



* Feeling Good About Your Migration:
A Field-proven Framework For Performing Validated Documentum Migrations *

Presented by:

David Szweda , Sr. IT Analyst
Solvay Pharmaceuticals

Jes Wills, Software Architect
Blue Fish Development Group

Feeling good about your migration

Agenda



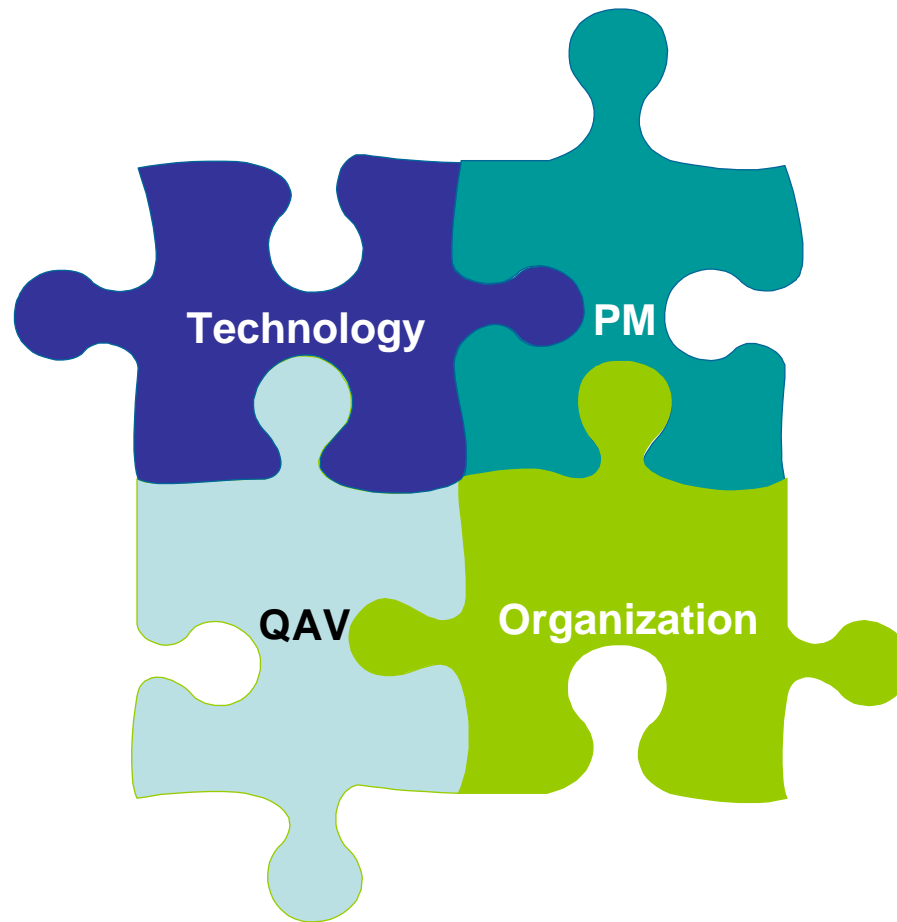
- Introductions: Solvay and Blue Fish
- Things To Take Home With You
- The Mission: SOLID Phase 4
- Executive Concerns
- Challenges and Solutions
- Results

- **Solvay Pharmaceuticals**
 - International pharmaceutical group, part of Solvay S.A.
 - Represented in 50 countries with almost 30,000 employees
- **Blue Fish Development Group**
 - Exclusively focused on ECM since 1999.
 - Content Migration, WCM and Custom ECM Practices.
 - Recognized Documentum Expertise.



Feeling good about your migration
Things to take home with you

EMC²
where information lives[®]



It is a puzzle...

