



A practical guide to QMS migration

How to decide what moves, protect critical information
and prepare for a successful transition

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Bring up the word migration and people automatically start asking questions. Rightfully so.

Migrations can be difficult, and everyone has the same worries about them, such as:



**Losing
historical data**



**Disrupting
operations**



**Integrating
existing
systems**



**Adding work
to internal
teams**

Any time you replace a legacy QMS or even transition from manual processes and spreadsheets to a QMS, you risk disrupting operations. However, with a structured migration process, import tools and experienced guidance, you can preserve the information you need while transitioning without unnecessarily disrupting your business.

The rest of this guide details how we run a migration for [Octave Reliance](#), but the general advice can be used for any quality data migration.

Start with what instead of how

One of the biggest misconceptions about QMS migration is that everything in the existing system needs to move. Before migrating data, you should determine what information your organization needs from the start.

That could include:

- Active documents and SOPs
- Historical document revisions
- CAPAs and other quality records
- Change controls
- Training information
- Supplier information
- Users, groups and locations
- Forms and attachments

Some organizations might need extensive historical information available within the QMS immediately while others may determine that active records should migrate and older information should remain available through an archive.

What works for you depends on your regulatory and operational requirements. Migrating unnecessary files creates unnecessary work, so keep the list short. If you have 20 years of information and you migrate all of it, that can increase the amount of data you need to extract, clean, map, test and validate later. Worse, the time you spend on it might not create added business value.

The best migration is not necessarily the biggest migration. It is the one that preserves the information your organization needs.

What happens during a QMS migration?

Although every organization is different, most migrations occur in five stages.

01 Discover

Start by understanding what you have.

Where does quality information live today? It could be in another electronic QMS, SharePoint, network drives, spreadsheets, paper processes or several systems at once.

Identify the records, metadata, attachments, users and relationships that may need to move.

This is also where hidden complexity tends to surface. You may discover inconsistent department names, obsolete records, duplicate information or processes that evolved differently across locations.

Finding those issues before migration gives you the opportunity to resolve them instead of reproducing them in a new system.



02 Decide

Determine what should move and what should not.

Questions to answer include:

- How much history needs to remain readily available?
- Which document revisions need to migrate?
- Which obsolete records can remain archived?
- Should existing document and record numbers be preserved?
- How should inactive users be handled?
- Which metadata needs to be standardized?

These are business and quality decisions, and knowing the answers to these questions can help you decide what to move.

We help organizations work through these questions based on the information available, the desired Reliance configuration and the migration approach.

03 Prepare

Once the scope is established, the data needs to be prepared.

This can include cleaning records, standardizing metadata, confirming owners and approvers, organizing attachments and mapping information from the source system to Octave Reliance.

Octave Reliance provides structured import tools and templates that help define how source information will enter the platform.

For example, an organization may need to map existing:

- Document number to Reliance record identifier
- Department to Reliance organizational structure
- Document type to Reliance document classification
- CAPA category to Reliance CAPA field

This structured approach reduces the need to manually recreate records one at a time and provides a repeatable framework for moving information into the new environment.

04 Validate

Migration should not depend on hoping that everything works correctly during the final cutover.

Data can be tested before production migration so the organization and implementation team can identify problems while there is still time to correct them.

Depending on the migration, this can include checking:

- Record counts and fields
- Metadata
- Attachments
- Historical information
- Security and permissions
- Workflows
- Record relationships

Sample imports can help uncover unexpected source-data problems or mapping issues before the full production migration.

Validation creates a safety net between the old environment and the new one.

05 Launch

After testing and validation, you can complete the production migration and transition users to Octave Reliance.

The objective is to preserve the information people need while establishing Reliance as the environment for new quality activity.

Migration planning can also account for how and when different processes transition, helping organizations avoid treating the entire implementation as a single all-or-nothing event.

Four questions quality leaders ask before migrating

Earlier, we covered some of the most common concerns organizations have about migrating quality data. Those concerns often lead to practical questions about what happens to existing records, attachments, numbering and connected systems. Here are four questions quality leaders commonly ask before migrating.

01 Will we lose our historical data?

Historical information can be included in the migration strategy when the organization needs it.

The more important question is which history should move.

Organizations can evaluate active records, previous revisions, attachments and historical metadata based on their retention, compliance and operational requirements.

Older information that does not need to reside in the active QMS may potentially remain archived and accessible rather than increasing the scope of the migration.

The decision should be made deliberately before data preparation begins. Either way, you retain all the data you want to retain.

02 Do we have to change our existing numbering?

Not necessarily.

