

APPLICATION ESTATE REFERENCE

Application estate system reference

Prepared for

Vantage Medical Devices · application estate review

EXECUTIVE SUMMARY

Scope of this record

This record documents **12 business systems** across the application estate of Vantage Medical Devices — spanning its Devices, Components, and Corporate groups and covering ERP, PLM and CAD, quality management, laboratory, enterprise content, CRM, IT service management, collaboration, HR and payroll, and manufacturing execution. Each system is profiled individually — what it is, how it is deployed, the vendor behind it, the data it holds, and its lifecycle and retention profile. It is a factual reference; it does not recommend replacement, migration, or retirement, which are decisions for the organization and its advisors.

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SYSTEMS PROFILED

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TIER-1 CRITICAL

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ON-PREMISE

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REGULATED (PART 11)

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LONG-RETENTION DATA

Two systems are recorded as lifecycle-limited while holding long-retention data — the legacy **Infor Baan IV** ERP and the in-house **ShopTrack** manufacturing system. Several more hold regulated records with long statutory retention. These lifecycle and retention facts are captured per system so downstream planning starts from an accurate baseline.

HOW THIS WAS BUILT

Method

01

Decentralized capture

System owners across the organization entered their own systems and data volumes through Scout — no AI access required to contribute.

02

AI enrichment

Each system was researched to add vendor, lifecycle, architecture and retention context. Sources are listed within every profile.

03

Reference record

Scout compiled the result into this per-system reference. Facts only; analysis and decisions are left to the reader.

SYSTEM INDEX

The 12 systems in this record

#	CATEGORY	PRODUCT	GROUP	DEPLOYMENT	TIER	PROFILE FLAGS
1	Enterprise resource planning	Epicor Kinetic	Devices	Cloud SaaS	1	CLOUD SAAS ACTIVELY SUPPORTED
2	Product lifecycle management	PTC Windchill + Creo	Devices	On-prem	1	ON-PREM REGULATED (21 CFR PART 11)
3	Quality management	MasterControl	Devices	Cloud SaaS	1	CLOUD SAAS REGULATED (21 CFR PART 11)
4	Collaboration & productivity	Microsoft 365	Corporate	Cloud SaaS	1	CLOUD SAAS
5	IT service management	ServiceNow	Corporate	Cloud SaaS	2	CLOUD SAAS
6	Manufacturing execution	ShopTrack (in-house)	Devices	On-prem	1	HOMEGROWN NO VENDOR SUPPORT
7	Enterprise resource planning	Infor Baan IV	Components	On-prem	1	LEGACY APPROACHING END-OF-SUPPORT
8	Laboratory information management	LabWare LIMS	Components	On-prem	1	ON-PREM REGULATED (21 CFR PART 11)
9	Customer relationship management	Salesforce Sales Cloud	Components	Cloud SaaS	2	CLOUD SAAS

#	CATEGORY	PRODUCT	GROUP	DEPLOYMENT	TIER	PROFILE FLAGS
10	Quality management	ETQ Reliance	Components	Cloud SaaS	1	CLOUD SAAS REGULATED (21 CFR PART 11)
11	Enterprise content management	OpenText Documentum	Components	On-prem	2	LEGACY ON-PREM
12	Payroll & HR	ADP Workforce Now	Corporate	Cloud SaaS	1	CLOUD SAAS

Flags are neutral, factual tags. **Legacy** / **end-of-support** / **homegrown** describe lifecycle; **Regulated (Part 11)** and **long-retention data** describe compliance and retention. No flag implies a recommendation.

Enterprise resource planning

Epicor Kinetic · Devices division

CLOUD SAAS **ACTIVELY SUPPORTED**

DEPLOYMENT	CRITICALITY	USERS	ANNUAL	RENEWAL	OWNER
Cloud SaaS	Tier 1	420	\$380k	Mar 2027	J. Halloran, IT

Overview. Epicor's cloud-first ERP for discrete and mixed-mode manufacturers — finance, order-to-cash, procurement, inventory, production and MRP. Vantage's system of record for financials and manufacturing operations.

Lifecycle & support. Current major release on an active, cloud-delivered roadmap with a regular update cadence; no published end-of-support horizon.

