

# **Keys to Success in Planning your Pro/INTRALINK 8.0 Migration and Deployment**

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Marc Berget  
PTC

# Agenda

**“Keys to Success...” What is “Success”?**

**The Complete Pro/INTRALINK 8.0 Deployment Process**

**Migration Roadmap: the Path to a Successful Migration from 3.x**

**“Patterns” of Migration**

**Sizing Up Your Project: What Matters Most?**

**Migration Implementation Options**

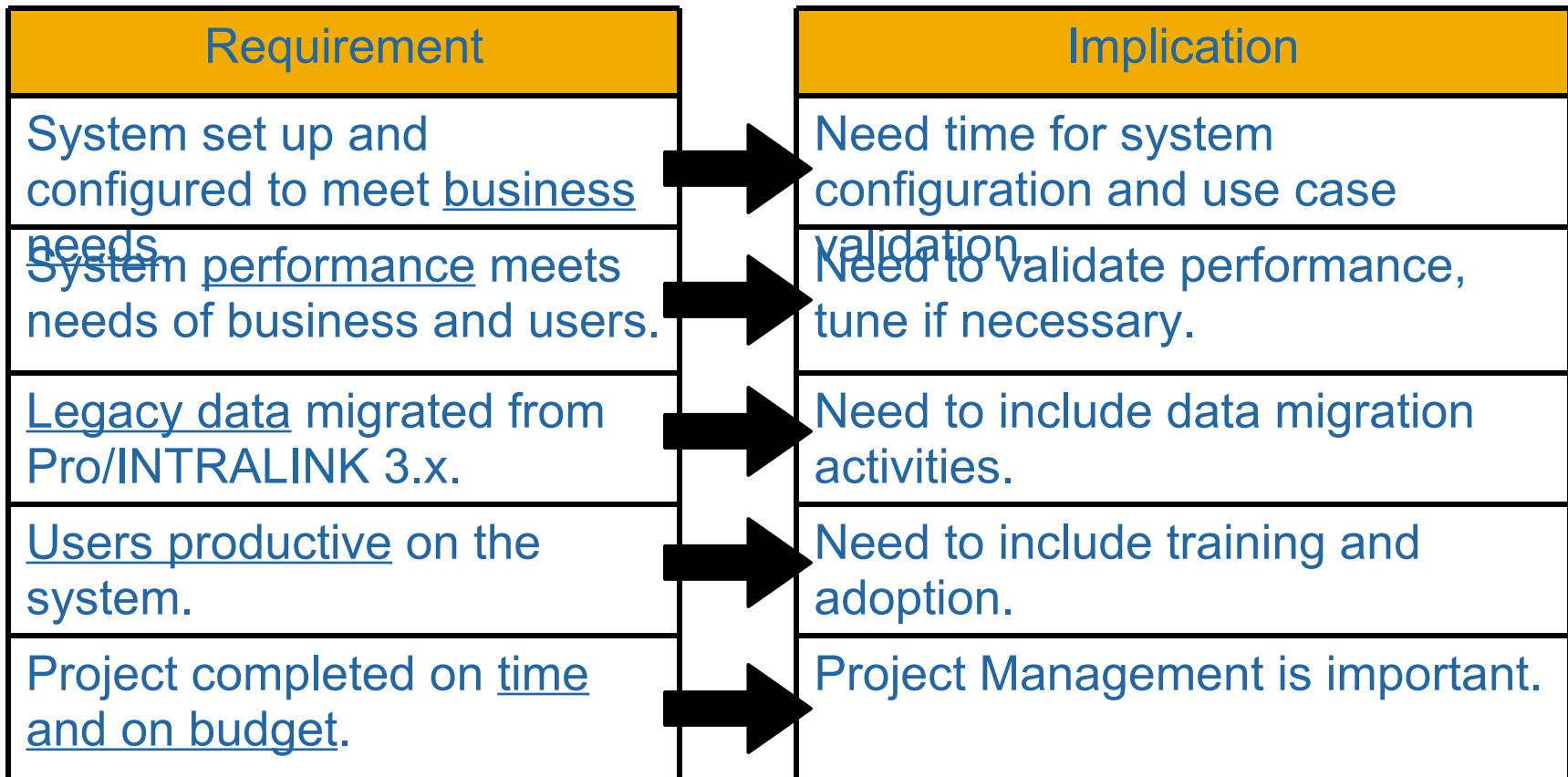
**Top 3 “Don’t Forgets”**

**Resources to Assist You**

**Q&A**

# “Keys to Success...” What is “Success”?

**A successful Pro/INTRALINK 8.0 deployment meets certain requirements. Those requirements *mean something* in the deployment plan.**



