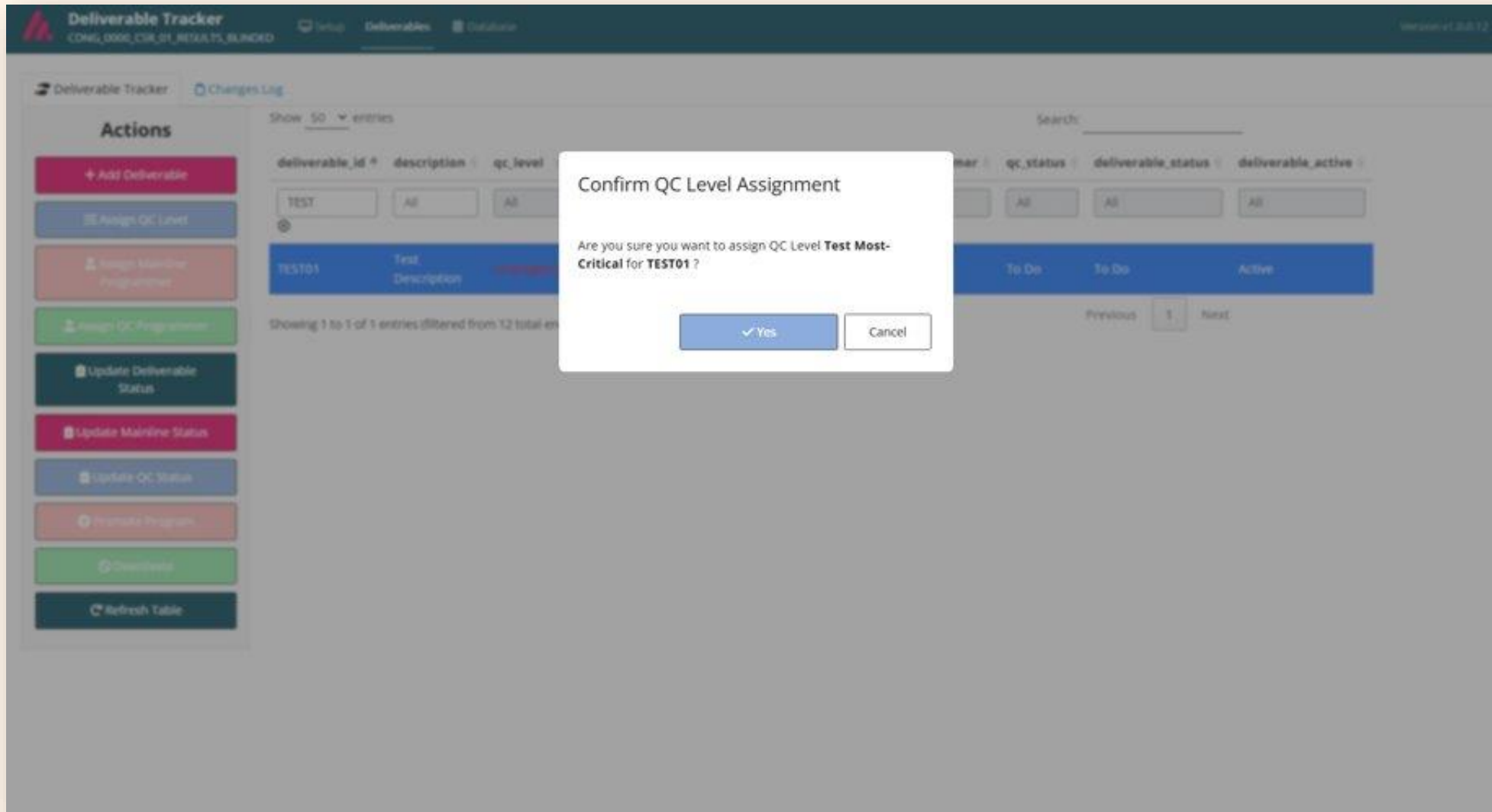
Search:

deliverable_id	description	qc_level	mainline_programmer	mainline_status	qc_programmer	qc_status	deliverable_status	deliverable_active
test		All	All	All	All	All	All	All
TEST01	Test Description	Test Most-Critical	Megan Harries	Complete	Michael Byrne	In Progress	Ready for QC	Active

Showing 1 to 1 of 1 entries (filtered from 12 total entries)

Previous1Next

Additional checks to avoid manual error



Git and SCE abstraction



The dev-main/TEST01 branch has been created.