Architecture. Microsoft Azure-hosted SaaS with a SQL Server data tier; REST and Epicor Functions APIs; browser and mobile clients.

Integrations. EDI for trading partners; consumes released BOMs from Windchill; feeds Power BI; shop-floor data collection.

Retention. Active cloud system of record; data remains live with REST and bulk export available. Standard financial-records retention applies to GL and tax data.

Compliance. SOX-relevant financial controls; SOC 2 (vendor-attested).

VENDOR & PRODUCT FACTS

Vendor	Epicor Software
Ownership	Clayton, Dubilier & Rice (2020)
Vendor M&A	Bolt-on acquisitions under CD&R
Current line	Kinetic (cloud)
This product	Current release
End-of-support	None — evergreen SaaS
Install base	Large mid-market manufacturing

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Sales orders	1.2M	Yes
AR / AP invoices	900k	Yes
Inventory items	42k	Yes
GL transactions	6M+	Yes
Customers	9k	Shared

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

<> **Custom migration — API**
Move financial and operational data into the replacement ERP via Epicor's REST APIs and Functions. **Applies here:** strong — modern, well-documented API surface.

⬆ **Vendor-native export**
Use Epicor's built-in data export and reporting to extract records in bulk. **Applies here:** available for standard objects.

📄 **Snapshot — STG** **SUNSET POINT**
Capture records as screenshots and reports in a governed, queryable archive — ready to seed a successor or stand as the retained record. **Applies here:** lower — actively supported and typically retained. [Learn more about STG](#) ↗

SOURCES

- Epicor Kinetic product documentation and cloud release cadence
- Epicor ownership history (CD&R, 2020)

Product lifecycle management

PTC Windchill + Creo · Devices division

ON-PREM **REGULATED (21 CFR PART 11)**

DEPLOYMENT On-prem	CRITICALITY Tier 1	USERS 180	ANNUAL \$240k	RENEWAL Sep 2026	OWNER R. Iyer, Engineering
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Overview. Enterprise PLM managing CAD data, parts, BOMs, and engineering change; paired with Creo for 3D CAD. Vantage's engineering system of record for design and controlled engineering documentation.

Lifecycle & support. Actively supported; PTC ships annual Windchill releases with defined support windows. The current install trails the latest by two generations.

Architecture. On-prem Windows server with an Oracle/SQL Server database and a file vault for CAD content; Java server; thick and web clients; large binary storage.

Integrations. Publishes released BOMs to Epicor; CAD authoring via Creo; viewing via Creo View; Entra ID SSO.

Retention. Controlled engineering records form part of the device design history and carry long retention. CAD vault extraction requires PLM-aware tooling, not a raw dump.

Compliance. FDA 21 CFR 820.30 design controls; Part 11 e-signatures on engineering changes.

VENDOR & PRODUCT FACTS

Vendor	PTC (NASDAQ: PTC)
Ownership	Public
Vendor M&A	Onshape (2019), Arena (2021), ServiceMax (2023)
Current line	Windchill / Creo
This product	Supported, trails latest by 2
End-of-support	Per-release support windows
Install base	Large discrete-manufacturing PLM

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
CAD documents	460k	Yes
Parts	120k	Yes
BOMs	14k	Yes
Change notices	38k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

-  **Re-platform — vendor upgrade**
Upgrade to PTC's current Windchill release, staying with the vendor. **Applies here:** available — the install trails the latest by two releases.
-  **Custom migration — API**
Move parts, BOMs and CAD metadata via Windchill's REST / Info*Engine services. **Applies here:** moderate — CAD vault content is linked to metadata.
-  **Snapshot — STG** **SUNSET POINT**
Capture design-history records as screenshots and reports in a governed archive — ready to seed a successor PLM or stand as the retained record. **Applies here:** moderate — controlled engineering records carry long retention. [Learn more about STG](#)

SOURCES

- PTC Windchill support lifecycle and release notes
- PTC acquisition history (Onshape, Arena, ServiceMax)
- FDA design-control (21 CFR 820.30) references

Quality management

MasterControl · Devices division

CLOUD SAAS **REGULATED (21 CFR PART 11)**

DEPLOYMENT Cloud SaaS	CRITICALITY Tier 1	USERS 250	ANNUAL \$150k	RENEWAL Jan 2028	OWNER Quality
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Overview. Validated cloud QMS for life sciences — document control, training, CAPA, change control, nonconformance. Vantage's quality system of record.