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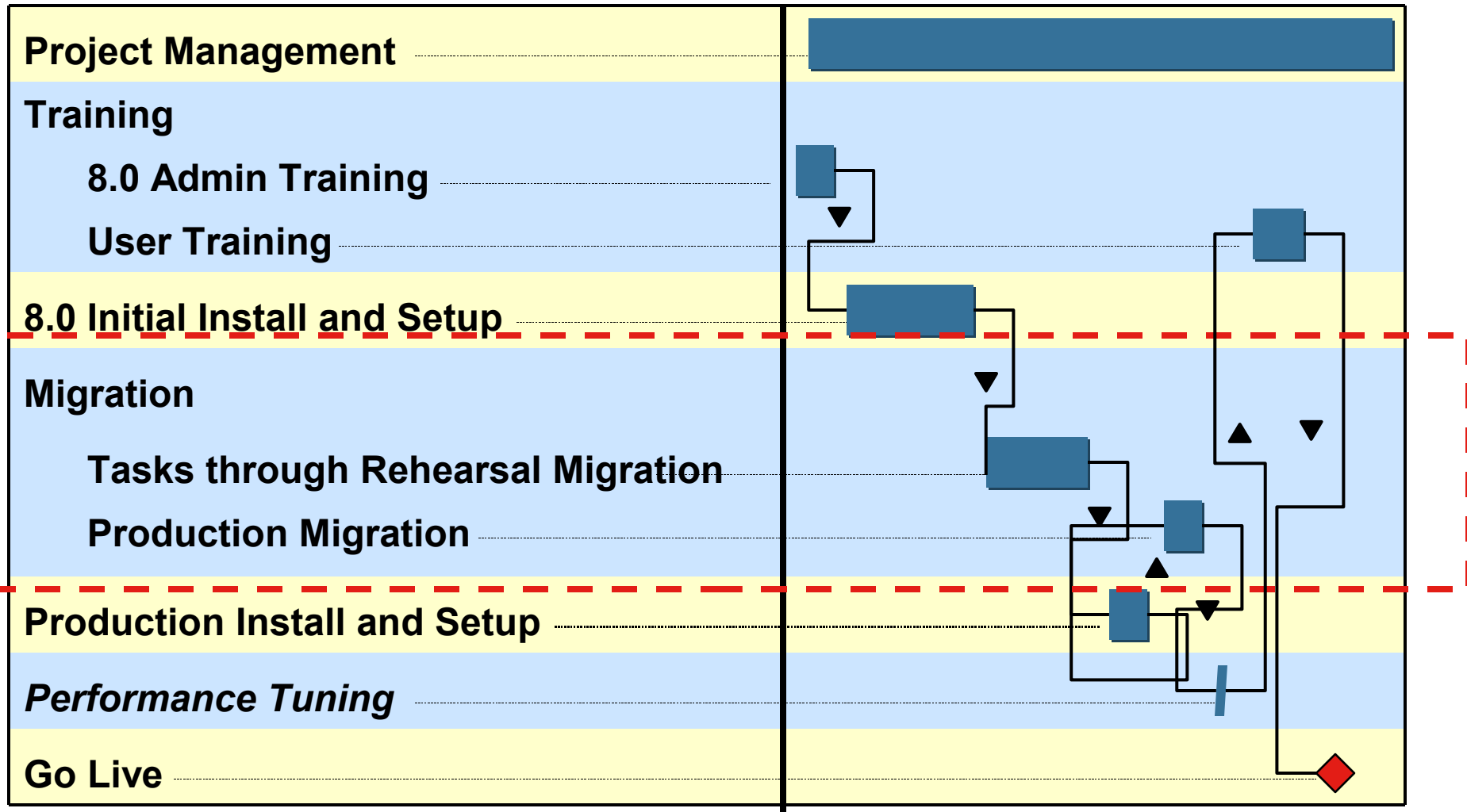
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# The Typical Pro/INTRALINK 8.0 Deployment Process



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# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

**Customer Training & Prerequisites**

**P** Planning

**CI** Conflict Identification (Metadata Migration)

**CR** Conflict Resolution and Data Cleansing

**RM** Rehearsal Migration

**PM** Production Migration

This methodology is based on PTC's years of experience in all types and sizes of migrations.

