



WINDCHILL SERVICE OFFERINGS

Standard Service Offerings for Windchill



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Windchill Services - General

Sequoia Etcetera, LLC offers a variety of service packages designed to help reduce overall time to value as a result of customer's desire to embark on technology enabled product development process improvements. This document outlines those offerings which at a high level include the following:

1. Software Installation and initial tuning
2. Product Implementation and adoption
3. Product Customization and optimization
4. Periodic Windchill performance audits/health checks

Independent of, and in addition to Sequoia Etc's standard implementation packages, we are pleased to offer cost effective Pro/INTRALINK Migration services designed to transition companies from the older client server based Pro/INTRALINK 3.x to Pro/INTRALINK 9.0+ or Windchill PDMLink 9.0+. Migration services are intended to cover the following activities.

1. Current Pro/INTRALINK data test conversion(s) and identification of required data cleansing actions. (off premise)
2. Guidance on data cleansing best practices
3. Pro/INTRALINK Production data migration to an instance of either Pro/INTRALINK or PDMLink (on premise)

Note: Customers migrating from Pro/INTRALINK 3.x to Pro/INTRALINK 9.0 or Windchill PDMLink 9.0 will need the following services in order to ensure a complete and successful migration

- Pro/INTRALINK Test Migration
- Pro/INTRALINK Production Migration
- Pro/INTRALINK or Windchill PDMLink Production Implementation



Pre-Implementation Meeting

Included in all Sequoia facilitated Windchill implementations is a pre-implementation kick off meeting. This meeting is to ensure all roles, responsibilities and timetables are understood by the extended project team and is a valuable part of any implementation.

Price

No Charge

Time

2-4 hours

Minimum 1 week prior to installation

Importance

This meeting is crucial in assuring a successful implementation at a customer site. All milestones, deliverables, assignments and due dates are reviewed and any questions are answered before proceeding with the implementation itself. A check is also made to ensure all necessary prerequisites are in place before attempting to implement.

Location

At customer site

Prerequisites

Implementation or migration purchase order

Hardware and any third-party software in place

On Line Training (may be in process but needs to be complete prior to production implementation)

Instructor Led Training (may be scheduled as long as it occurs before actual implementation services begin)

Meeting to Cover

1. Implementation project governance process including people responsible for roles, and scope change process
2. Logistics and locations of users
3. Review implementation time line to ensure users and support personnel will be available
4. Determine current status of data



5. Hardware requirements are met
6. Software requirements are met
7. Training requirements are met
8. Schedule test implementation date
9. Schedule production implementation date

Participants

Sequoia Windchill Solutions Architect

Sequoia Business Development Manager

Customer (all affected/applicable software users)





Windchill Product Implementation

This is the premier Windchill implementation services package. Customers can use this offering to establish either a conference room pilot environment on a test server, or an actual production Windchill environment. It is applicable for Windchill PDMLink, Windchill ProjectLink, and Pro/INTRALINK 9.0. In addition to software installation, Sequoia Etcetera, LLC performs software configuration and basic performance tuning as well as assists in adoption planning to ensure customers realize the business value of their implementation.

Price

Price \$10,000.00

Plus Travel and Lodging

Time

5 days

Importance

This offering focuses on providing the customer with a well thought out, properly executed, and successful Windchill implementation. Key elements to any successful deployment include the following:

- Software installation
- Software configuration and performance tuning
- Adoption Planning

This services offering provides the customer with a running Windchill system ready for customer specific testing/conference room pilot or production use. Please note that Sequoia Etc strongly advocates all Windchill customers implement a test/conference room pilot system before they implement a production system. Implementing a test system allows customers to validate the Windchill functionality before they move to it in a production environment. Performance and usability issues discovered in a test environment are much easier to handle than the same issues found in production.

This implementation package pertains strictly to "Out Of the Box" (OOTB) functionality. There is no customization services of any kind included in this



offering. Customization services if necessary can be quoted separately based on an agreed upon statement of work (SOW)

Location

On site at customer

Prerequisites

Pre-installation meeting

Hardware purchased, configured and available on the network

Network infrastructure changes implemented prior to installation

Customer completes Windchill User, System and Business Administration training classes

Services Rendered

1. Windchill software installation including Visualization and Indexing
2. Basic initial performance tuning
3. Determine best implementation configuration for the customer
4. Product/Library/Project initial configuration set up
5. Basic access permissions configuration set up (excludes folder level permissions)
6. Configure Users, Groups, Roles, Teams
7. Initial user mentoring on system use
8. Initial consultation on best method for importing data into system where applicable. Custom bulk data loaders or conversion programs are not included in the base price and can be quoted separately
9. Initial consulting on adoption plan including metrics capture

Participants

Two Sequoia Windchill Solutions Architects

Customer's Windchill Administrator(s)

Customer's users as appropriate

Customer's IT Support as needed

Additional Post Implementation Services (Recommended)

1. Performance Tuning Audit approximately 1 month after installation or by customer request.



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2. Follow up mentoring after bulk of data has been imported. This provides best practices review as well as refresher mentoring for advanced topics like change management.