Lifecycle & support. Actively supported validated SaaS; the vendor supplies validation packages and a controlled update cadence.

Architecture. Vendor-hosted validated cloud; browser client; REST APIs; Entra ID SSO.

Integrations. Links to Windchill for controlled engineering documents; SSO via Entra ID.

Retention. Quality records carry multi-year regulatory retention with audit-trail integrity. Validated SaaS retains records live with controlled export.

Compliance. 21 CFR Part 11; ISO 13485; GxP.

VENDOR & PRODUCT FACTS

Vendor	MasterControl
Ownership	Private, PE-backed
Current line	MasterControl cloud QMS
This product	Current (validated SaaS)
End-of-support	Evergreen
Install base	Strong in life sciences

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Controlled documents	36k	Yes
Training records	210k	Yes
CAPAs	4.8k	Yes
Change controls	7.2k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

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Custom migration — API
Move controlled documents, training and CAPA records via MasterControl's REST APIs. **Applies here:** strong — validated API surface.

⤴

Vendor-native export
Use MasterControl's export and reporting to extract quality records with audit trail. **Applies here:** available for validated records.

📄

Snapshot — STG **SUNSET POINT**
Capture quality records as screenshots and reports in a governed, audit-ready archive — ready to seed a successor QMS or stand as the retained record. **Applies here:** moderate — regulated records often retained even when live data migrates. [Learn more about STG](#) ↗

SOURCES

- MasterControl product and validation documentation
- ISO 13485 / 21 CFR Part 11 compliance datasheets

Collaboration & productivity

Microsoft 365 · Corporate

CLOUD SAAS

DEPLOYMENT	CRITICALITY	USERS	ANNUAL	RENEWAL	OWNER
Cloud SaaS	Tier 1	480	\$170k	Annual	IT

Overview. Email (Exchange Online), Teams, SharePoint and OneDrive, and the Office apps. Vantage's primary productivity suite and identity backbone.

Lifecycle & support. Evergreen SaaS, continuously updated; no end-of-support horizon.

Architecture. Microsoft-hosted cloud; Entra ID identity; Microsoft Graph API.

Integrations. Identity provider for most SaaS via SSO; Teams telephony; Power BI.

Retention. Governed by Microsoft 365 retention policies with eDiscovery and legal hold available.

Compliance. SOC 2 / ISO 27001 (vendor); configurable retention and legal hold.

VENDOR & PRODUCT FACTS

Vendor	Microsoft (NASDAQ: MSFT)
Ownership	Public
Current line	Microsoft 365 (evergreen)
End-of-support	Evergreen
Install base	Ubiquitous

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Mailboxes	480	Yes
SharePoint sites	320	Yes
Documents (OneDrive / SP)	3.1M	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

<> **Custom migration — API**
Move mail, files and sites via Microsoft Graph and tenant-to-tenant migration tooling. **Applies here:** strong — mature Graph API and migration ecosystem.

⬆ **Vendor-native export**
Use eDiscovery and content export for mailboxes and sites. **Applies here:** available with legal hold.

📄 **Snapshot — STG** SUNSET POINT
Capture selected records as screenshots and reports in a governed archive. **Applies here:** lower — evergreen platform, usually consolidated tenant-to-tenant. [Learn more about STG](#) ↗

SOURCES

- Microsoft 365 service descriptions and retention documentation

IT service management

ServiceNow · Corporate

CLOUD SAAS

DEPLOYMENT Cloud SaaS	CRITICALITY Tier 2	USERS 60	ANNUAL \$120k	RENEWAL Oct 2026	OWNER IT
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Overview. IT service management — incident, problem, change and a CMDB — on the Now Platform. Vantage's IT operations backbone.

Lifecycle & support. Evergreen SaaS on the Now Platform with twice-yearly named releases; actively supported.

Architecture. Vendor-hosted per-instance cloud; REST and SOAP APIs; scoped applications.

Integrations. Discovery populates the CMDB; SSO; integrations to monitoring tooling.

Retention. Operational data; table-level export and APIs support extraction and archival.

Compliance. SOC 2; configurable data retention.