In particular...

- ⦿ Pro/PDM to Pro/INTRALINK 3.x
- ⦿ Pro/INTRALINK 3.x to PDMLink 7.0

PTC Global Services and Certified Migration Partners will follow this methodology.

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

## Customer Training & Prerequisites

- P Planning
- CI Conflict Identification (Metadata Migration)
- CR Conflict Resolution and Data Cleansing
- RM Rehearsal Migration
- PM Production Migration

## Details:

- ⦿ Attend administrator training.
- ⦿ Attend migration training (if customer-led migration).
- ⦿ Provision hardware.
- ⦿ Complete Install and Setup.

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

Customer Training & Prerequisites

**P** **Planning**

**CI** Conflict Identification (Metadata Migration)

**CR** Conflict Resolution and Data Cleansing

**RM** Rehearsal Migration

**PM** Production Migration

## Details:

- ⦿ **Create Project Plan**
- ⦿ **Determine Data Mappings and document them in a Migration Specification.**
  - Example: attribute mappings.
  - Example: folder mappings.
- ⦿ **Create Validation Plan.**

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

Customer Training & Prerequisites

**P** Planning

**CI** **Conflict Identification (Metadata Migration)**

**CR** Conflict Resolution and Data Cleansing

**RM** Rehearsal Migration

**PM** Production Migration

## Details:

- ⦿ **Install Pro/INTRALINK Data Migrator.**
- ⦿ **Run Pro/INTRALINK Data Migrator on Metadata Only, using Data Mappings from Migration Specification.**
- ⦿ **Pro/INTRALINK Data Migrator will identify conflicts and generate Conflict Report Logs.**

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

Customer Training & Prerequisites

**P** Planning

**CI** Conflict Identification (Metadata Migration)

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## Details:

- ⦿ **Review Conflict Report Logs.**
- ⦿ **Determine and apply appropriate resolutions.**
- ⦿ **Update Migration Specification, Validation Plan, and Project Plan, if necessary.**

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

Customer Training & Prerequisites

**P** Planning

**CI** Conflict Identification (Metadata Migration)

**CR** Conflict Resolution and Data Cleansing

**RM** Rehearsal Migration

**PM** Production Migration

## Details:

- ⦿ **Execute full migration (metadata and content).**
- ⦿ **Validate results using Validation Plan.**
- ⦿ **Review validation results. Update Migration Specification, Validation Plan, and Project Plan, if necessary.**
- ⦿ **Perform additional Conflict Resolution or Data Cleansing, as necessary.**

# Migration Roadmap: the Path to a Successful Migration from Pro/INTRALINK 3.x

Customer Training & Prerequisites

**P** Planning

**CI** Conflict Identification (Metadata Migration)

**CR** Conflict Resolution and Data Cleansing

**RM** Rehearsal Migration

**PM** Production Migration

## Details:

- ⦿ **Execute Production Migration.**
- ⦿ **Validate results using Validation Plan.**
- ⦿ **Review validation results.**
- ⦿ **Make Go-Live decision.**

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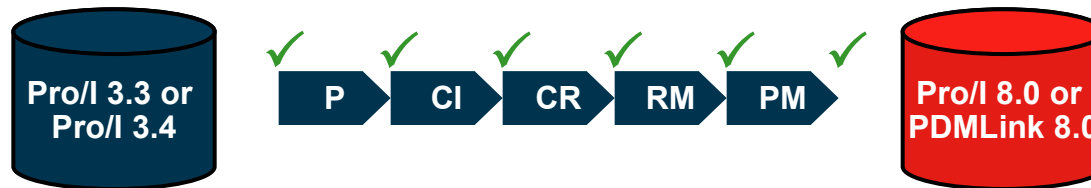
**Q&A**

# “Patterns” of Migration

## There are three basic “patterns” of migration

### ⊙ Single-Source

- Migration from a single Pro/INTRALINK 3.x system to a single Pro/INTRALINK 8.0 system.
- Can be considered to be the “basic” or the “unit” case.