The dev-qc/TEST01 branch has been created.

The stage/TEST01 branch has been created.

Your branches

Branch	Updated
dev-main/TEST01	now
dev-qc/TEST01	now
stage/TEST01	now

The Test Most-Critical bundle
TEST01_68f7a22a69fd16175e82ff51 has
been created.

Assigning users



 **Deliverable Tracker**
CDNG_0000_CSR_01_RESULTS_BLIENDED

SetupDeliverablesDatabase

Version v1.0.0.12

Deliverable TrackerChanges Log

Actions

+ Add Deliverable

≡ Assign QC Level

Assign Mainline Programmer

Assign QC Programmer

Update Deliverable Status

Update Mainline Status

Update QC Status

Promote Program

Deactivate

Refresh Table

Show 50 entries

Search:

deliverable_id	description	qc_level	mainline_programmer	mainline_status	qc_programmer	qc_status	deliverable_status	deliverable_active
test	All	All	All	All	All	All	All	All
TEST01	Test Description	Test Most-Critical	Unassigned	To Do	Unassigned	To Do	To Do	Active

Showing 1 to 1 of 1 entries (filtered from 12 total entries)

Previous1Next

Assign Mainline Programmer for TEST01

Assignee:

Megan Harries

Megan Harries

Michael Byrne

Stuart Malcolm

Christopher Brown

Close

Restricting users



Assign QC Programmer for TEST01

Assignee:

Michael Byrne

Megan Harries

Michael Byrne

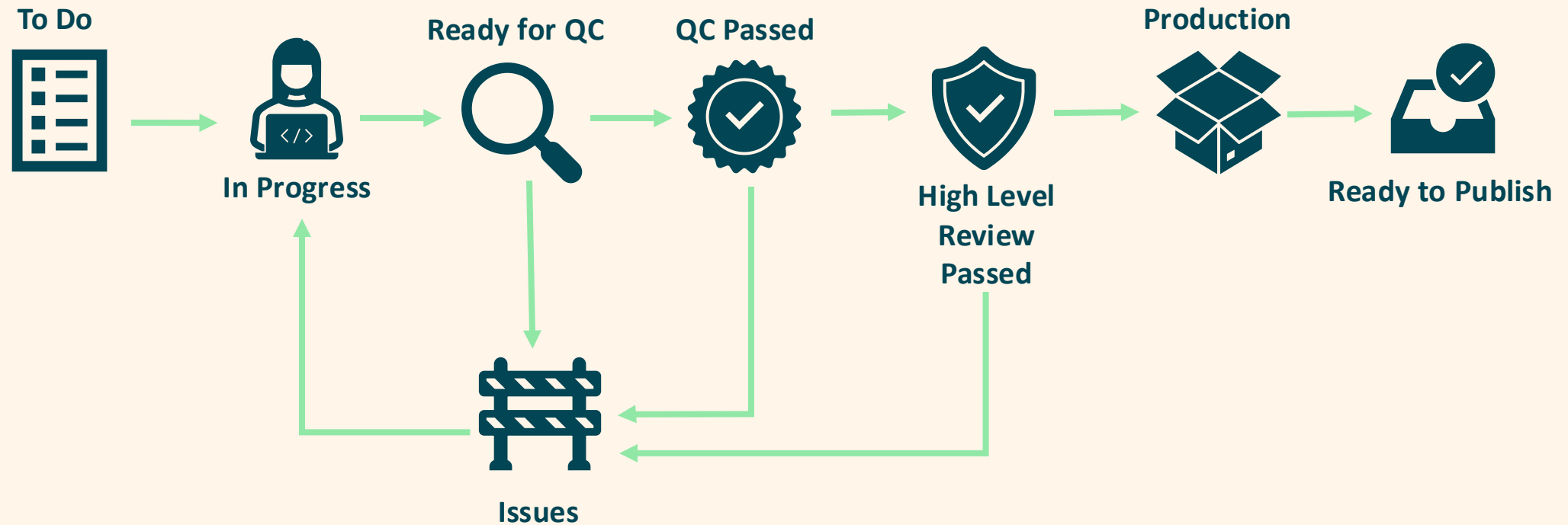
Stuart Malcolm

Christopher Brown

Already assigned as mainline programmer for this deliverable

Close

Assigning statuses



Assigning statuses



Update Mainline Status for TEST01

Status:

To Do

To Do

In Progress

Confirm

Cancel

Update QC Status for TEST01

Status:

In Progress

In Progress

Complete

Confirm

Cancel

Update Deliverable Status for TEST01

Status:

Ready for QC

Ready for QC

QC Passed

Issues

Cancel

Promotion of programs



Promote code for TEST01

Promote code to:

Stage

Which code is to be promoted?