VENDOR & PRODUCT FACTS

Vendor	ServiceNow (NYSE: NOW)
Ownership	Public
Current line	Now Platform
This product	Current (N-1 supported)
End-of-support	Two releases back
Install base	Enterprise ITSM leader

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Incidents (annual)	72k	Yes
Configuration items	24k	Yes
Change requests	9k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

<> Custom migration — API

Move incidents, CMDB and change records via ServiceNow's REST / Table APIs. **Applies here:** strong — comprehensive REST API.

⤴ Vendor-native export

Use table export and reporting for bulk extraction. **Applies here:** available per table.

📄 Snapshot — STG SUNSET POINT

Capture operational records as screenshots and reports in a governed archive. **Applies here:** lower — actively supported; relevant if the instance is decommissioned. [Learn more about STG](#)

SOURCES

- ServiceNow Now Platform documentation and release lifecycle

Manufacturing execution

ShopTrack (in-house) · Devices division

HOMEGROWN NO VENDOR SUPPORT KEY-PERSON RISK LONG-RETENTION DATA

DEPLOYMENT	CRITICALITY	USERS	ANNUAL	RENEWAL	OWNER
On-prem	Tier 1	140	Internal	n/a	Unassigned

Overview. An in-house manufacturing execution and shop-floor tracking application built internally over roughly twelve years. Records work orders, operation sign-offs, and device history record (DHR) data for production traceability. No commercial vendor.

Lifecycle & support. Unsupported by any vendor and maintained by a single long-tenured developer. No formal release process, test suite, or documented data model, on an out-of-support framework. A standing continuity risk regardless of any system changes ahead.

Architecture. A VB.NET thick client over an on-prem Microsoft SQL Server database, with direct table access and a minimal API surface; integrations are database-level.

Integrations. Reads routing data from the ERP via nightly SQL jobs; no modern API; reporting is direct SQL against the database.

Retention. Production and device-history data support device traceability and must be retained for regulatory and warranty periods. The data model is undocumented and the platform unsupported.

Compliance. Holds records relevant to FDA 21 CFR 820 (device history); no built-in audit-trail controls.

VENDOR & PRODUCT FACTS

Vendor	In-house (none)
Ownership	n/a
Current line	n/a
This product	Unsupported, single-developer
End-of-support	Framework out of support
Install base	Single company

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Work orders	1.4M	Yes
Operation records	9.8M	Yes
Device history records	640k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.



Replace — commercial MES

Adopt a supported commercial MES for shop-floor operations going forward. **Applies here:** worth considering — no vendor or support today.



Custom migration — SQL / ETL

Extract work orders and device-history data directly from the SQL Server database. **Applies here:** the only migration route — no usable API, and the schema is undocumented.



Snapshot — STG SUNSET POINT

Capture every record as screenshots and reports in a governed, queryable archive — preserving device-history traceability without keeping the unsupported system running. **Applies here:** strong — undocumented, unsupported, retention-critical. [Learn more about STG](#)

SOURCES

- Internal system notes (no vendor documentation available)
- Application framework end-of-support references
- FDA 21 CFR 820 device-history references

Enterprise resource planning

Infor Baan IV · Components division

LEGACY APPROACHING END-OF-SUPPORT LONG-RETENTION DATA

DEPLOYMENT On-prem	CRITICALITY Tier 1	USERS 300	ANNUAL \$180k maint.	RENEWAL Extended support	OWNER M. Okonkwo, IT
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Overview. A legacy on-prem ERP (originating with Baan, now under Infor) covering finance, manufacturing and distribution. Vantage's financial and operational system of record for 12+ years. Infor's current line has moved to LN and CloudSuite.

Lifecycle & support. Several generations behind Infor's current LN / CloudSuite. Mainstream support has ended; maintained under extended or third-party support. No in-place upgrade preserves the current configuration — moving forward means migration.

Architecture. On-prem Unix/Windows with an Oracle or Informix data tier; character-based and early web clients; heavily customized 4GL (Baan Tools); integration by flat file and direct database.

Integrations. Flat-file interfaces to banking and tax; direct database extracts feed reporting; limited modern API surface.

Retention. Holds 12+ years of general-ledger, tax and transactional history under statutory financial-records retention. Customized 4GL structures and legacy encodings mean the history must be interpreted, not simply exported.