### ⊙ Multi-Source: Serial

- Series of single-source migrations with multiple go-live events.

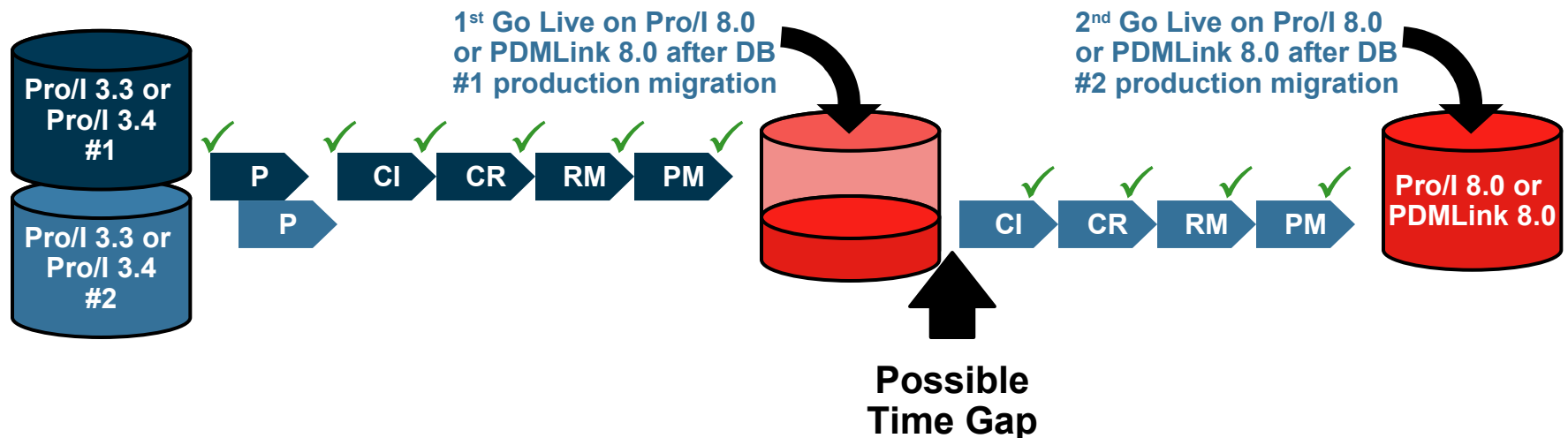
### ⊙ Multi-Source: Stepped

- Repeated migration subtasks with single go-live event.