Feeling good about your migration

Things to take home with you



Organization

- 100% confidence level is key!
- Build a global team



Project management

- Fixed budget and timelines are possible
- Clearly define the scope



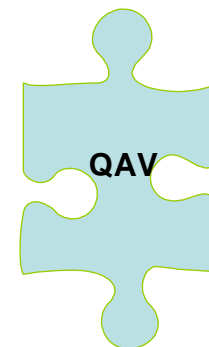
Technology

- Consider Enrichment/Inspection phase with common tools
- Estimate the scope of exported objects



Quality Assurance Validation

- Understand 100% validation process



Feeling good about your migration
The Mission: SOLID - Phase 4



SOLID: Centralized EDM repository for Manufacturing and R&D

Phase 4: Roll out and migration

- 11 Legacy Systems in 5 Countries
- 4 Languages - German, French, English and Spanish
- 3 Repository Platforms
 - Documentum DCM
 - Documentum EDMS98
 - File systems and Archives
- ~475,000 documents with ~55,000 relationships



Feeling good about your migration Executive Concerns



- Previous phases exceeded timelines and budgets
- Management of costs
- History of unsuccessful migrations
- Migration must be complete when the system goes live
- Negative general opinion around migration
 - Tough, expensive, and not very sexy

Organizational Challenges

- No migration experience
- Initial outsourcing quotes were unacceptable
- Dealing with multiple languages
- Data was coming from systems with inconsistent operating practices



Organization Challenges Addressed by:

- Performing trial migrations to choose partner
- Forming a global migration delivery center (MDC)
- Assigning team leads on local level
 - Give each decision authority
 - All team leads had a good command of English
- Executing each migration at least three times
- Business users auditing the results of each migration
- Adopting an approach based on the Blue Fish Migration Methodology and product suite



Project Management Challenges

- Scoping the project
- Prioritizing requirements
- Coordinating migration timelines with go-live planning



Project Management Challenges Addressed by:

- Precisely defining the scope
- Creating a global roll-out plan
- Using disciplined behaviour throughout the project
- Combining fixed-price initial migration with subsequent T&M migrations
- Blue Fish to execute the first migration and assist on subsequent migrations
- A day-to-day, highly detailed plan describing all of the necessary activities and timelines



Technology Challenges

- We didn't want to "reinvent the wheel"
- Source repositories on different platforms, located at local sites
- Integration of non-technical Business User Knowledge
- Migration volumes resulted in some processes running for several days
- Mapping old object models to a new model



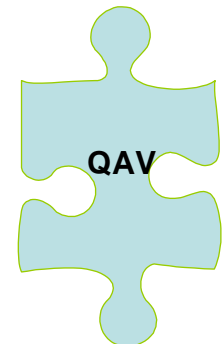
Technology Challenges Addressed by:

- Avoiding complex re-engineering by using the compliance layer of the target system
- Adopting a flexible process
- Detecting issues early, through inspection and validation
- Ensuring consistency by validating 100% of the migrated information against its specification
- Use common tools like MS Excel and MS Access



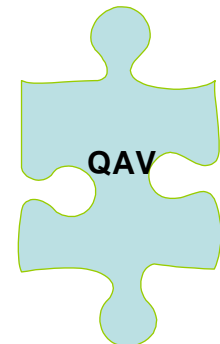
Quality Assurance Challenges

- Validating the overall process
- Validate 100% of the content and metadata migrated
- Validation of business users' rules



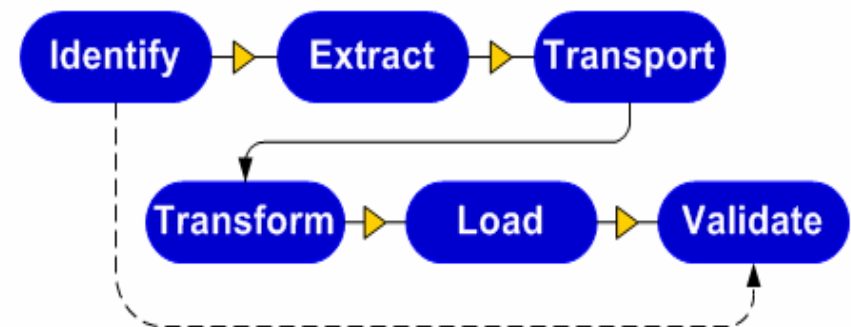
Quality Assurance Challenges Addressed by:

- Business users performing enrichment/inspection:
 - Using Blue Fish tools as workhorses
 - Using Mapping spreadsheets and Enrichment databases
- Recording audit trail for all data
 - Ability to remove failed migrations
- Testing early, testing often, testing with the entire dataset
- Validating the entire toolset
- Using standardized import/export tools
 - DIXI, spreadsheet-based specifications, common enrichment application




