

Upgrade to Windchill PDMLink 11.0

1 OVERVIEW

Getting your Windchill PDMLink to the most current version represents an opportunity to significantly improve your product development capabilities. This document outlines the scope of work to be executed during an upgrade from an existing version of Windchill to Windchill PDMLink 11. The process is fairly straightforward, and in most cases can be accomplished from a remote location, keeping your costs and business interruptions to a minimum. In short, we'll address the following topics:

	Step	Requirements
	Information Gathering:	Identify the specifics of your current system, user profiles, configurations, etc.
	Upgrade Pre-Planning:	Assess characteristics of your current environment: <ul style="list-style-type: none"> ✓ Hardware ✓ Software ✓ Disk Space, etc. We'll also recommend adjustments to improve new system performance.
	Test Upgrade:	Test the upgrade in a cloned environment and run the upgrade process across all configurations, modules, and processes to make sure that there are no problems during production.
	Production Upgrade:	Set up the production environment and execute the production software upgrade. We'll want to make sure that the potential business disruption is minimal.
	Post-Upgrade Support:	Standby System Administration support to ensure the program is running smoothly.

2 INFORMATION WE'LL NEED FROM YOU:

Eccellent Solutions will need certain information from you in order to properly scope the project. Below is a short list of data points you'll want to have available when you make plans to upgrade:

- i. **Current System:** Windchill PDMLink (e.g. 10.2 M030).
- ii. **Target System:** Windchill PDMLink 11 M020.
- iii. **Windchill Users:** Differentiate between your "Heavy Users", "Light Users", and "View-Only" users. If you think of "Light" and "View-Only" as the same thing, that works just fine.
- iv. **Windchill Modules:** Be prepared to list out the Windchill Modules you have installed with your current system. We'll want to mirror the functionality in the new environment. For example:
 - PTC Windchill ProjectLink
 - PDMLink
 - Service Pack
 - Help Center
 - Info*Engine
 - Common Base
 - Services
 - Creo View – Clients
 - Creo View – Adapters
- v. **Windchill Customizations:** This list includes both heavy configurations as well as customizations at the code level. It's important to distinguish between the two. Windchill is a very highly configurable application. An expert could use out-of-the-box functionality to capture just about any needs you may have when it comes to workflow development and process support. In rare cases you may have to go to the Java code level in the application in order to integrate with downstream systems, or to support a more convoluted and highly distributed release approvals path.
- vi. **Database:** E.g. Oracle, SQL, SAP, etc. There are different requirements for each database type, so understanding this will be important.
- vii. **Server Environment:** Just a brief description of your server environment. If you have a single server, just let us know it's *monolithic*. If you have a more distributed server architecture, let us know that as well.
- viii. **Operating System:** Windows 10, for example.
- ix. **CAD System:** Creo2, for example.
- x. **ERP System:** JDEdwards, Oracle 10g, SAP, etc.
- xi. **Other Information:** There might be other information we need, like if you have Publishing Servers, multiple CAD systems, and so on. We'll work with you on that.

3 THE UPGRADE PROCESS

Here's the general process against which we'll execute *after* we've given you a price and you've accepted.

3.1 UPGRADE PRE-PLANNING:

First we'll look at your environment more closely and evaluate the details of your Windchill application and process technology support stack as follows:

- a. Assess key characteristics of the Client Windchill environment – Hardware, Software, Disk Space, key system dependencies, etc.
- b. Recommend supporting system upgrades or enhancements as necessary to support productivity improvements with the new software version.
- c. Design a Windchill production clone environment to act as the WC11 Installation and Test bed for the software upgrade.
- d. Document any system changes or fixed variables required for the target production environment.
- e. Establish expected performance benchmarks and load processing capabilities for the upgraded software.
- f. Develop and validate an Upgrade project plan, procedures, and checklist compatible with your needs.
- g. Set up a Test System for use as a Test Source system and also as a Test Target System in support of the upgrade process.

3.2 TEST UPGRADE

Next we'll test the upgrade in a cloned environment, mirroring your actual operating environment and running the upgrade process across all of your configurations, modules, and processes to make sure that there are no problems during production. And of course we'll rely on you to help us assess goodness of fit between the clone environment and your production system. Here's what we'll do:

- a. Construct and validate the clone system according to the findings and agreements set forth in the pre-planning phase.
- b. Install, configure, and validate the new software version and/or modules.
- c. Configure the test-target system to process test-source data.
- d. Run the Upgrade Manager and Windu utilities using the Test System and database to evaluate configuration goodness of fit.
- e. Validate Pre-upgrade Processes on Test Source and Target Systems.
- f. Adjust Test system as necessary.
- g. Re-run any required tests to confirm readiness for the Production system upgrade.

3.3 PRODUCTION UPGRADE

Once we've tested the upgrade in the cloned environment, and are comfortable that we've managed all of the potential problems, we'll set up the production environment and work with you to plan the exact time and date of the production software upgrade. We'll want to make sure that the potential business disruption is minimal. The process works like this:

- a. Prepare and configure the Production System and environment.
- b. Perform the upgrade according to the plans developed and tested.
- c. Run the Upgrade Manager Using the Production System.
- d. Validate and Tune the upgraded software.

3.4 POST-PRODUCTION SUPPORT

After we've upgraded the system we'll stand by in System Administration mode for a few days to make sure that everything is running fine.

- a. To ensure production software functionality and performance, we'll provide system and environment trouble-ticket and helpdesk support as necessary for a period of five days beyond the actual go-live date for the upgraded software in the production environment.
- b. Trouble-Ticket and helpdesk support required beyond the initial five-day period will be charged on a per-ticket basis at an hourly rate, or we can work out a contract that covers a specific period of time for you.

3.5 CLIENT RESPONSIBILITIES

In support of the upgrade activities outlined above, we'll look to you for the following resources:

- a. Appropriate access to servers, databases, and other support environment variables necessary for the proper performance of the upgrade activities.
- b. A qualified representative from your organization to be available (phone, email) during the entire upgrade process.
- c. Backup requirements for the production environment as necessary.

4 REMOTE ACCESS IS KEY!

With today's technology and security, we're expecting that all upgrade work specified under this program can be completed from offsite facilities, provided remote access performance is acceptable to you throughout the process, of course. Doing all of this from remote is a key requirement for success and cost management, so we'll need your help with the following:

- a. Provide Eccellent Solutions with remote access into the existing Production server(s) running Windchill PDMLink <Source Version and Build> and any additional servers or computing environments required to complete the tasks outlined in this document.
- b. In the event that local site access is required, we'll come onsite. And we'll need you to make sure we get such access as necessary for Eccellent Solutions personnel to complete the tasks we've outlined.

5 COMPLETION CRITERIA AND TIMING (ESTIMATES)

In our experience the job is done upon completion of the deliverables described above. You may have specific requirements. Let's discuss those.

As for timing, depending on your system we think it'll take about 20 days (about 4 weeks). But that all depends on preparation, configuration, and execution.

In general, the timeline for an "average" upgrade looks like the table below. You might need more, or less time depending on your current software version, system configuration, and infrastructure requirements.

Estimated Software Upgrade and Support Schedule

Milestone	Estimated number of Days
Upgrade Pre-Planning	3 Days
Test Upgrade	10 Days
Production Upgrade	2 Days
Post-Production Support	5 Days

(Table A)

Durations may vary depending on the complexity of your Windchill System.