# Multi-Source Migration: Serial Migration Pattern

## Serial Migration Pattern

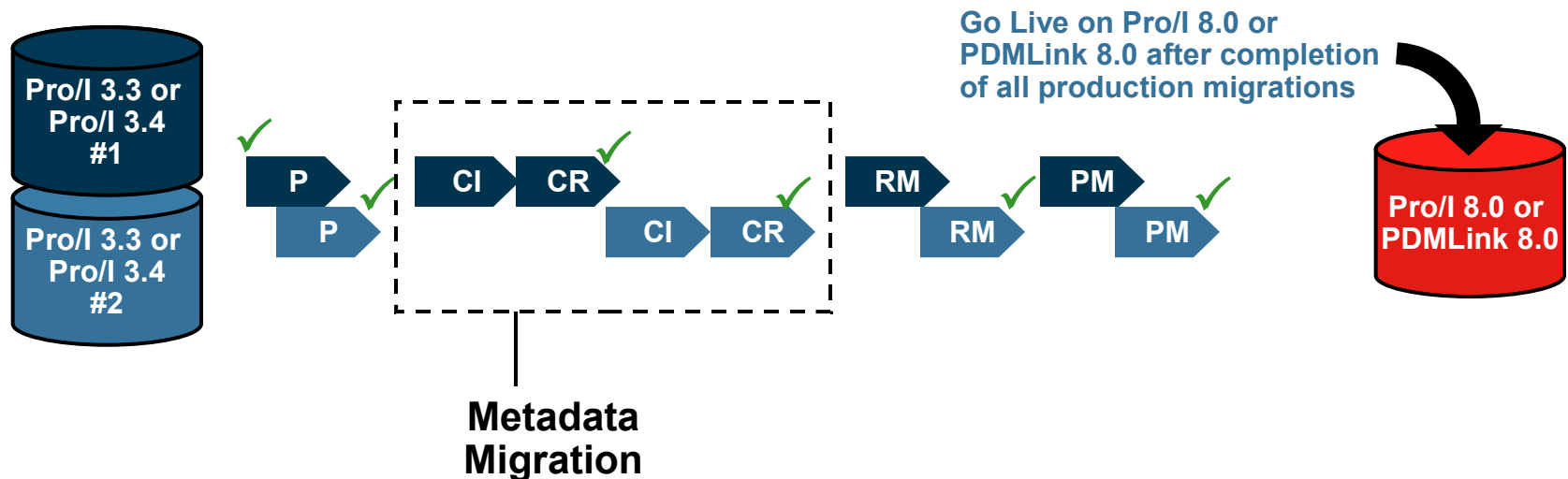
- Series of single-source migrations with multiple go-live events.
- Good way to combine 3.x databases over time and “grow” the system.



# Multi-Source Migration: Stepped Migration Pattern

## Stepped Migration Pattern

- ⦿ Repeated migration subtasks with single go-live event.
- ⦿ Good way to focus on migration over a limited period and get it out of the way.



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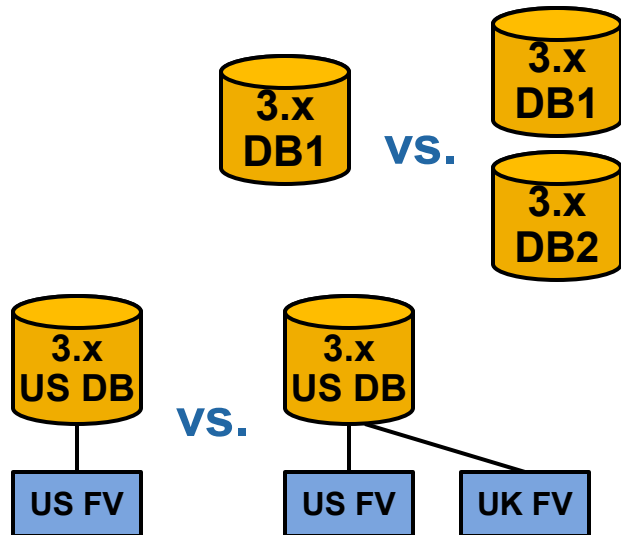
# Sizing Up Your Project: What Matters Most?

## What are the leading drivers in overall project complexity?

- ⊙ **Current CAD data management processes.**
  - Impact configuration of Pro/INTRALINK 8.0.
- ⊙ **Quantity and distribution of users.**
  - Impact training efforts and support needs.
  - Impact Pro/INTRALINK 8.0 configuration and architecture.
- ⊙ **Quantity, distribution, and complexity of data.**
  - Impact migration activities.

# Sizing Up Your Project: What Matters Most in Migration?

## Factors related to 3.x data quantity and distribution



- ◉ **Number and locations of source Pro/INTRALINK 3.x databases and file vaults.**

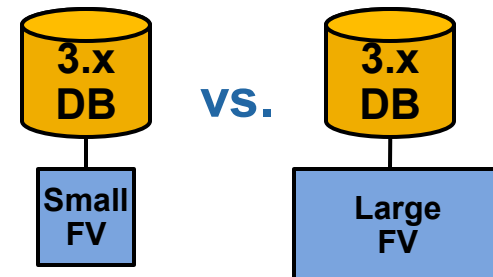
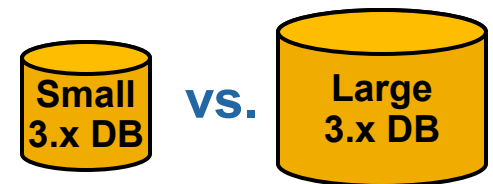
- Two databases more difficult than one.
- Distributed file vaults more difficult than centralized.

