



Pro/INTRALINK Migration Considerations

At Sequoia, we pride ourselves on helping customers achieve the success they are entitled to through the purchase of PTC's suite of product development system products.

As you look forward to your migration from the client server version of Pro/Intralink to the server based internet architecture of PDMLink or Pro/INTRALINK, proper planning will go a long way in ensuring a successful migration. While the following information has been assembled to help companies properly prepare for their migrations, rest assured that Sequoia Etc will work with you every step of the way. We won't be satisfied until you are satisfied.

From the project planning standpoint the following are high level categories that discrete activities can be associated with:

- Business and System Administration
- Test Migration
- Adoption Planning
- Training – User/Business Administration/System Administration
- Production Migration

Primary Pro/Engineer Basic Software Considerations

Intralink 8.0 (M040) or PDMLink 8.0 (M040) compatible with Wildfire 2.0 (M250+) and Wildfire 3.0 (M070+)

or

Intralink 9.0 (F000) or PDMLink 9.0 (F000) compatible with Wildfire 3.0 (M110+)

Business Administration:

- Are you migrating to Pro/INTRALINK 8.0 or Windchill PDMLink 8.0?
- Are you migrating to Pro/INTRALINK 9.0 or Windchill PDMLink 9.0?
- Folder Mapping - Folder Structure Reorganization (Products/Libraries)
- Release Scheme/Release Level Mapping - Consolidation/Restructuring
- Attribute Mapping - Deleting Unwanted/Unused Attributes (PRO/E Designated Attributes)
- Revision/Version Sequence - Mapping to Version/Iteration in 8.0/9.0
- Removing Unwanted/Unneeded Data (Objects, Folders, Release Levels, Attributes, etc...) prior to migration
- Will there be a conference room pilot or will there be a straight production conversion/implementation? (note conference room pilot highly recommended)

There are few things that **will be** migrated or mapped and some may have to be recreated or obsoleted:



The following **Will** migrate/be mapped:

- Folder structure, usernames, release levels and revisions
- Versioned data (PTC and non-PTC data types), revision and version history, named baselines, “as-stored” configuration, folder structure, users, attributes and their values and RTP/check-in forms

The following **Will NOT** automatically migrate:

- Roles, folder authorizations, release procedures, preferences, table displays, locate searches, and replication settings

System Administration:

Existing Data (before migration):

- How many Pro/INTRALINK 3.x databases will be migrated?
- Where are these databases located: on the same LAN as the eventual Pro/INTRALINK 9.0 or Windchill PDMLink 9.0 system?
- Where are the associated Pro/INTRALINK 3.x file vaults located?
- Do any inconsistencies exist among the Pro/INTRALINK 3.x databases (e.g., release schemes, revision sequences, attributes, release processes, folder structures)?
- Does data duplication exist among the databases?

Hardware Considerations:

All new versions of Pro/INTRALINK and/or PDMLink are server based versions. Client software is no longer required on individual machines. In most cases this means transition from a local CAD administration role to an enterprise IT role. While individual sizing requirements will vary based on number of users and size of data [these guidelines](#) will help with determining what is right for you. Other considerations include:

- Tape or hard drive backup schedule and procedures
- Disaster recovery procedures
- Hardware location and power loss protection
- Internal LAN infrastructure (minimum 100 Mb/s or 1Gb/s capable)
- External WAN infrastructure (minimum T-1 line capable)
- Visualization server setup and strategy

Pro/Engineer Modeling Considerations

The Pro/INTRALINK migration process involves multiple test passes from 3.x to the newer web based architecture prior to the actual production conversion. Most common problems are related to object names e.g. the same name for different physical parts in two or more Pro/INTRALINK 3.x databases. These conflicts will need to be corrected prior to the completion of a successful migration. There are occasionally other problems unique to each company and their Model Design techniques. These problems include but are not limited to:



- Branching
- Family Tabled objects.

Data cleansing information in Intralink 3.x before the migration is highly recommended but not required. Sequoia Etc can help with outlining the best course of action in conjunction with the customer.

Training

- Business Administrator Training – needs to be completed prior to actual production conversion
- System Administrator Training – needs to be completed prior to test migration and server installation at customer site
- User Training – needs to be completed prior to conference room pilot and/or production migration. Timeliness of this training as related to going live is key to success.

Adoption Planning

- Obtaining management buy-in
- Obtaining user buy-in
- Continuously measuring success
- Creating momentum and excitement
- Keeping the focus on value
- Handling inevitable scope changes – establishing the change control board
- Resource commitments
- Project Management

Sequoia Etc stands ready to help your company with the migration. We can help reduce risk, and cost as related to the migration so that you can concentrate on what you do best, developing and producing your products.

Call or email today for a complimentary planning evaluation of your specific conversion requirements.