

Overview

The client is a leading multinational developer, manufacturer and marketer of innovative medical technologies in the fields of vascular, urology, oncology and surgical specialty.

Background and Objectives

The client was faced with a major project – it was required to migrate SOP and Quality documents from various repositories and file stores into a modern, centralized controlled document application. In reality, there were source systems at 15 manufacturing plants worldwide. The initiative was undertaken to reduce the IT footprint and associated costs. While reviewing competitive alternate document management technologies, the client required solutions that could put in place a defined migration strategy for legacy systems as diverse as QUMAS DocCompliance, Xerox Docushare and fileshares, and ensure that they could be migrated successfully.

The client faced a sizable migration effort, as more than 200,000 records with a content size of about 100GB were to be consolidated into the new, single system. Additionally, the company needed to detect documents that were shared between some of the 15 different locations and were represented in more than one QUMAS (source) instance.

Migration Challenges

This migration effort was not without its unique set of challenges. First, the client's content had to be migrated from multiple sites to a centralized one. Also, the network bandwidth was limited, and was unable to support the data transfer in a reasonable amount of time. Additionally, the company faced problems identifying which documents appeared in multiple sites. Compliance issues were also critical to the success of the migration effort, and had to be taken into account when a change was made to the same document in two different sites. For the company, the question was clear: which one would be the actual effective version moving forward?

The team also faced a secondary hurdle, as large documents were compressed in the legacy QUMAS systems and folder structures and document naming conventions were inconsistent. QUMAS had very little metadata maintained in the database, with much of the document information included in the folder structure. In addition, the QUMAS viewing module concatenated multiple files, causing it to appear viewable as one single document. As a result, the data transformation requirements greatly varied by site.

Valiance Solution

With a migration effort this complex, the company knew that it would need the proper expertise to orchestrate the migration and establish MasterControl as the centralized document management vendor. Based on its success with other highly regulated, highly intricate migration efforts, the client turned to Valiance as its strategic team partner.

Prior to the start of the implementation, Valiance and MasterControl initiated a discovery phase to find potential migration and configuration issues. During this phase, several requirements were identified that shaped the migration approach.

The discovery phase verified that TRUmigrate could manage all of the migration requirements, including interfaces to all relevant technologies. TRUmigrate was able to manage the QUMAS file compression transparently as part of the overall migration. TRUmigrate also concatenated the PDF files associated with a QUMAS document instance, so that the MasterControl users could view all of the content in a single document – just as they saw it in QUMAS.

Content mappings were defined in TRUmigrate to map one of the QUMAS files or PDF renditions to the MasterControl main file, and the remaining files as attachments.

To address the network performance issues, the exported content was then copied to an external hard drive and shipped to the centralized location for import. For testing purposes, TRUcompare distributed content comparison (DCC) was implemented to reduce the network load for comparison.

TRUcompare also identified the documents that existed in more than one site, enabling the business to decide which version would be migrated. Parallel to the migration, the client used the TRUcompare results to address and resolve their related compliance issues.

An archive instance of MasterControl was created to store the historical, audit trail and change control data. To work around the data structure differences, audit trail and change control data were rendered to a PDF file and associated to the documents as an attachment.

Results

The results of the migration were a resounding success. TRUmigrate was able to transfer the documents from all legacy systems successfully. In addition, TRUcompare was used to verify the data migration at the field level for 100% of the data and content. Since TRUcompare had been used for previous migrations by this client, the validation process had been standardized and was very straightforward.

The flexibility of the TRUmigrate mapping interface was another successful outcome. It enabled the client to ensure that the required information derived from the folder path was migrated to the correct MasterControl attributes without the need for coding. Additionally, the client was able to

15 Source Systems into One MasterControl Platform



mimic QUMAS' viewing functionality as part of the migration process, a critical system feature that increased system adaption.

Most importantly, configurable automated tools for migration and migration testing enabled the migration and migration validation to be completed within the required timeframes and budget for the initial site, allowing for very efficient validated migrations at subsequent sites.



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About Valiance Partners

Valiance Partners is a leading vendor for high-risk data and content migrations when compliance and business risk demand "getting it right."

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