- ◉ **Number of Product Item Versions (PIVs) to be migrated.**

- Affects duration of migration processing.

- ◉ **Volume of file vaults (GB).**

- 100GB more “cumbersome” than 50GB.



# Sizing Up Your Project: What Matters Most in Migration?

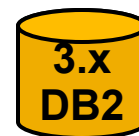
## Factors related to 3.x system configuration

### ⊙ Inconsistencies among Pro/INTRALINK 3.x databases

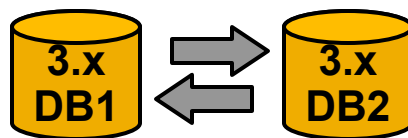
- Impacts system design and conflict resolution. Example: Revision sequence.



1, 2, 3, ..., -, A, B, C, ...



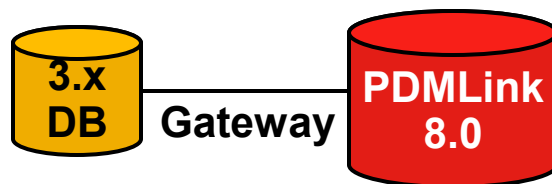
-, A, B, C, ...



Package Replication

### ⊙ Usage of package replication in 3.x.

- Affects complexity of creating test environments.



### ⊙ Usage of Pro/INTRALINK Gateway in 3.x

- Affects complexity of creating test environments. (PDMLink 8.0 only.)

# Sizing Up Your Project: What Matters Most in Migration?

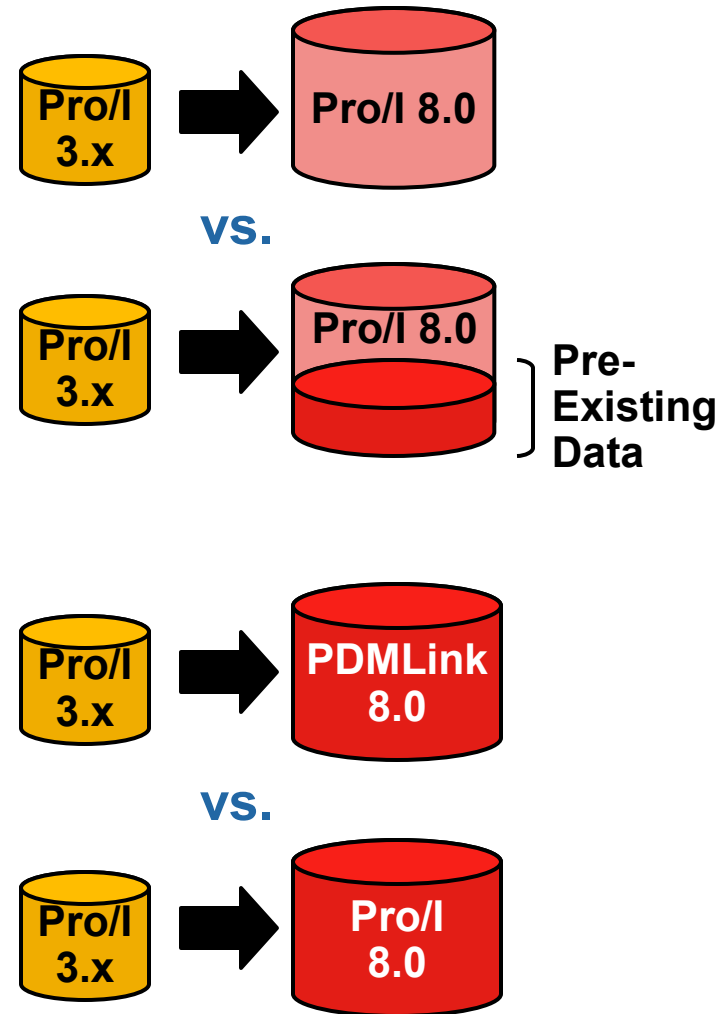
## Factors related to target system

### ⦿ State of the Pro/INTRALINK 8.0 system.

- Populated database causes more conflicts than empty database.