The Blue Fish Framework

- Identify the data to be migrated
- Extract the data from its current repository/file store
- Transport the data from its current location to the new location
- Transform the data into the new structure
- Load the data into the new repository
- Validate that the data was transformed and loaded correctly



The Blue Fish Approach

- Work with business users to define migration rules for each kind of document
- Automate the conversion of business rules into XML
- Leverage Blue Fish DIXI (Documentum Import/eXport Interface) 
- Allow non-technical business users to validate documents at each step of migration
- Introduce an enrichment step to allow users and/or administrators to perform meta data enrichment
- Automate the process to allow repeatable test migrations



Feeling good about your migration

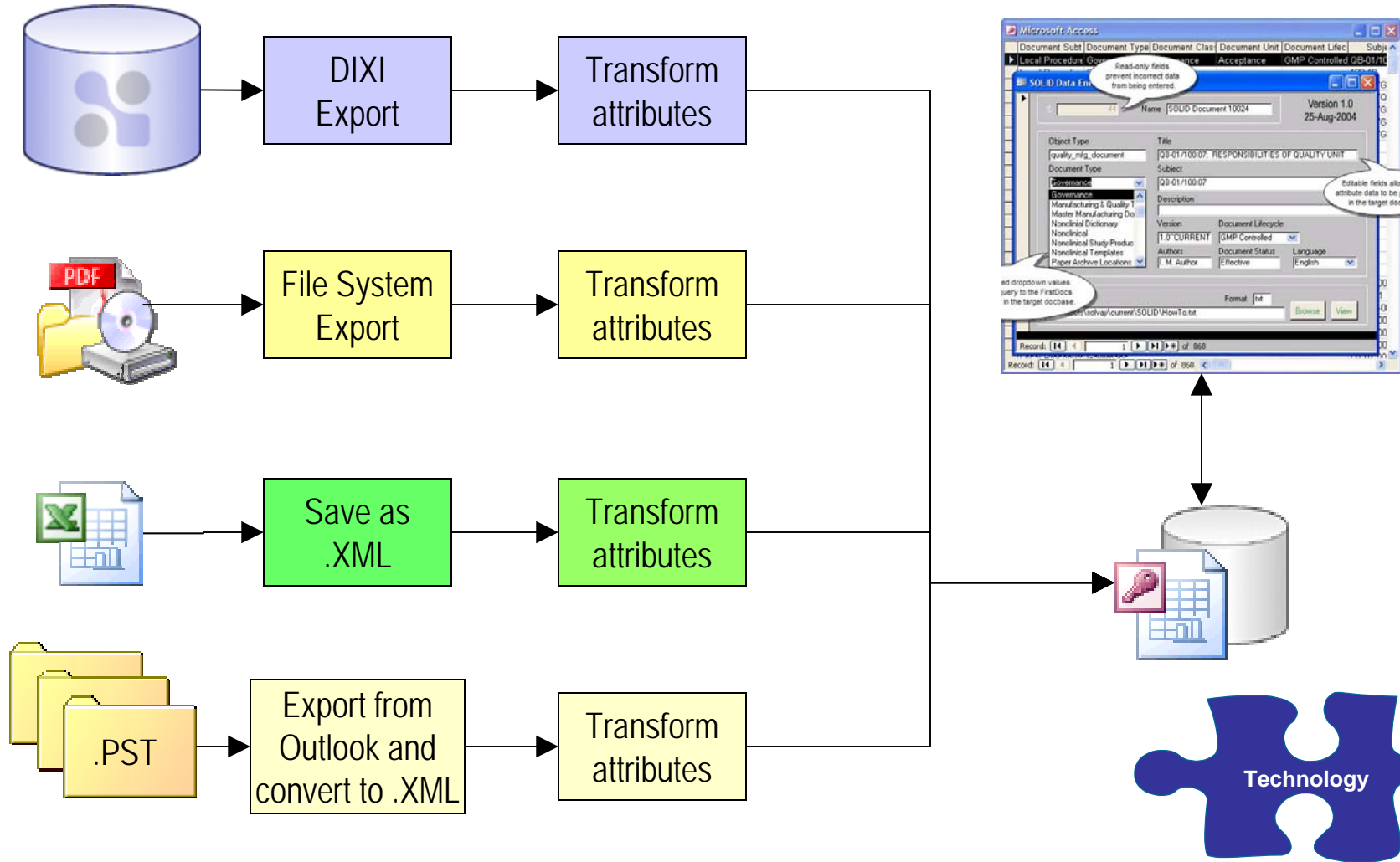
Business Users specify the rules



	B	C	D	E	F	G
1						
2	Mapping from SOURCE into SOLID					
3	/SLV 306/Clinical/Phase II Studies/<Studnumber> /<Studnumber>-Protocol Amendment 1					
4	/SLV 306/Clinical/Phase II Studies/<Studnumber> /<Studnumber>-Protocol Amendment 2					
5						
6	SOLID User Terminology	SOLID System Field	Action	Attribute	Value	Rule
7	Object Name	object_name	Ignore			
8	Document Class	document_class	Fixed		Report Clinical Protocol	