Compliance. Financial-records retention (tax and audit); SOX-relevant for the combined entity.

VENDOR & PRODUCT FACTS

Vendor	Infor
Ownership	Koch Industries (2020)
Product lineage	Baan → SSA Global → Infor
Current line	Infor LN / CloudSuite
This product	Legacy generation
End-of-support	Mainstream ended; extended / third-party only
Install base	Shrinking legacy base

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
GL transactions	14M+	Yes
Invoices (AR / AP)	3.1M	Yes
Sales / purchase orders	2.3M	Yes
Item master	61k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

-  **Re-platform — vendor upgrade**
Migrate to Infor's current LN / CloudSuite line, replacing the legacy Baan generation. **Applies here:** available — Infor's forward path from Baan.
-  **Custom migration — SQL / ETL**
Extract GL, master and transactional data at the database / flat-file level. **Applies here:** the practical route — modern API surface is limited.
-  **Snapshot — STG** SUNSET POINT
Capture the ledger and transactional history as screenshots and reports in a governed archive — ready to seed the successor ERP or stand as the retained financial record. **Applies here:** strong — legacy platform with 12+ years of audit-retention data. [Learn more about STG](#) ↗

SOURCES

- Infor product lifecycle (Baan / LN / CloudSuite)
- Baan IV architecture and Baan Tools references
- Statutory financial-records retention guidance

Laboratory information management

LabWare LIMS · Components division

ON-PREM **REGULATED (21 CFR PART 11)** LONG-RETENTION DATA

DEPLOYMENT	CRITICALITY	USERS	ANNUAL	RENEWAL	OWNER
On-prem	Tier 1	60	\$95k	Nov 2026	Laboratory

Overview. Manages laboratory samples, tests, results and instrument data for Vantage's quality laboratory. The system of record for analytical and quality results.

Lifecycle & support. An actively supported commercial LIMS; the current on-prem install is one major version behind the vendor's latest — supported but upgrade-eligible.

Architecture. On-prem Oracle-backed LIMS with LIMS Basic customizations; instrument integrations via interfaces and middleware.

Integrations. Instrument and HL7 interfaces; feeds quality data to the QMS; label printing.

Retention. Regulated quality and laboratory results carry long statutory retention with audit-trail integrity; retention-critical regardless of any application change.

Compliance. 21 CFR Part 11; ISO 17025 / 13485; data integrity (ALCOA+).

VENDOR & PRODUCT FACTS

Vendor	LabWare
Ownership	Private, employee-owned
Current line	LabWare LIMS / ELN
This product	One major version behind
End-of-support	Supported; upgrade-eligible
Install base	Large regulated-industry LIMS

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Results	18M	Yes
Samples	2.1M	Yes
Tests	5.4M	Yes
Instruments	180	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.



Re-platform — vendor upgrade

Upgrade to LabWare's current LIMS release, staying with the vendor. **Applies here:** available — the install is one major version behind.



Custom migration — API

Move samples, tests and results via LabWare's interfaces and APIs. **Applies here:** moderate — instrument and LIMS Basic customizations add work.



Snapshot — STG

SUNSET POINT

Capture regulated results as screenshots and reports in a governed, audit-ready archive — ready to seed a successor LIMS or stand as the retained record. **Applies here:** strong — 18M+ regulated results with long statutory retention. [Learn more about STG](#)

SOURCES

- LabWare product documentation
- Laboratory data-integrity and retention guidance

Customer relationship management

Salesforce Sales Cloud · Components division

CLOUD SAAS

DEPLOYMENT Cloud SaaS	CRITICALITY Tier 2	USERS 75	ANNUAL \$130k	RENEWAL Apr 2027	OWNER Commercial
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Overview. Manages accounts, contacts, opportunities and pipeline for Vantage's commercial team. The cloud CRM system of record.

Lifecycle & support. Evergreen multi-tenant SaaS with three seasonal releases a year; actively supported.

Architecture. Salesforce multi-tenant cloud; REST and Bulk APIs; declarative plus Apex customization.

Integrations. Email and calendar sync; marketing tooling; API sync of accounts with the ERP.

Retention. Live cloud data; the Bulk API and data-export service support extraction and archival.