### ⦿ Migration to PDMLink 8.0 vs Pro/INTRALINK 8.0.

- PDMLink 8.0 has concept of WTParts and product structure (WTPart relationships).
- WTParts and structure can be created during migration. Adds time.



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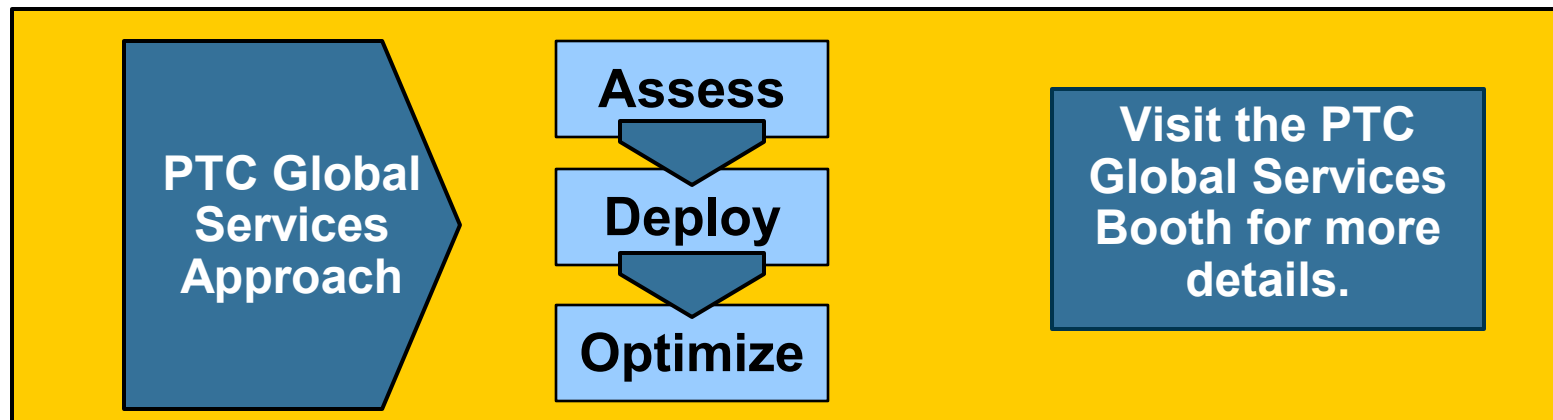
**Customers have two options for migration implementation:**

⦿ **Customer-Led Migration**

- Pro/INTRALINK Data Migrator 8.0 Training
- Migration Advisor Package

⦿ **Services-Led Migration**

- Migration services provided by PTC Global Services or by a Certified Migration Partner.



# Customer-Led Migrations: What's Available?

## Instructor-Led Migration Training

- ⊙ **Windchill 8.0 Administrator training.**
- ⊙ **Pro/INTRALINK Data Migrator 8.0 tool and migration process.**

## Migration Advisor Package

- ⊙ **Migration Project Planning Template**
- ⊙ **Migration Specification Template**
- ⊙ **Validation Test Plan Template**
- ⊙ **Migration Best Practices Handbook**
- ⊙ **Advisor Sessions: Consultative project review with an experienced Migration Consultant.**

**PTC Customer Support for assistance with the Pro/INTRALINK Data Migrator 8.0 Software**

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# Top 3 “Don’t Forgets” in Your Migration Project

## 1. Have a Plan

- ⊙ **Project Plan**
- ⊙ **Validation Plan**
- ⊙ **Mapping Plan (Migration Specification)**

## 2. Document Everything

- ⊙ **Process Steps**
- ⊙ **Conflict Resolutions**

## 3. Rehearse! (Validate Migration Process, Not Migration Software)

- ⊙ **CAD Data Management use cases (before migration).**
- ⊙ **Data completeness and correctness (after rehearsal and production migrations).**

