

Qualio document migration guide

Tips and best practice for moving your
existing document stack into Qualio

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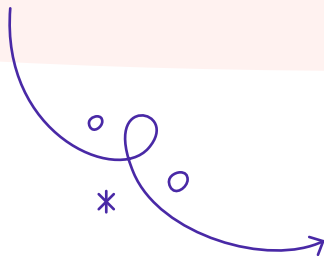
New Qualio customers typically have at least some pre-existing QMS documentation which can't be ignored. Pulling this document stack into Qualio is a crucial early task during your onboarding.

But sourcing your existing documents - and determining what to migrate over - can be a confusing and time-consuming process. The customer success team has assembled this guide, full of tips, hints and best practice, to map out and simplify the process for you and help you on your way to a structured and speedy onboarding.



Erin Burke

Director of Customer
Onboarding & Enablement



1. Source everything

You're probably turning to Qualio to improve on your current document management system. Typically our customers move from manual, paper-based document stacks, or cluttered digital libraries scattered across multiple systems and repositories.

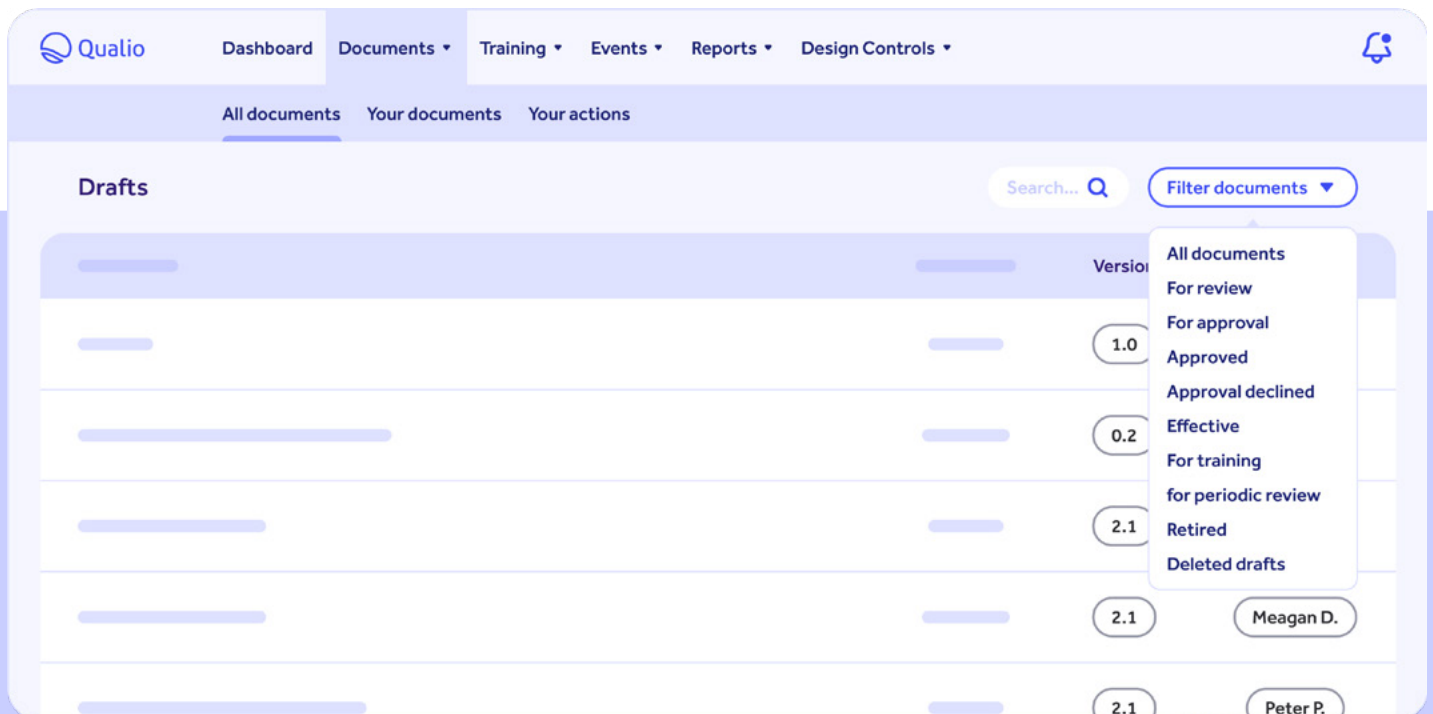
Needless to say, this makes sourcing and retrieving information difficult – and customers sometimes require some guidance of exactly *which* documents they're looking for to migrate over. And with a cluttered legacy system, simply forgetting some crucial documents for the migration isn't impossible. We've put together a 'shopping list' of the common document types we work with to help you.