Compliance. SOC 2 / ISO 27001 (vendor); configurable field history.

VENDOR & PRODUCT FACTS

Vendor	Salesforce (NYSE: CRM)
Ownership	Public
Vendor M&A	Tableau (2019), Slack (2021), MuleSoft (2018)
Current line	Sales Cloud (seasonal)
End-of-support	Evergreen
Install base	CRM market leader

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Accounts	9k	Yes
Contacts	31k	Yes
Opportunities	6k	Yes
Activities	1.1M	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

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Custom migration — API

Move accounts, contacts and pipeline via Salesforce Bulk and REST APIs. **Applies here:** strong — mature, well-documented APIs.

↑

Vendor-native export

Use Salesforce's Data Export Service and reports for bulk extraction. **Applies here:** available — scheduled native export.

📄

Snapshot — STG SUNSET POINT

Capture records as screenshots and reports in a governed archive. **Applies here:** lower — evergreen CRM, usually migrated live or retained. [Learn more about STG](#)

SOURCES

- Salesforce release and API documentation
- Salesforce acquisition history (Tableau, Slack, MuleSoft)

PROFILE 10 OF 12

Quality management

ETQ Reliance · Components division

CLOUD SAAS

REGULATED (21 CFR PART 11)

AUTO-RENEWING CONTRACT

DEPLOYMENT Cloud SaaS	CRITICALITY Tier 1	USERS 130	ANNUAL \$140k	RENEWAL Auto-renews Feb 2026	OWNER Quality
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Overview. A cloud QMS handling document control, CAPA, nonconformance, audits and complaints for Vantage. A quality system of record alongside the laboratory and controlled-document systems.

Lifecycle & support. Actively supported cloud QMS with a configurable application model and regular releases.

Architecture. Vendor-hosted cloud; configurable application (SE) model; REST APIs; SSO.

Integrations. SSO; links to the laboratory and ERP for complaint and nonconformance context.

Retention. Quality records carry multi-year regulatory retention with audit-trail integrity. Factual planning item: the subscription auto-renews in February 2026.

Compliance. 21 CFR Part 11; ISO 13485.

VENDOR & PRODUCT FACTS

Vendor	ETQ, part of Hexagon
Ownership	Hexagon AB (acquired ETQ 2022)
Current line	ETQ Reliance (cloud)
End-of-support	Evergreen
Contract	Auto-renews Feb 2026
Install base	Mid-market QMS

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Controlled documents	19k	Yes
CAPAs	3.1k	Yes
Complaints	12k	Yes
Audit records	4.5k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

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Custom migration — API
Move quality records via ETQ's REST APIs. **Applies here:** strong — configurable REST API surface.

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Vendor-native export
Use ETQ's export and reporting for controlled records. **Applies here:** available — native export.

📄

Snapshot — STG

SUNSET POINT

Capture quality records as screenshots and reports in a governed, audit-ready archive — ready to seed a successor QMS or stand as the retained record. **Applies here:** strong — regulated records; mind the Feb 2026 auto-renewal when timing any change. [Learn more about STG](#)

SOURCES

- ETQ Reliance product documentation
- Hexagon acquisition of ETQ (2022)
- Subscription contract terms (customer-supplied)

Enterprise content management

OpenText Documentum · Components division

LEGACY ON-PREM LONG-RETENTION DATA REGULATED (21 CFR PART 11)

DEPLOYMENT	CRITICALITY	USERS	ANNUAL	RENEWAL	OWNER
On-prem	Tier 2	110	\$85k	Jun 2027	QA / Records

Overview. An enterprise content management platform holding controlled documents and declared records — SOPs and quality documentation held outside the QMS. The content repository of record for these documents.

Lifecycle & support. A mature platform under OpenText stewardship. The on-prem Documentum generation is aging and increasingly costly to maintain; OpenText's direction favors newer ECM lines. Supported but legacy-generation.

Architecture. On-prem Documentum Content Server with an Oracle/SQL metadata store and a separate file/BLOB content store; DFC and DQL access; thick and web clients.

Integrations. Exchanges controlled documents with the QMS; LDAP / SSO for identity.

Retention. Declared records and controlled documentation carry long statutory retention. Content, metadata and version history must be preserved together to remain meaningful.

