Overview

The client is a world leader in the global household, health and personal care sectors whose brands are sold in more than 200 countries worldwide.

Background

As a world leader in household, health and personal care products, the company faced a significant demand —it needed to apply more rigid controls to its regulatory documents. One of the factors involved in attaining improved controls was a required upgrade of its EMC Documentum system. Currently using version 5.3, the updated system would be upgraded to Documentum Compliance Manager (DCM) version 6.5. In addition, the upgrade was to be performed in place, and no migration was anticipated.

Migration Challenges

The company faced several challenges as part of the upgrade. First, the client's legacy content needed to be converted to controlled documents in DCM 6.5. With more than 20,000 documents to convert, the company knew it was not feasible to manage the process manually – the only method known to the company at the time. As a second challenge, the company's business users would be the ones managing the document conversion across departments. As such, the company knew that it needed a solution to assist with the upgrade. Core requirements for the chosen technology included user-friendly functionality and the ability to apply filters to define the scope of the data in conversion. Unfortunately for the company, there was no software solution available from EMC/Documentum to aid in the transformation.

Valiance Solution

From the start, EMC recommended Valiance Partners. EMC's endorsement was based on successful past engagements between its team of highly skilled migration specialists and its data migration software, TRUmigrate. In addition, Valiance's experience with controlled document management allowed the company to understand and ensure that all business and compliance requirements were considered.

Working with the client, Valiance guided the company's team through their options using audit trails and its specialized validation process. As a result, Valiance and the client decided to create an audit record capturing the conversion to controlled documents, as well as all of the essential document attributes including class, status, lifecycle, policy, and so on.

Valiance's TRUmigrate technology was the first off-the-shelf solution that migrated DCM controlled documents. This feature was the perfect foundation on which to build a supported

application for the client, as the user community could convert documents in place automatically. Using TRUmigrate, the upgrade was completed with ongoing support and maintenance for the client's continuing conversion requirements.

Results

Relying on Valiance's team of experts as well as its advanced TRUmigrate technology, the client was able to complete the upgrade successfully and as designed. Even the client's non-technical staff found TRUmigrate easy to use, because of its superior software interface. In addition, the project had a budget and schedule for user training, but the client was ultimately able to implement the upgrade with minimal assistance, and the users completed the required conversions with little training or post-migration support from Valiance. There have been no reported software issues since the software was originally delivered, and the conversion was completed successfully.

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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."

For more information: www.valiancepartners.com, or call 800.880.4540

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