

Migrating Content in to Connect

Moving to a new cloud-based system with refined business processes and robust indexing features often requires careful planning to migrate content to your new system effectively. To minimize this burden on our customers, our rigorous and comprehensive Migration Services team ensure the smooth migration and movement of documents and data into Montrium Connect applications.

Montrium's skilled migration team has managed hundreds of document and data migrations for our customers on a broad range of life science projects. With a series of modern tools built directly within the Connect platform, our customers can streamline the assignment of metadata and map content to speed up and simplify migrations of large content stores for scalability and performance.

Reducing Migration Risk with a Comprehensive Data Migration Approach

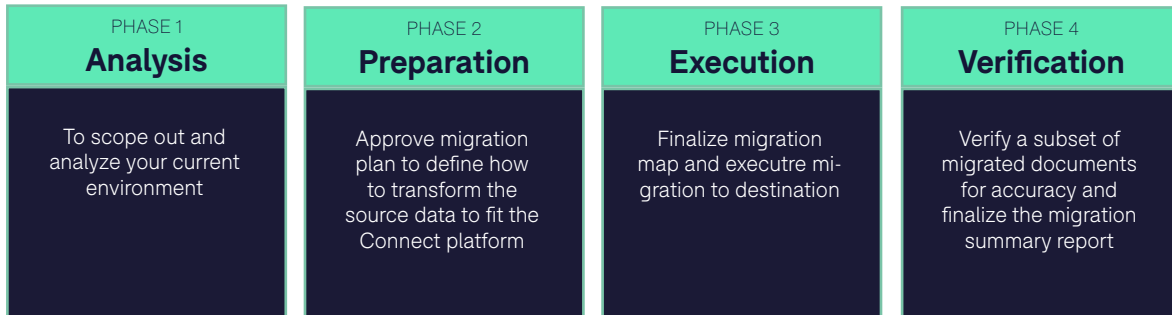
Working with our business and implementation teams to plan the migration, large volumes of content data can migrate to the cloud from a data repository, fileshare or content management platforms such as Veeva, SharePoint, Office 365 and others. Steps taken can be customized depending on your organization's unique business needs, internal processes, and resource capacity.

Migration of documents and data is an optional service that Montrium can provide at an additional cost. We handle the data cleaning, mapping, extraction, conversion, and verification of data. Throughout the project, you will receive comprehensive Migration Support to provide insights and recommendations for successfully migrating to Montrium Connect as well as documented deliverables.

As part of our Turnkey Migration approach, a one-time migration can migrate thousands of documents and minimize or eliminate any downtime. This approach has proven to be successful for many types of projects, and our designated team will help you throughout each phase of the migration, as we will explain later. After the initial migration with Montrium, clients can easily migrate smaller data batches (e.g. numerous studies) on their own, with intuitive batch indexing functionality.

Migration Done Right: The 4 Phases

As part of our comprehensive Migration Approach, our implementation team will take you through four migration phases and produce documented deliverables for your project:



1. Migration Analysis to scope out and analyze your current environment.
2. Migration Preparation to identify any issues and define how to transform the source data to fit the Connect system.
3. Migration Execution to execute tests and ensure the migration is successful.
4. Migration Verification to ensure the results are adequate.

The Migration Analysis phase includes:

Initial information-sharing on your legacy system and source documents, supported by communications between Montrium and Customer (meetings, discussions, information gathering, obtaining access to the client's legacy system).

Migration Analysis

- Identifying where the information is (often in various systems, e.g. file share, legacy systems)
- Identifying the document types to migrate used by the client team
- Identifying what will be needed to extract and transfer the documents in the system
- Identifying if metadata can be extracted or other measures to take
- Identifying a structure used for managing all the documents
- Create extraction scripts to identify the relevant information (e.g. determining the number of locked source files, effective documents, etc.)

This analysis will serve the creation of a draft Migration Plan which details the process and logic used for the migration and the methods used for verifying the migration for the importation of documents from one system to another.

The Migration Preparation phase includes:

- Finalizing the Migration Plan.
- Extracting documents and metadata from the source location (often a legacy system) utilizing automated tools for both the migration and the verification).
- Uploading documents and metadata in the Migration Mapping Library of the application(s) of interest. The Mapping Library is a temporary staging area that allows you to index and clean documents before migration to the final destination. The Library consists of an extract of your document filenames and metadata values used for verification.
- Updating the metadata and performing data cleansing if required.
- Verifying documents and metadata are indexed in the Migration Mapping library and are ready for migration.
- Extracting a final version of the mapping library, which is called the Migration Map. Following approval of the Migration Map, the mapping library is made read-only to prevent it from being modified.

The Migration Execution phase includes two parts:

- Montrium uses automated tools to move documents and metadata to the appropriate list and libraries in the system.
- The Migration Execution phase will be summarized in the Migration Summary report, which captures the number of documents migrated and provides details about the automatic and manual verifications performed.

The Migration Verification phase includes:

- Running automated checker scripts to ensure the migration of all data elements and preserve critical data attributes to produce the expected results.
- Clients may perform their verifications should they choose.
- Development of a Migration Summary Report, which includes the documented verifications and summary of the migration execution.
- Approving the Migration Summary Report

What to expect when undergoing migration?

Extra attention should be paid when migrating electronic records. You will find it beneficial to create a Migration Plan to allocate resources, tasks, owners, and milestones that will set you up to maintain “business as usual” with minimal downtime. Start by asking questions to uncover how your current process shines, identify barriers to success early, and what you may need to anticipate with a new system, including:

- What is the overall objective of your Connect migration?
- Can you conduct a proper assessment of your current landscape to achieve a balance between risk reduction, effort, and cost?
- Who will take charge of migrating the documents, and how? Who will oversee managing and monitoring your Migration Plan?
- What is the plan for the documents that will remain in the legacy system? Will they be archived?
- Does all data need to be migrated or only current operational data?
- How will audit trails related to electronic records be migrated?
- Do any data quality issues exist? Are you prepared to make corrections to source data?

With a strong team, a reliable partner, and a well-thought-out plan, migration will achieve that goal of efficiency and productivity, without the primary headaches.

About Connect

Montrium Connect is a cloud-based regulated content management system that is designed to optimize and empower clinical, regulatory and quality teams. Connecting teams globally, Montrium Connect brings together business-critical applications for document & quality management. With powerful and intuitive navigation, enhanced user experience, dynamic content management and search features, users can collaborate on and access the information they need, easier and faster.

About Montrium

Founded in 2005, Montrium is one of the leading providers of cloud-based content and collaboration software to the life sciences industry. Serving over 200 clients in over 20 countries, we are committed to delivering unparalleled subscriber experience, innovation and product quality to emerging organizations as a true technology partner. Montrium is headquartered in Montreal, Canada, with offices in Luxembourg and Brussels, Belgium. For more information, please visit www.montrium.com.

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