Pro/INTRALINK 3.x to Windchill 9.0 Test Migration

Migrating from Pro/INTRALINK 3.x to Pro/INTRALINK 9.0, or Windchill PDMLink 9.0 involves a fundamental architectural change and should not be undertaken without significant planning and testing. Sequoia Etc has the experience and expertise to ensure your migration is successful.

This service is designed to be used in conjunction with a Windchill Software Installation.

Price

Price Minimum: \$12,000.00, Not to Exceed: \$16,000.00
Plus Travel and Lodging

Time

6 to 8+ days for installation, configuration, and migration (depending on database size, hardware, objects migrated, data cleanliness, and complexity)

Importance

Because moving from Pro/INTRALINK to the newer Windchill platform involves a fundamental architectural change, it is imperative that adequate testing and data cleansing be accomplished prior to movement of that data into a production environment. Additionally new functionality as well as a significantly updated user interface dictate that users be adequately trained prior to conversion to minimize risk and disruption in day to day operations. Failure to approach the migration in a methodical, calculated manner will almost always end in a failed production implementation, else in the best possible outcome, there will be a very slow, painful startup phase.

Location

On or off site depending on customer preferences

Prerequisites

Customers on releases of Pro/INTRALINK older than 3.3, must first upgrade to 3.4 (M030+).

Hardware purchased and available on the network (if on site)



Network infrastructure changes implemented ahead of time (if on site)
Customer completes Windchill user, System and Business Administrator training

Services Rendered

1. Current customer Pro/INTRALINK data is run through a semi-automated migration program to highlight data discrepancies and other factors associated with moving from a client server architecture to the new web architecture.
2. Discrepancies are highlighted to the customer and a combination of actions between Sequoia and the customer resolve those discrepancies. Successive test migrations are conducted until discrepancies reach an acceptable level.

Participants

Two Sequoia Windchill Solutions Architects
Customer's Windchill Administrator(s)
Customer's IT Support as needed



Pro/INTRALINK 3.x to Windchill 9.0 Production Migration

All migration decisions should be finalized before the customer begins a production migration. Products, libraries, permissions, etc are migrated from a test system to the production system (see Windchill Product Implementation) .

Price

Price Minimum: \$4,000.00, Not to Exceed: \$10,000.00
Plus Travel and Lodging

Time

2 to 5+ days depending on database size, hardware, objects migrated and complexity. Exact time quote is determined by test migration time.

Importance

Following a successful test migration program, an automated data migration is the fastest and easiest way to move existing Pro/INTRALINK 3.x data to a Windchill 9.0 production environment.

Note: manual migrations are currently necessary for Windchill customers who do not wish to migrate all or even most of their current Pro/INTRALINK database. Manual migration is also necessary for customers who purchased ProjectLink without PDMLink. Sequoia Etc can provide separate pricing and guidelines for manual migrations as appropriate.

Location

Remote services delivery
(Data stays at customer's site)

Prerequisites

Hardware purchased and available on the network
Network infrastructure changes implemented ahead of time
Successful Pro/INTRALINK 3.x to Windchill 9.0 Test Migration
Basic Windchill Product Install complete
Customer completes Windchill User, System and Business Administrator training (Migration training optional)



Services Rendered

1. Import Windchill initial configuration from test system (i.e. Products/Libraries, numbering systems, lifecycles, versioning schemes)
2. Migrate current Pro/INTRALINK 3.x data to a production Windchill server

Participants

Sequoia Windchill Solutions Architect
Customer's Windchill Administrator(s)
Customer's IT Support as needed

Additional Post Migration Services Recommended

1. Performance Tuning Audit approximately 1 month after installation or by customer request.
2. Follow up mentoring after data migration for new Windchill users.



Windchill Performance Audit

Performance associated with any enterprise process enabling technology is a critical component for success and adoption of the system. Sequoia Etc stands ready to assist customers in achieving the most performance possible out of their production implementations.

Price

Price \$2000.00

Plus Travel and Lodging

Time

1 day - On Premise

Importance

Virtually every Windchill customer has the potential to improve their Windchill system's performance. This audit package is available to any customer regardless who implemented their Windchill system and will highlight areas of potential improvement that could be obtained by additional configuration modifications in either Windchill or the underlying database.

Once documented, Sequoia Etc is prepared to help implement the recommendations commensurate with the customer's wishes and budgetary allowances. This would be a separate engagement

Location

On location at customer site

Prerequisites

Windchill implemented and in production

Services Rendered

1. Sequoia Etcetera, LLC reviews the existing configuration and analyzes modifications that would potentially improve performance.
2. Sequoia Etcetera, LLC documents recommendations for hardware, network, internet, Windchill components, and Pro/ENGINEER settings that may improve performance.

**Participants**

Sequoia Windchill Solutions Architect
Customer's Windchill Administrator(s)
Customer's IT Support as needed

Post Audit

1. Possible services to implement recommendations