



6 TIPS FOR A SEAMLESS DOCUMENT MIGRATION

TO **GREENLIGHT GURU**

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ABSTRACT

Best practices for migration of documents into Electronic Quality Management Systems (eQMS).

Christina Dooley

*Quality Assurance &
Regulatory Associate*
Globiox, Inc.

cdooley@globiox.com

Andrew Rossman

*Quality Assurance &
Regulatory General
Manager*
Globiox, Inc.

Globiox, Inc.

arossman@globiox.com

Greenlight Guru provides an Electronic Quality Management System (eQMS) for medical device companies to ensure quality standards are met without requiring that the end user be a 'quality guru'. Transitioning from a current system, whether it be paper based, a hybrid, or other eQMS provider, to the Greenlight Guru platform is a painless process when you have experienced experts on your team. Globiox's 6 Tips will ensure that your data migration does not become complicated, time-consuming, and fraught with unexpected challenges. Converting and merging documents, password-protections, and utilizing outsourced vendors are factors which can carry potential risks, result in wasted resources, and delay timelines.

Our expert team at Globiox has alleviated these risks by helping multiple customers to put these six strategies into practice for achieving a successful and timely migration. For more information on the migration process or these six tips, contact us at info@globiox.com.

Additionally, we offer complimentary hour-long consultations where we can answer some of your most pressing questions. Visit <https://globiox.com/> for more information.

1. Consider Timing

Timing is everything. Determining when to start migrating your documents will depend on overall preparedness, available resources, training, how your data export was completed, and other variables unique to your team.

For example, it may not be ideal to implement a new EQMS instance prior to an upcoming audit, or when you have limited staff available. However, if you are switching from a hybrid system with an upcoming validation, it may make sense to plan ahead so that your time can be spent validating the new system*, rather than wasting resources on keeping up with the old one.

**All Greenlight Guru releases come pre-validated at no additional cost for their customers, so long as the user accepts the completed Installation Qualification (IQ), Operational Qualification (OQ), and Performance Qualification (PQ).*

2. Carefully Establish a Protocol and Quality Plan

Establishing a quality plan and protocol for the process will be critical to ensure that all team members performing the work do so consistently and in a compliant manner. A well thought out protocol can be a make-or-break moment for not only your migration but also for future functionality of your QMS. There should be certain elements covered in your plans, including (but not limited to): rationale for the transition, defined objectives, validation for the system, an approach for outsourced vendors, training, and a breakdown of the organizational strategies for the migration process itself.

Additionally, developing a strategy for determining situations when it is necessary to combine or compress files, which files will need to be manipulated, and how you will identify those files in an organized fashion once the implementation begins, can save from headaches and backtracking.

A well-written protocol may be structured similarly to a work instruction, in that, it must be unambiguous to ensure that all parties are interpreting it the same way. However, it must also remain flexible so that it is feasible and practical for the team to implement.

3. Put Controls in Place

Having controls in place will be equally as important for your internal team as for any external resources employed for the migration.

That said, if you are providing direct access to your document repository via a server, protect your files by adding user-specific permissions based on individual roles / functions to ensure that content cannot be deleted, edited, or altered, intentionally, or unintentionally.

Further, if you are working with a third-party, you may have a few more items to consider as compared to an in-house migration. With external resources, give thought to how you will securely provide access credentials, what permissions you will allow for an external user in your production environment and server, and consider how you may provide controlled copies of documents, rather than original files for external use.

4. Define your Technical Hurdles

It is not uncommon for projects to encounter unanticipated hurdles. For one, the number of files to migrate and the given number of available staff could present a challenge. Secondly, the more obstacles you identify early on, the better off your team will be with regards to meeting deadlines and objectives. You need to consider how to approach file organization and limitations, such as, compressing or combining files in order to ensure a smooth implementation whether or not the project is internal or outsourced.

What file types and formats are your source documents?

What file types and formats are accepted by the system?

Do you have password-protected files?

Are security protocols for password-protected files included in your migration procedure?

Will conversion or merging be necessary?

Is there a plan in place for converting or merging files?

Which tools will you use to manipulate files, if necessary?

Are those tools considered secure and appropriate for handling protected information?

Do you have pending software updates?

Ensure to coordinate server and software updates with outside vendors. Communicate and notify third parties when these updates are happening to prevent delays.

It is beneficial to consider the handling of password-protected files. For instance, you might remove password protection from some of the files so that input information can be extracted

easily, or so that documents can be merged. Whether you prefer to provide passwords, or remove the encryption, this would be part of the preparatory steps. *

Luckily, Greenlight Guru's system can handle just about any file type, however, having a plan of action in these scenarios will help to move swiftly and stay on track.

**Must be included in your security protocols as well as your migration documentation.*

5. Prepare Documents Before Migration

Exporting documentation from a legacy system can be a lengthy and time-consuming process that can require expert knowledge (Globiox experts have over ten years' experience exporting from legacy systems if you run into issues). Once you have the export successfully completed, how you prepare / organize documents for your team will depend on the structure of your organization and the state of your files for import. Moreover, your preparations can be based on what technical issues were identified in Tip #4.

Have you compiled members of your team from Quality and IT?

Will you outsource, or will the work be performed in-house?

Are your files organized in batches by relevance, document ID or by department?

Will you be importing legacy documents as well as effective documents?

Do you have a plan in place for routing document types of differing status?

You can avoid the need for course-correcting during the process by organizing your files, compiling information, and tailoring it for your team before starting. Thus, it is recommended to combine, manipulate, and group documents in batches based on how they will be implemented during the migration.

6. Perform a Test Run

A trial will bring to light slow points, difficulties with file type / format / size, and can aid in confirming an overall timeline for the project. Performing a test run may be the means to alleviating your technical hurdles, and it is an easy way to work out any kinks before the full migration process.

In summary, a successful migration is built through thoughtful planning, with careful consideration given to your team's needs and migration goals. Timing, protocol development, establishing controls, defining technical challenges, preparing your documents, and performing a test run are all key steps in the preparation process and ensuring a seamless document migration to your new quality system.

Need more help or have something particular in mind?

Some things are better left to the experts.

Globiox has over ten years' experience with EQMS platforms and performing data migration services. We are a certified partner of Greenlight Guru, so you can trust our guidance as lessons learned from real world practice. Our team can help you adhere to your timelines, save you resources, and optimize your Quality Management System.

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