Existing identifiers can be an important part of traceability, particularly when document numbers, CAPA identifiers and other record IDs are referenced throughout the business.

Octave Reliance supports migration of legacy information and configurable approaches to numbering. During migration planning, the existing structure can be evaluated to determine what should be preserved and where a new numbering approach makes sense.

A migration does not have to mean erasing the language your organization has used to identify its records.

03 What happens to attachments?

The record itself is often only part of the story.

Quality records may include PDFs, Word documents, forms, evidence, technical files and other supporting materials. Migration planning therefore needs to account for both structured record data and the files associated with those records.

Octave Reliance supports structured processes for migrating attachments and associating them with the appropriate records.

During testing, those relationships can be verified before production launch.

04 What about our ERP, PLM, MES, LMS and other systems?

Changing the QMS does not necessarily mean replacing the systems surrounding it.

Octave Reliance supports multiple approaches for exchanging information with other business systems, including APIs, connection profiles, structured imports, file-based integrations and available connectors.

Depending on the organization's architecture, integrations can support use cases involving systems such as ERP, PLM, MES, CRM, LMS and SharePoint.

For example, quality processes may need information from enterprise systems while approved quality documents may need to feed downstream repositories or training processes.

The important step is identifying those dependencies early so integration requirements become part of implementation planning rather than a surprise discovered before launch.

Who does what?

Successful migrations are collaborative.

Your team brings something an outside implementation team cannot: knowledge of your data, processes and business requirements.

Octave Reliance brings migration experience, platform knowledge, structured tools and implementation guidance.

Your organization	Example authoritative data
Identify the information that matters	Help structure the migration approach
Determine retention requirements	Provide migration guidance and templates
Review and clean source data	Support data mapping and imports
Confirm business requirements	Help configure Reliance around those requirements
Review migrated information	Support testing and validation
Prepare users for transition	Support implementation and launch

This division of responsibility is important for a successful migration. A migration is most predictable when technology decisions are handled alongside the people who understand what the information means.

What can you do before your migration begins?

You don't need to wait for implementation to start preparing.

Take an inventory of where quality information currently lives.

Then identify obvious inconsistencies:

- Where are duplicate records?
- Which records are obsolete?
- Which metadata fields are unreliable?
- Which naming conventions differ between locations?
- Which historical records must remain immediately accessible?
- Which systems exchange information with your QMS today?

This exercise can expose migration decisions early and make implementation planning more productive. It can also reveal an opportunity that is easy to overlook.

Remember, migration is not only about preserving the past. It's also an opportunity to decide what from the past is worth carrying forward.



A more predictable path forward

Every QMS migration requires decisions, planning and effort.

The difference between a disruptive migration and a manageable one often comes down to how much uncertainty is removed before production data starts moving.

Define what needs to migrate. Clean and prepare it. Map it, test it and validate the results. Once you're satisfied, make the transition.

A company may begin a QMS project to solve a specific problem, then find additional gains once information is easier to locate, workflows are connected and employees spend less time chasing records across disconnected systems.

The goal isn't simply to migrate your data but instead to create the bridge between the quality environment you have today and the one you want to operate.

With Octave Reliance, that bridge can be planned, tested and crossed without leaving the quality information your organization depends on behind.



In our experience, organizations often emerge from the process with more than a replacement for the system they left behind. Research conducted by Hobson & Company with Octave customers found measurable improvements after implementing Octave Reliance, including:



30% less
time spent
supporting external
audits



30% less
time spent
managing customer
complaints



20% less
time spent
scheduling, planning
and reporting audits



10% less
time spent on
document revisions,
review and
approval

The same research modeled annual benefits exceeding \$2.4 million for a \$1 billion life sciences organization, with a 2.6-month payback period and 634% three-year ROI.

Conclusion

A QMS migration should protect the information your organization depends on while creating an opportunity to improve how quality operates going forward. With the right preparation, tools and support, you can make that transition without leaving valuable data behind or unnecessarily disrupting the business.

The result isn't simply a successful migration. It's a quality environment built to deliver more value long after the migration is complete.

If you're looking at migrating from your current QMS or manual processes and want to explore more about Octave Reliance for your business, schedule some time with us. We'll create a demo for your specific use case.

[Schedule a demo](#)



About Octave

Octave is a leader in enterprise software, turning data into decisive action and intelligence into your edge. Our software solves for and simplifies complexity, from the design and build to operations and protection of people, property and assets – for any scope, at any scale. For decades, we’ve partnered with customers to sharpen performance, elevate efficiency and amplify results. From factory floors to entire cities, our solutions are tuned to scale up what’s possible from day one onward.

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