9	Document Type	document_type	Fixed		Lookup Table A	
10	Document Subtype	document_subtype	Fixed			
11	Document Unit	document_unit	Lookup			
12	Document Subunit	document_subunit	Ignore			
13	Title	title	Copy	title		
14	Abbreviated Title	abbreviated_title	ApplyRule			ab title rule
15	Subject	subject	Copy	object_name		
16	Document Lifecycle	lifecycle_name	Fixed		R&D NA	
17	Authors	authors	Default	authors		
18	Document Status	document_status	ApplyRule			doc status rule
19	Version	r_version_label	ApplyRule			doc version rule
20	Legacy Document Number	legacy_doc_number	Ignore			
21	Language	document_language	Copy	language		
22	Owning Department	department_code	Fixed		HNK COE CY	
23	Year of Creation	creation_year	Copy	r_creation_date		
24	Product code	product_code	Fixed		0047	
25	Study Number	Study_number	Variable		<Studnumber>	
26	Study Report type	study_report_type	Fixed		Clinical Study Quintiles	
27	Contract Organization	contract_organization	Fixed			
28	Issue Date	issue_date	Copy	approval_date		
29	Description	log_entry	Copy	log_entry		
30						
31						
32	Variable	Operator	Attribute			
33	<Studnumber>	contains	S306.2.008			
34	<Studnumber>	contains	S306.2.009			
35						



Feeling good about your migration The Solution: Many Sources Converge ...



Feeling good about your migration The Solution: Static Enrichment ...



