



Case Studies

Veeva Vault Migrations

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Major Health Product Company Migrated Data to RIM After Divestiture

Source Platform: Liquent, Documentum, Fileshares | **Target Platform:** Veeva Vault RIM

Overview

This data migration project involved two major, internationally known, personal health and consumer products companies. For a time, the two giants formed a joint venture of their over-the-counter divisions. After they decided to dissolve that joint venture, data had to be transferred from the seller's system onto the buyer's system, within the TSA exit deadline.

Background

This migration involved moving data from sources that included Liquent Insight Manager 6.1, Documentum FirstDoc and fileshares to the target Veeva Vault RIM. The data volume was significant: 1,100 licenses, 6,100 registered packages, 4,300 regulatory objectives and 51,000 source documents amounting to 100 GB of content.

Objective

The goal was to create a unified platform to house regulatory tracking data, submissions and source documents. The effort had to take into account the new regulatory organization for the acquiring company, a new cloud-based Veeva RIM solution with migrated data and the need to train business users on a completely new system in six months. Time was of the essence; everything had to be up and running from day one prior to the departing company's TSA expiration.

Migration Challenges

- ✔ **MIGRATING DATA TO A UNIFIED GLOBAL TARGET SYSTEM** that caters to several regions and countries – each with its own local regulations and guidelines – **IS A CHALLENGING TASK NORMALLY**. Furthermore, the data between the three sources was not connected, making the migration rules and mapping unusually complex.
- ✔ **SOURCE SYSTEMS DID NOT “TALK” TO EACH OTHER**. Hence, there were several data mapping challenges to tie the tracking data that was in Insight Manager to the documents in FirstDoc.
- ✔ **THERE WERE QUITE A NUMBER OF ISSUES WITH THE DATA ITSELF**, as it was not maintained well in the source systems. Valiance conducted an extensive analysis and several quality checks to identify data anomalies that had to be cleaned up in the source system prior to migration.

- ✔ **THE VEEVA SYSTEM BEING IMPLEMENTED WAS NEW TO USERS.** While the system was being built out, business users reviewed the migration and migration testing. At the same time, user training was also taking place, creating a very stressful environment. Colleagues were performing their daily responsibilities as well as participating in numerous Veeva and Valiance workshops while also doing the migration reviews.
- ✔ As part of the separation of the joint venture, **THE BUYING COMPANY WAS ALSO HIRING NEW EMPLOYEES.** In the already hectic environment, this added to overall stress levels.

Valiance Solution

The Valiance team used its signature **TRUseries software**, **TRUmigrate™**, **TRUcompare™** and **TRUconsole™**, as well as its **Migration InSight methodology**. There were effective periodic communications with the project stakeholders, frequent discussions with SMEs on migration issues and regular data quality checks. The dry run reviews were conducted with SMEs familiar with the old business process as well as the new one in Vault RIM.

Results

Valiance's expertise in the Insight Manager application and its complex data model was well appreciated by the customer. The detailed migration rules were precisely tailored to meet regulations for various countries across the globe. The migration was completed on budget and on time – meeting the TSA deadline. What's more, the client realized they had a trusted data migration partner and went on to hire Valiance for their next migration for another acquisition.

I do not envy the work of mapping thousands of data fields and moving what might be 3X the data we inherited from a prior Joint Venture about this time last year. You demonstrated great credibility this week and, although moving regulatory data scares me sometimes, we left with zero doubt that this will be managed - as it was with the prior effort - with excellence.

Global IT Leader, Personal Health Care and Migration Project Manager

DocuShare to Veeva Vault for A Global Technology Company

Source Platform: DocuShare | **Target Platform:** Veeva Vault

Overview

The client was a multinational technology company that specialized in the development and marketing of systems that helped clients manage clinical data and optimize clinical trials from concept to conclusion, across the entire clinical development process. Those processes included study and protocol design, trial planning and management, electronic data capture, safety event capture and medical coding.

Valiance's partner on this project was Veeva Systems. Veeva's cloud-based content management solution for the life sciences industry, Veeva Vault, is a best-of-breed cloud platform built for regulated content management.

Background

After a careful review of cloud-based content management platform alternatives, the client concluded that Vault was the right technology platform on which to architect its future controlled document management system. In order to affect this platform change, the client needed to migrate 500,000 documents from their existing DocuShare platform.

Migration Challenges

The client initially opted to manage the migration in-house. Their focus was on the extraction of documents and metadata from the DocuShare platform. However, after several months a key DocuShare resource left the team and the process ground to a halt.

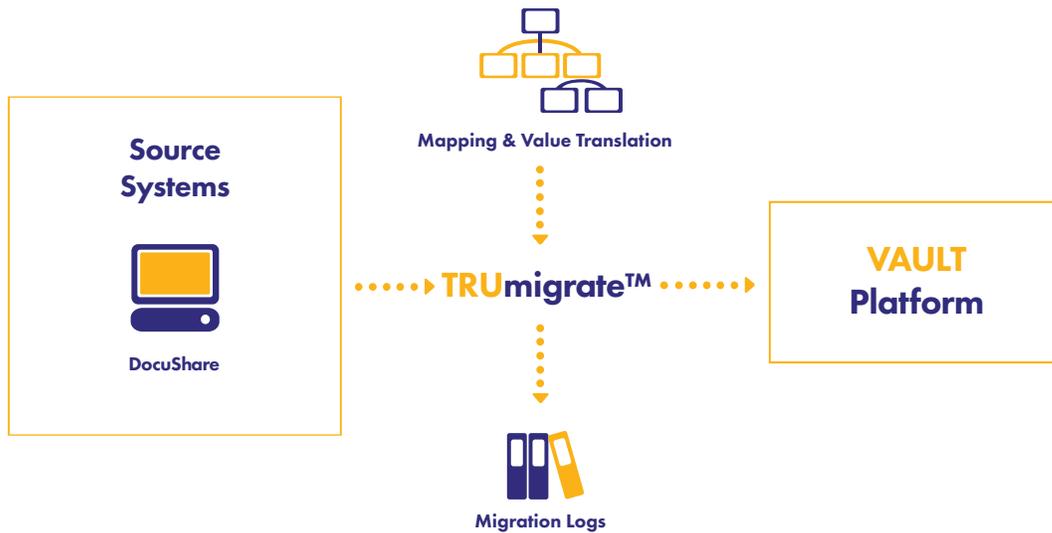
At this point, additional requirements for the successful completion of the migration had been identified:

- ✔ **THE BUDGET WAS MOSTLY EXPENDED** and remaining tasks needed to be completed within the original budget.
- ✔ **ISSUES RELATING TO THE QUALITY OF THE DATA EXTRACTED THUS FAR HAD BEEN IDENTIFIED**, and these issues would need to be addressed.
- ✔ With volume levels not seen before in a migration to Vault, **SUFFICIENT THROUGHPUT HAD TO BE ACHIEVED.**
- ✔ **THE TIME FRAME FOR COMPLETING THE MIGRATION COULD NOT BE POSTPONED.**

In addition to the above, metadata cleansing requirements had not yet been addressed, and would need to be undertaken prior to documents being loaded into Vault (including transferring the legacy folder structure to a Vault binder structure).

The clock was ticking and budget dwindling, as Valiance arrived on the scene.

Valiance Solution



The client opted to take advantage of Valiance’s out-of-the-box migration application for data import activities. **TRUmigrate™** supports the Veeva Vault API for the creation of documents and binders – and is able to link documents to the appropriate binders. Imports were run using several parallel threads to increase throughput and meet performance requirements.

The client then turned to Valiance for further assistance when their in-house approach fell short. Valiance was able to take advantage of TRUmigrate’s direct connection to DocuShare, to provide better export results and performance than the custom scripts that the client had been using. Altering course and having a single vendor responsible for the end-to-end process lead to an immediate benefit: a uniform and efficient approach for DocuShare export, customer-driven data cleansing supported by configurable source-to-target mapping rules and a high performance import into Veeva Vault.

Results

This engagement, which had a business-critical production date, was dealt a significant and unexpected turn of events mid-way. Given the dynamic environment, the results speak volumes about Valiance’s performance: 500,000 documents and associated metadata were migrated with better-than-expected throughput, and TRUmigrate was used in the nick of time to manage the export. Valiance delivered the project on time, within budget.

Both Veeva and the customer have been so thankful and impressed with the level of effort [Valiance] has extended to help us and the customer be successful.

Veeva Systems Project Manager

Large Scale eTMF Migration from Documentum to Veeva Vault

Source Platform: Documentum | **Target Platform:** Veeva Vault

Overview

The client was a research and development organization within a top tier global pharmaceutical corporation. Its research focused on the fields of cardiovascular, metabolism, immunology, infectious diseases, vaccines, neuroscience and oncology.

The client chose Veeva Vault – Veeva’s best-of-breed, cloud-based content management solution for the life sciences industry – as its repository of choice for eTMF documents. Legacy documents needed to be migrated from a customized Documentum application containing three million documents. The data had to be migrated using a phased approach, which is often the case with eTMF content, where waves are defined according to groups of studies. For this project, Valiance partnered with Veeva Systems.

Migration Challenges

Given the large volume of documents to be migrated – possibly the largest in Veeva Vault history at the time – an aggressive timeline loomed: the client wanted to complete an initial wave of 1.5 million documents in six to eight weeks. The document classifications in the source eTMF Documentum system needed to be translated to corresponding classifications in the Vault application, and there were complex mapping rules, which varied by document classification. Performance issues would arise when the project stressed the Veeva API, and Valiance collaborated with Veeva’s product development team to optimize the migration process.

Valiance Solution

Valiance’s **TRUmigrate™** software offers native support for both Documentum and Veeva Vault. After the software connects to Documentum and Vault eTMF, it reads in the respective schemas and enables a faster configuration process. Even with the complexity of the mappings and the treatment of the document classification mappings as a supplemental source, with TRUmigrate everything is configurable out-of-the-box without custom code, scripts or plug-ins.

Document classification mapping is a user-driven process. Because this migration project had over 500 mappings, there was plenty of opportunity for error. Valiance worked with the client to create and manage a straightforward spreadsheet template. Valiance and the client could easily review and edit the classification spreadsheet to assure it met all requirements. Additionally, this classification spreadsheet was integrated with TRUmigrate and was part of the typical eTMF migration configuration.

As is often the case with larger scale migrations, there was a need to implement a multi-batch, multi-threaded process to meet performance objectives. This becomes straightforward with Valiance’s **TRUconsole™** to define, manage and automate the execution of parallel and successive serial batch runs.

Results

Valiance worked closely with the client and Veeva to monitor the migration during the dry runs, where the migration process may be informally tested. When the imports slowed down as repository volume increased, Veeva identified opportunities to tune the API for better performance. Additionally, the client recognized that many of the studies that were initially deemed “closed and locked” were just closed and users were still editing content.

Valiance collaborated with Veeva to address the performance challenges. The changes to the scope of locked content were efficiently managed between Valiance and the client. The results: the initial migration was successfully completed with 1.5 million documents, and the client went into production on time with the scope of the migration focused on locked content.



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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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