# **WORLD 2015** FEBRUARY 8-11 **PHOENIX CONVENTION CENTER | PHOENIX, AZ**

#### SOLIDWORKS Successfully Prepare For Your **EPDM File/Data Migration** Jeff Barker Senior PLM Consultant InFlow Technology





#### Introduction

#### My Background...

- Senior PLM Consultant for InFlow Technology (a division of Computer Aided Technology Inc., Headquartered in Buffalo Grove, IL)
  - InFlow Technology
    - Focused exclusively on process related solutions including PDM and PLM
    - 200+ Active PDM/PLM customers
    - Full service solutions provider
      - Project Planning
      - Implementation/Migration Services
      - User/Admin Training
      - Support
      - System Customization
- 11 years of PDM/PLM experience
- Dell BPI (Business Process Improvement) Green Belt certification

#### Purpose of this presentation

An overview of best practices and pitfalls of migrations will be given along with real world examples to help prepare for a migration into EPDM. Asking the right questions and discovering issues early on is key to a migration's success.





#### Terms

- Metadata additional information about a file or folder maintained on a datacard in EPDM
- Backfill adding metadata to a file through its custom properties or secondary source
- Versions Snapshots in time of a file
- Revision The approved version of a file
- Version/Revision Stacking Taking multiple copies (versions/revisions, i.e. 123\_RevA.slddrw, 123\_RevB.slddrw) of a and renaming them to a single unique file in EPDM.





#### What Is the Intention?

Know Your Source – Common Issues

**Know Your Destination** 

How Do You Get There?





What Is the Intention?

- Reference only
  - For conversion purposes
- Source structure versus New structure
- Legacy process versus New process
- History or Latest version only
- Cleanse Fix revisions, Remove duplicate files, Fix missing references, add or update metadata





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Know Your Source - Network Drive Common Issues

- Drag and drop will not update properties in Drawings if mapped from a model \$PRPSHEET
- Drag and drop may not update references
- Duplicate files
- File reference issues
- Folders with large file/folder counts
- Revisions
- Mapping metadata
- Workflow state mapping



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Know Your Source - Network Drive Common Issues – Duplicate Files, Counts, Size

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#### Know Your Source - Network Drive Common Issues – Missing References

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Know Your Source - Network Drive Common Issues – File types

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Know Your Source - Workgroup Common Issues

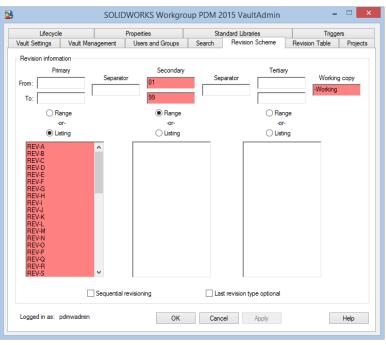
- Issues with Revision schemas
- Issues with Lifecycle states
- Issues with Toolbox components
- Understanding the "real" folder structure
- Folders with large file counts
- Workgroup properties versus custom properties
- Workflow state mapping





Know Your Source - Workgroup Common Issues – Revisions – schema must

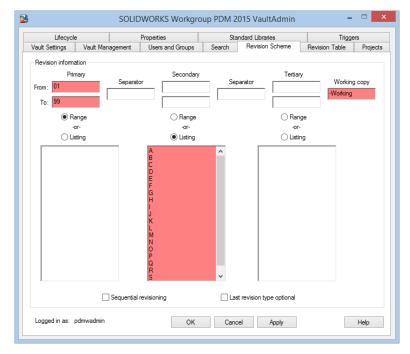
match EPDM







Know Your Source - Workgroup Common Issues – Revisions – Primary in wrong position







Know Your Source - Workgroup Common Issues - Lifecycle - Not set up or set up improperly

3	SOLIDW	ORKS Workgr	oup P	DM	2015 VaultAd	lmin	-			
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Know Your Source - Workgroup Common Issues – Toolbox/"Non-revisioned" files

are not recognized in the Workgroup migration tool

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Know Your Source - Other PDM/PLM Common Issues

Autodesk Vault, DBWorks, Windchill, Agile, Product Center, BaanPDM, SmartTeam

- Revision schema mismatch or Nonexistent
- Lack of workflow or Undisciplined workflow
- Files versus Items
- Workspaces versus Folder structure
- Lack of folder structure
- Replicated databases requires merge





What Is the Intention?