Compliance. 21 CFR Part 11 for controlled documents; records-retention schedules.

VENDOR & PRODUCT FACTS

Vendor OpenText

Ownership path
Documentum → EMC (2003) → Dell (2016) → OpenText (2017)

Recent vendor M&A
OpenText acquired Micro Focus (2023)

Current line
OpenText Content Cloud / Extended ECM

This product Legacy generation

End-of-support
No fixed public EOL; steered to newer ECM

Install base Large, mature

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Controlled documents	280k	Yes
Renditions / versions	1.4M	No
Declared records	95k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

🔄 **Re-platform — vendor upgrade**
Move to OpenText's current ECM line (Content Cloud / Extended ECM), staying with the vendor. **Applies here:** available — OpenText offers a forward path.

⏪ **Custom migration — API**
Move documents and metadata into the replacement ECM or QMS via DFC / REST. **Applies here:** moderate — content and metadata must move together.

📄 **Snapshot — STG** SUNSET POINT
Capture every record as screenshots and reports in a governed, queryable archive — ready to seed the successor system as its initial data load, or stand as the retained record once the application is retired. **Applies here:** strong — canonicalizes a proprietary repository a replacement system can't read directly. [Learn more about STG](#) ↗

SOURCES

- OpenText Documentum product lifecycle and content-management documentation
- Documentum (Content Server / DFC) architecture references
- Vendor ownership history: EMC, Dell, OpenText; OpenText–Micro Focus (2023)
- Records-retention and 21 CFR Part 11 guidance for controlled documents

PROFILE 12 OF 12

Payroll & HR

ADP Workforce Now · Corporate

CLOUD SAAS

DEPLOYMENT Cloud SaaS	CRITICALITY Tier 1	USERS 320	ANNUAL \$140k	RENEWAL Jul 2026	OWNER People
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Overview. A cloud HR and payroll platform covering payroll, benefits and core HR for Vantage. The HR and payroll system of record.

Lifecycle & support. Actively supported cloud HCM with vendor-managed updates.

Architecture. ADP-hosted cloud; APIs via the ADP Marketplace; browser and mobile clients.

Integrations. General-ledger posting to the ERP; benefits carriers; time-and-attendance.

Retention. Payroll and tax records carry statutory retention; export and reporting are available via ADP.

Compliance. Payroll tax and records retention; SOC 1 / SOC 2 (vendor).

VENDOR & PRODUCT FACTS

Vendor	ADP (NASDAQ: ADP)
Ownership	Public
Current line	Workforce Now (cloud)
End-of-support	Evergreen
Install base	Very large payroll / HCM

KEY DATA OBJECTS

OBJECT TYPE	RECORDS	SYSTEM OF RECORD
Employee records	320	Yes
Payroll history	7 yrs	Yes
Benefit enrollments	1.8k	Yes

TRANSITION OPTIONS

Standard approaches that apply to this system. Options, not a recommendation — which fits is the team's call.

<>

Custom migration — API
Move employee and payroll data via ADP Marketplace APIs. **Applies here:** moderate — APIs available via the marketplace.

↑

Vendor-native export
Use ADP's reporting and export for payroll and tax history. **Applies here:** available — native reporting / export.

📄

Snapshot — STG SUNSET POINT
Capture payroll and tax history as screenshots and reports in a governed archive — the retained record after the app is retired. **Applies here:** strong — payroll and tax records carry statutory retention. [Learn more about STG](#)

SOURCES

- ADP Workforce Now product documentation

About STG

STG (System Transition Governance) is Sunset Point's platform for retiring a system while keeping its records. It captures each system's data as screenshots and reports in a governed, queryable archive. Those captured records can seed the successor system's initial data load where data carries forward, or stand as the retained, audit-ready record where a system is simply shut down.

WHY IT MATTERS

Rationalizing an estate means retiring or replacing systems over time. STG preserves their records for compliance and reference without keeping legacy software running, and gives the team a clean, canonical starting point for the systems that carry forward.

HOW IT APPEARS IN THIS RECORD

Each profile lists "Snapshot — STG" among its transition options, alongside vendor-upgrade, custom-migration and export paths. STG is one option among several; which path fits any given system is the organization's decision. Where a profile links "Learn more about STG," it points to Sunset Point's documentation.

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