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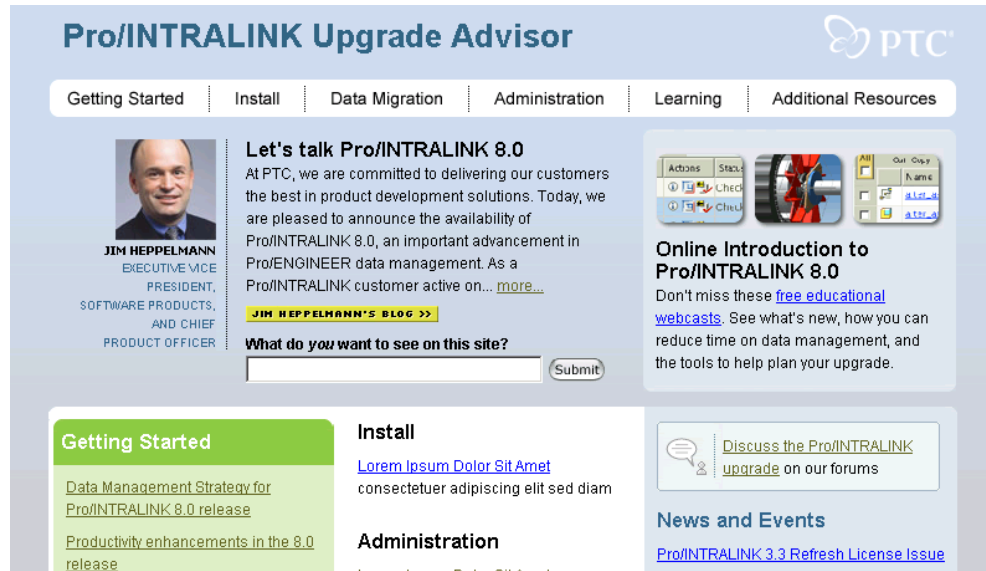
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# www.PTC.com/go/ProINTRALINK



**Pro/INTRALINK Upgrade Advisor**

Getting Started | Install | Data Migration | Administration | Learning | Additional Resources

**Let's talk Pro/INTRALINK 8.0**  
 At PTC, we are committed to delivering our customers the best in product development solutions. Today, we are pleased to announce the availability of Pro/INTRALINK 8.0, an important advancement in Pro/ENGINEER data management. As a Pro/INTRALINK customer active on... [more...](#)  
[JIM HEPPERMANN'S BLOG >>](#)

**What do you want to see on this site?**

**Getting Started**  
[Data Management Strategy for Pro/INTRALINK 8.0 release](#)  
[Productivity enhancements in the 8.0 release](#)

**Install**  
[Lorem Ipsum Dolor Sit Amet](#)  
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**Administration**  
 Lorem Ipsum Dolor Sit Amet

**Online Introduction to Pro/INTRALINK 8.0**  
 Don't miss these [free educational webcasts](#). See what's new, how you can reduce time on data management, and the tools to help plan your upgrade.

[Discuss the Pro/INTRALINK upgrade](#) on our forums

**News and Events**  
[Pro/INTRALINK 3.3 Refresh License Issue](#)

## Community web site for current Pro/INTRALINK customers

- ⊙ Your central on-line resource to help you plan and make the move
- ⊙ Experts who can provide advice about making the move to the new release
- ⊙ Discussion forums to communicate with experts and other users

## Find tips and resources to help you in:

- ⊙ Getting started
- ⊙ Installing
- ⊙ Migrating data
- ⊙ Administering the system
- ⊙ Learning
- ⊙ Finding additional resources

Order or Download  
 "Quick Reference"  
 Cards



# Migration Questionnaire and 3.x Summary Tool

## Migration Questionnaire

- ⦿ **Helps you summarize your Pro/INTRALINK 3.x implementation and project objectives.**
  - Data servers, file servers, Pro/E versions.
  - Usage questions. (Duplicate? Branching? Package replication?)

## Pro/INTRALINK 3.x Data Summary Tool

- ⦿ **Summarizes the contents and complexity of each Pro/INTRALINK 3.x data server.**
- ⦿ **Quantity of PIVs, quantity of file data.**
- ⦿ **Attributes, release levels, revision sequence, and many other parameters.**

**See the Pro/INTRALINK Community Site or contact your PTC or Reseller Services Business Developer.**

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# Q&A

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Questions?

The logo features the text "PTC" in a bold, white, sans-serif font, followed by the word "user" in a white, italicized serif font. The "user" is partially overlaid by a red, tilted square.

**PTC** *user*

**WORLD  
EVENT  
2005**

**PTC** *user*