Enrichment information can often be prepared in advance

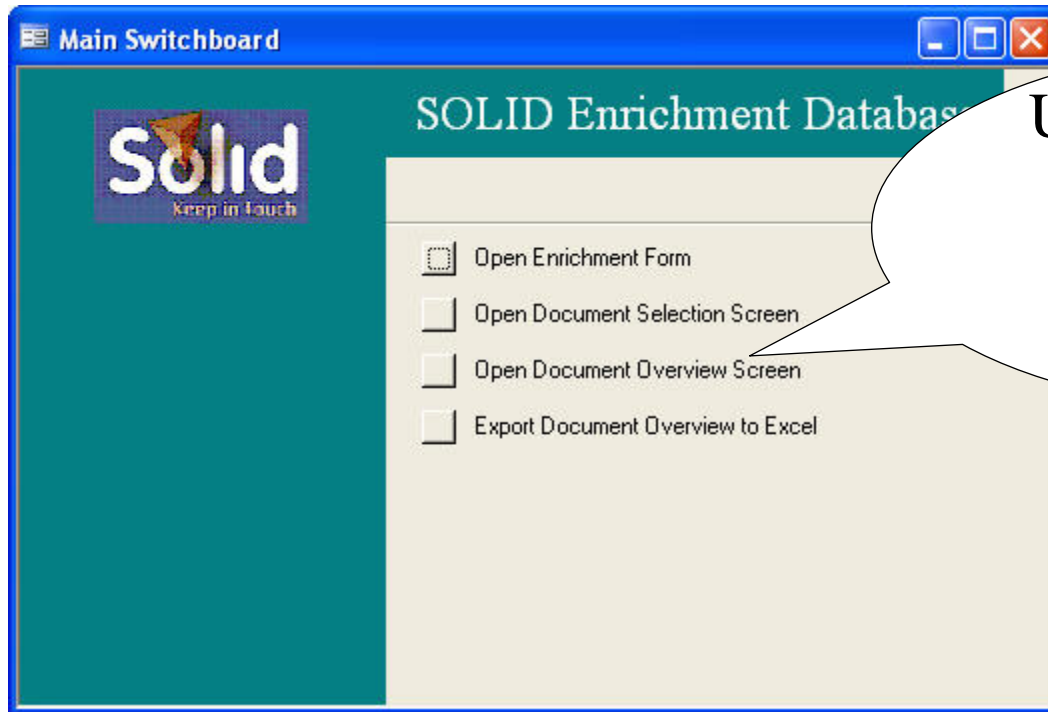
	C	D	E	F	G	H
1	Document Subtype	Document Unit	Title	Abbreviated Title	Authors	Owning Department
39	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 18	PCS - Film 18	Tammy Armstrong	SPI QB
40	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 20	PCS - Film 20	Tammy Armstrong	SPI QB
41	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 21	PCS - Film 21	Tammy Armstrong	SPI QB
42	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 24	PCS - Film 24	Tammy Armstrong	SPI QB
43	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 26.5	PCS - Film 26.5	Tammy Armstrong	SPI QB
44	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 29	PCS - Film 29	Tammy Armstrong	SPI QB
45	Non-Product Specifications (Packaging)	Components and Devices	Specification - Shrink Wrap Film 31	PCS - Film 31	Tammy Armstrong	SPI QB
46	Product Specifications	Packaging	Specification - Bottle - BALNEOL Perianal Cleansing Lotion	PCS - Bottle - BALNEOL	David Reed	SPI QB
47	Product Specifications	Packaging	Specification - Bottle - 16 oz HDPE Oblong	PCS - Bottle - 16 oz HDPE Oblong	Ken McKay	SPI QB
48	Product Specifications	Packaging	Specification - Bottle 16oz HDPE Oblong	PCS - Bottle 16oz HDPE Oblong	Tom Rebne	SPI QB
49	Product Specifications	Packaging	Specification - Bottle - 20oz HDPE Oblong	PCS - Bottle - 20oz HDPE Oblong	Tom Rebne	SPI QB
50	Product Specifications	Packaging	Specification - 16oz HDPE Oblong Bottle	PCS - 16oz HDPE Oblong Bottle	Tom Rebne	SPI QB
			Specification - Bottle - 40cc HDPE Round	PCS - Bottle - 40cc HDPE Round		



Feeling good about your migration
The Solution: Enrichment and Inspection



The Enrichment Application allows users to concentrate on their own areas of expertise and knowledge



Users select how to process the information



Feeling good about your migration The Solution: Enrichment Tool Form Interface



The Forms-based interface allows Business Users to inspect and enrich documents on a case-by-case basis

BDIS US SOP Data Enrichment Form

ID: 1018124 Name: BDIS US 1000004 Version: 1.5 - 27-APR-2004

Object Type: quality_mfg_document Title: QB-01/100.07: RESPONSIBILITIES OF QUALITY UNIT Owning Country: United States

Document Type: Governance Document Type: QB-01/100.07: RESPONSIBILITIES OF QUALITY UNIT Owning Site: Solvay Pharmaceuticals Inc.

Document Subtype: Local Procedures Subject: QB-01/100.07 Owning Department: SPI QB

Document Unit: Affected Areas: SPI QB*SPI QM*SPI QT*SPI QS

Document Subunit: Version: 1.0 Effective: CURRENT Document Lifecycle: GMP Controlled Legacy Document Number: QB-01/100.07 Year of Creation: 2004

Authors: Eubanks, Gretel Document Status: Effective Language: English

Planned Effective Date: 12/4/1998 12:00:00 Next BDIS Review: 12/4/2000 12:00:00 AM

Period Review Interval: 730 Next QDLD Review: 12/04/2000 12:00:00 AM

Content: Format: msw8
BDIS US\Master Document\SOP\QB - Q. A. Baudette Operations\BDIS US 1000004_1.0_msw8_0_0900044f80005926.doc Browse View

Rendition: Rendition format: pdf
BDIS US\Master Document\SOP\QB - Q. A. Baudette Operations\BDIS US 1000004_1.0_pdf_0_0900044f80005926.pdf Browse View

Record: 1 of 868

Read-only fields prevent mis-keying



Feeling good about your migration
The Solution: After further review ...