Mainline

(Merge dev-main/TEST01 into stage/TEST01)

Promote Close

Promote dev-main/TEST01 to stage/TEST01 #1

Open HARRIMEA wants to merge 1 commit into stage/TEST01 from dev-main/TEST01

Conversation 0 Commits 1 Checks 0 Files changed 1 +1 -0

HARRIMEA commented now

Promotion of mainline development code to stage for TEST01

Create test.R Verified 9ace9e6

HARRIMEA self-assigned this now

No conflicts with base branch

Merging can be performed automatically.

Merge pull request You can also merge this with the command line. [View command line instructions.](#)

Reviewers

No reviews

Still in progress? [Convert to draft](#)

Assignees

HARRIMEA

Labels

None yet

Projects

None yet

Milestone

No milestone

Custom user messages



Deliverables with a QC level of Non-Critical do not require the assignment of a QC programmer.

A QC Level is already assigned for this deliverable

Record TEST0001 updated from ' To Do ' to ' In Progress '

Tables refreshed from the database successfully

The stage/TEST0002 branch has been created.

The dev-main/TEST0002 branch already exists.

The dev-qc/TEST0002 branch has been created.

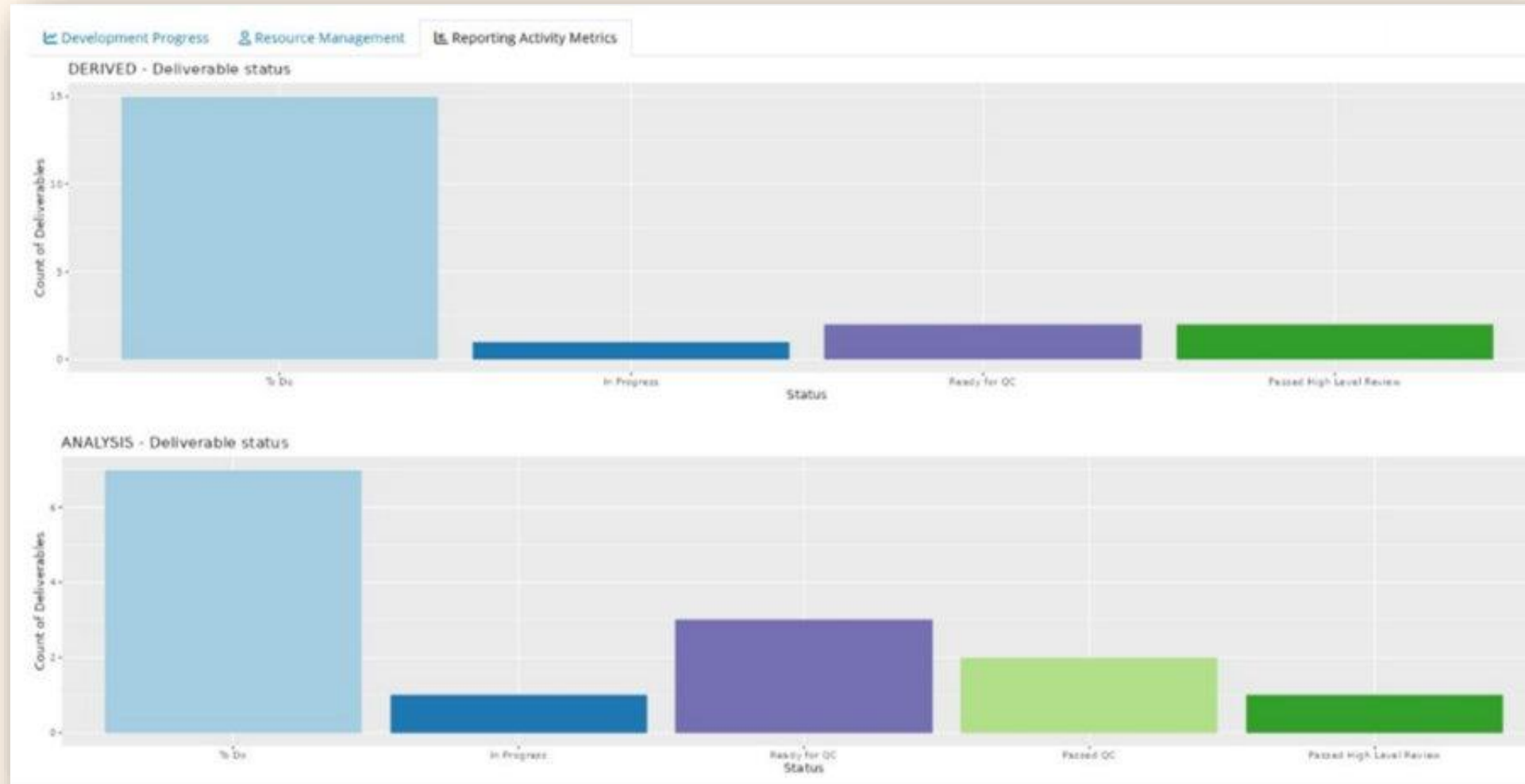
The Test Most-Critical bundle TEST0002_68a5d91f98d9397b07058b89 has been created.