- SOPs
- Work instructions
- Policies
- Procedures
- Quality manuals
- Quality records
- Proposals
- Instructions and guidelines
- Product documents
- Employee files and records
- Standards and regulatory documents
- Risk management files
- Internal audit plans, files and reports
- Test reports
- Installation qualification (IQ) or other validation documents
- Risk management indices
- Supplier qualification forms
- Other supporting documents

Set aside a whole work day to delve into filing cabinets, OneDrive folders, email threads, and wherever else your legacy documents live, paying close attention to types and categories of documents as you go.



Top tip: Don't go it alone. Manual legacy document management systems naturally lead to colleagues squirreling away their day-to-day documents in private areas for easy access. Involve as many people as you can in your document search to ensure nothing valuable is missed, and encourage colleagues to come forward without fear of punishment to share their document 'stashes' – however non-compliant they may be!



2. Focus, focus, focus

A 2022 [Harvard Business Review study](#) found that whenever we strive to introduce change into our personal or professional lives, our first instinct is to *add* something.

In the context of your old, manual document management system, this natural impulse can lead to continuously growing heaps of uncontrolled, unmanageable and untraceable spreadsheets and records, which bring snowballs of risk and time consumption with them.

Your Qualio migration is the perfect time to take a step back, reverse this habit and start fresh with a concise, uncluttered and lean core of indispensable documentation.

So once you've sourced all your documents, it's time for a spring clean! Prioritize *only* documents which are:

- Effective and 'live'
- Relevant to your current operation and ways of working
- Version-controlled

Don't be afraid to leave historical documents where they are and let the Qualio team migrate only the core of documents which fit this bill. Applying a 'line in the sand' approach to your migration will reduce the burden on your team when it comes to gathering documentation.

In your legacy system, it's likely that documents which are theoretically of the same 'type' are nevertheless structured differently as new formats are introduced and retired over time. Pinpoint the optimal template format for each document type and whittle away the others. Going forward, Qualio will automatically keep these templates aligned for your document types so structure can be consistently maintained.



Top tip: An optimal eQMS has between 10 and 20 document templates. Any more is excessive and probably unnecessary.

3. *Get help if needed*

We understand that our customers often have limited internal resources and are balancing their Qualio migration tasks with day-to-day demands like audit prep, product realization and getting to market.

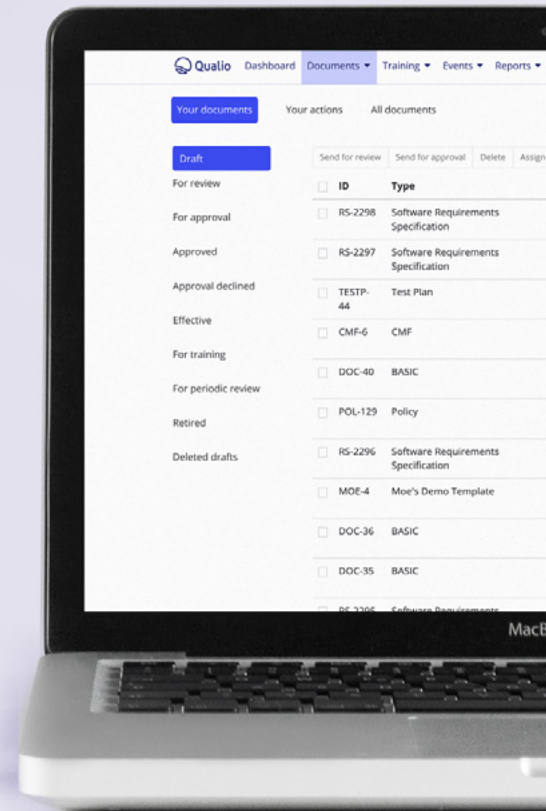
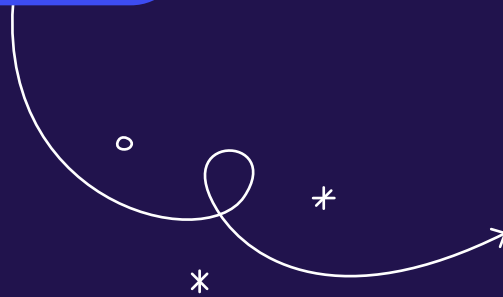
As quality management experts, we work with a series of seasoned industry partners who can help you on your migration journey. From helping you source documents to auditing your stack and preparing your migration bundle, our partners are standing by to accelerate your migration pathway.

Contact your Qualio onboarding manager if you require help, and they'll be happy to put you in touch straight away.



The #1 cloud-based quality management system for life sciences

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Call us today

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