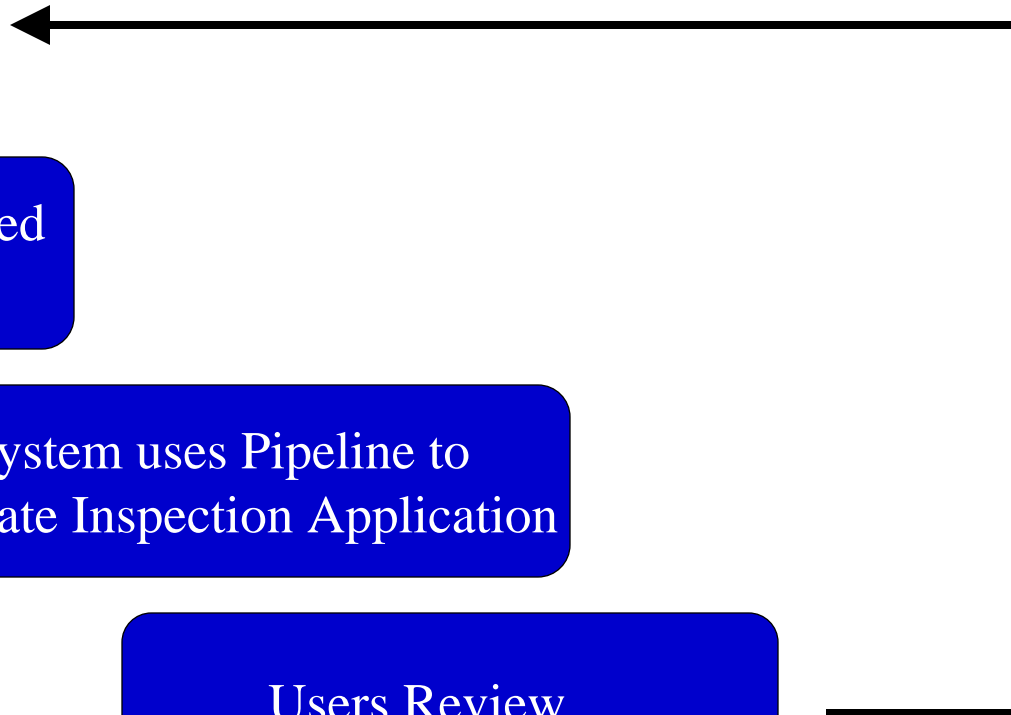
Users Refine Business Rules

Pipeline Generated Automatically

System uses Pipeline to generate Inspection Application

Users Review ...

Content Migrated to SOLID



Success!

- All migrations executed on time
- Spent only a fraction of the initial quotes
- 100% end-user satisfaction and trust level in migrated content
- No issues or delays during the migration to production
- 100% automated check on quality of migrated data
- Manufacturing migrations, system-based, have been completed and were very successful. R&D currently running, based around individual products
- “Migrations turned from a feared nightmare into a no-brainer” – *Frans Pleij, Manager EDM Knowledge Center, Solvay Pharmaceuticals*

Questions

EMC²
where information lives[®]





* Audio of this Presentation will be available at dm_developer, an online community for Documentum www.dmdeveloper.com

Register to win an iPod Nano from Blue Fish Development Group in Booth 530



✦ Presentations Will Be Available on the Momentum Las Vegas Website

www.momentumlive.com

Password: *jackpot*

More Questions? Meet the Speakers Mixers

Tuesday	6:00 pm – 7:00 pm	Solutions Expo Hall – Level 1
Wednesday	5:00 pm – 6:00 pm	Solutions Expo Hall – Level 1
Thursday	8:00 am – 9:00 am	South Pacific Ballroom – N. Conf. Center