Error creating PR: No commits between stage/TEST0001 and dev-main/TEST0001

Pull request for dev-main/TEST01 to stage/TEST01 created at:
https://ghe.com/reporting-activity-sbx/CDNG_0000_CSR_01_RESULTS_BLIENDED/pull/

Michael Byrne (BYRNEMI2) has been assigned to this PR

Metrics



Logging actions



 Deliverable Tracker CDNG_0000_CSR_01_RESULTS_BUNDED SetupDeliverablesDatabase Version v1.0.0.12				
Deliverable Tracker Changes Log				
Show 50 entries Search:				
deliverable_id	column_edited	previous_value	new_value	timestamp
All	All	All	All	All
ITL0006	deliverable_status	In Progress	Ready for QC	2025-10-22T13:51:22Z
ITL0006	mainline_status	In Progress	Complete	2025-10-22T13:51:15Z
ITL0006	deliverable_status	To Do	In Progress	2025-10-22T13:50:54Z
ITL0006	qc_programmer	Megan Harries	Christopher Brown	2025-10-22T13:50:46Z
ITL0006	mainline_status	To Do	In Progress	2025-10-22T13:50:36Z
ITL0006	qc_programmer	Unassigned	Megan Harries	2025-10-22T13:50:25Z
ITL0006	mainline_programmer	Unassigned	Michael Byrne	2025-10-22T13:49:00Z
ITL0006	qc_level	Unassigned	Test Most-Critical	2025-10-22T13:48:06Z
ITL0006	BUNDLE CREATION		ITL0006_68f7a22a69fd16175e82ff51 bundle created with policy Test Most-Critical	2025-10-22T13:48:06Z
ITL0006	BRANCH CREATION		dev-qc/ITL0006 branch created from release	2025-10-22T13:48:06Z
ITL0006	BRANCH CREATION		dev-main/ITL0006 branch created from release	2025-10-22T13:48:05Z
ITL0006	BRANCH CREATION		stage/ITL0006 branch created from release	2025-10-22T13:48:05Z
ITL0005	qc_level	Unassigned	Test Most-Critical	2025-10-22T13:48:04Z
ITL0005	BUNDLE CREATION		ITL0005_68f7a22a69fd16175e82ff51 bundle created with policy Test Most-Critical	2025-10-22T13:48:03Z
ITL0005	BRANCH CREATION		dev-qc/ITL0005 branch created from release	2025-10-22T13:48:03Z
ITL0005	BRANCH CREATION		dev-main/ITL0005 branch created from release	2025-10-22T13:48:03Z

Metadata management



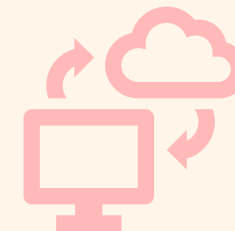
Postgres database

- Database contains all the deliverable tracking metadata for the projects across the SCE
- Easily link between projects
- Database is accessed through the service account running the app
 - No individual user credentials are required
 - Database can only be edited through the app



Dashboard setup

- R Shiny app deployed on the SCE





Key Takeaways

What is the problem we are trying to solve?



HAVES

Standalone

Manual

Static

Integrate

Automate

Accelerate

WANTS

Connected

Automated

Scalable

What is the next problem to solve?



HAVES

Connected

Automated

Scalable

WANTS





Questions?

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