Know Your Source – Common Issues

Know Your Destination

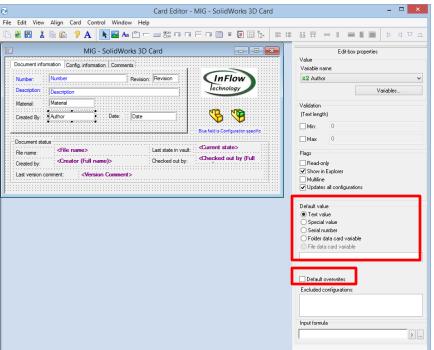
How Do You Get There?





Know Your Destination – EPDM Environment Considerations

- Migraion Datacards
  - Do not use dropdown fields
  - Deselect "Default Overwrites"
  - Remove "Default Values"

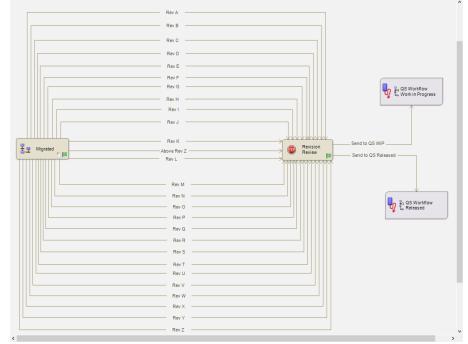






Know Your Destination – EPDM Environment Considerations

- Workflow and Revisions
  - Match Revision schemas
  - Data Migration workflow might be required to set revisions
  - Set workflow states







What Is the Intention?

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How Do You Get There?



How Do You Get There?

- Drag and Drop
- Utilize Workgroup migration utility provided by SOLIDWORKS (VARs only)
- Utilize the XML Import utility provided by SOLIDWORKS (VARs only)
- Utilize EXALEAD One Part (identify duplicate parts)
- Develop your own migration tools

IMPPORTANT: Any method that you use you should do thorough testing and validation prior to the production migration.



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What Is the Intention?

Know Your Source – Common Issues

**Know Your Destination** 

How Do You Get There?





- Review Log Files (if available)
- Compare files to be migrated to files migrated lists
- Compare the revisions and history of files between your source and SolidWorks Enterprise PDM.
- Open a small sample of the data (assembly, part, and drawing files) and run it through each transition.
- Spot check by multiple individuals and document





Final tips – If anything remember this...

- Build a plan around what you know about your source files/data to mitigate know issues
  - Timing
  - New vault versus Existing production vault
  - Where the source files are located
- Consider the migration method that you will use to achieve your goals
- Setup an EPDM environment that is migration centric versus production centric
  - Utilize out of the box EPDM functionality to assist in cleansing your source data
- Have a robust verification process to confirm your success





#### Q&A

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#### CATI and InFlow Presentation Schedule

#### Monday February, 9th

- Discovering and Understanding SOLIDWORKS Dismissed Messages 1:30pm-2:30pm Room North 229, Bryan Pawlak and Phil Whitaker
- SOLIDWORKS Composer: As Easy as Building with Legos 1:30pm-2:30pm Room North-225B, Brian Reel
- Achieving Extreme SOLIDWORKS Performance: Hardware/Configuration 2:45-3:45pm Room North-121A-C, Adrian Fanjoy and Josh Altergott
- Configuring SOLIDWORKS Toolbox 2:45-3:45pm Room North-124A/B, John Van Engen
- Successfully Prepare for Your EPDM File/Data Migration 2:45-3:45pm Room North-120B-C, Jeff Barker

#### Tuesday February, 10th

- SOLIDWORKS Duct Tape & Bailing Wire: Creative Solutions to Everyday Problems- 1:30-2:30pm Room North 129A/B, Josh Altergott and Adrian Fanjoy
- Drawings: Setup of Templates and Sheet Formats- 1:30-2:30pm Room North-221, Jim Krivoshein
- EPDM Web: Implementing and Configuring 1:30pm-2:30pm Room North-121A-C, Justin Webster
- How to Build and Maintain Effective Design Tables 2:45-3:45pm Room North-120D, Josh Altergott
- DriveWorksXpress Essentials Hands-On Lab 4:30pm-6:00pm Room North-227C, Ryan Dally

#### Wednesday February, 11th

- Achieving Extreme SOLIDWORKS Performance: Modeling Methodology 2:45-3:45pm Room North-120D, Josh Altergott, and Adrian Fanjoy
- Sharing Assemblies—Without Giving It All Away- 2:45-3:45pm Room North-221, Jim Krivoshein

#### For a copy of all CATI and InFlow presentations please go to http://www.cati.com/sww2015





