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

Successfully Prepare For Your EPDM File/Data Migration

Jeff Barker
Senior PLM Consultant
InFlow Technology

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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.

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Successfully Prepare For Your EPDM File/Data Migration

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.

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Successfully Prepare For Your EPDM File/Data Migration

What Is the Intention?

Know Your Source – Common Issues

Know Your Destination

How Do You Get There?

How Do You Know You're There?

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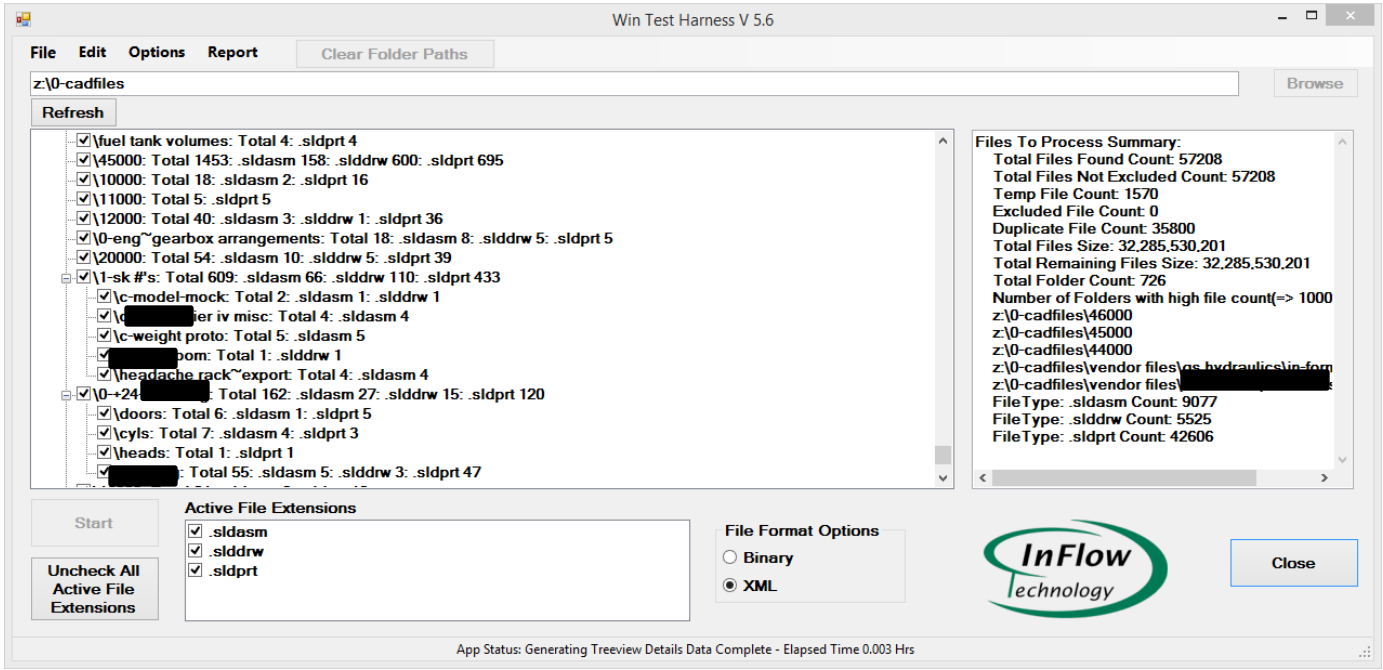
Know Your Source - Network Drive Common Issues – Duplicate Files, Counts, Size



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Know Your Source - Network Drive Common Issues – Missing References

ParentFileTo ProcessId	ParentFilePath	ParentFileName	ParentConfigName	ChildFileTo ProcessId	ChildFilePath	ChildFileName	IsChildFound
6852	z:\0-cadfiles\42000	str link.sldasm	default	-1	c:\documents and settings\bob.t[redacted]desktop\solidworks files	tube.sldprt	FALSE
7595	z:\0-cadfiles\43000	43287a.sldasm	default	-1	z:\0-cadfiles\43000	43290a.sldprt	FALSE
7595	z:\0-cadfiles\43000	43287a.sldasm	default	-1	z:\0-cadfiles\12000	12021c.sldprt	FALSE
7762	z:\0-cadfiles\43000	43369.sldasm	default	-1	z:\hyd fittings	6_xhb3-s.sldprt	FALSE
8210	z:\0-cadfiles\43000	43599a.sldasm	default	-1	z:\0-cadfiles\43000	43135a.sldprt	FALSE
8210	z:\0-cadfiles\43000	43599a.sldasm	default	-1	z:\0-cadfiles\43000	43131a.sldprt	FALSE
9558	z:\0-cadfiles\44000	44223a.sldasm	default	-1	c:\documents and settings\bob.t[redacted]000\desktop	part1.sldprt	FALSE
9894	z:\0-cadfiles\44000	44366a.sldasm	default	-1	z:\0-cadfiles\50000	53765b.sldasm	FALSE
9894	z:\0-cadfiles\44000	44366a.sldasm	default	-1	z:\0-cadfiles\50000	53766b.sldasm	FALSE
10555	z:\0-cadfiles\44000	44593.sldasm	default	-1	z:\hyd fittings	17460.sldprt	FALSE
12223	z:\0-cadfiles\45000	45274.2.sldasm	default	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12223	z:\0-cadfiles\45000	45274.2.sldasm	door closed	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12227	z:\0-cadfiles\45000	45274.sldasm	default	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12227	z:\0-cadfiles\45000	45274.sldasm	door closed	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12227	z:\0-cadfiles\45000	45274.sldasm	door open	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12227	z:\0-cadfiles\45000	45274.sldasm	all	-1	z:\hyd fittings	4_c5olo-s.sldprt	FALSE
12404	z:\0-cadfiles\45000	45343.sldasm	default	-1	c:\users\joe\appdata\local\temp\swx4820\vc~~\45343	part3^45343.sldprt	FALSE
12404	z:\0-cadfiles\45000	45343.sldasm	default	-1	z:\hyd fittings	o_lok_male_stud_run_tee_6_6_6s4omlos.sldprt	FALSE
13428	z:\0-cadfiles\45000	45932.sldasm	default	-1	z:\solidworks\shared data\solidworks toolbox\browser\ansi inch\bolts ar	socket head cap screw_ai.sldprt	FALSE
13428	z:\0-cadfiles\45000	45932.sldasm	door down	-1	z:\solidworks\shared data\solidworks toolbox\browser\ansi inch\bolts ar	socket head cap screw_ai.sldprt	FALSE
13565	z:\0-cadfiles\46000	46000.sldasm	default	-1	c:\users\joe\desktop	junk eng loc.sldprt	FALSE
13565	z:\0-cadfiles\46000	46000.sldasm	weld 1	-1	c:\users\joe\desktop	junk eng loc.sldprt	FALSE
13783	z:\0-cadfiles\46000	46078.1.sldasm	default	-1	z:\hyd fittings	16_welo_wlnl-s.sldasm	FALSE
13783	z:\0-cadfiles\46000	46078.1.sldasm	orig	-1	z:\hyd fittings	16_welo_wlnl-s.sldasm	FALSE
13783	z:\0-cadfiles\46000	46078.1.sldasm	modified 1	-1	z:\hyd fittings	16_welo_wlnl-s.sldasm	FALSE
13944	z:\0-cadfiles\46000	46151.sldasm	default	-1	z:\hyd fittings	12_c5ox-s.sldprt	FALSE
13944	z:\0-cadfiles\46000	46151.sldasm	default	-1	z:\hyd fittings	16_c5ox-s.sldprt	FALSE

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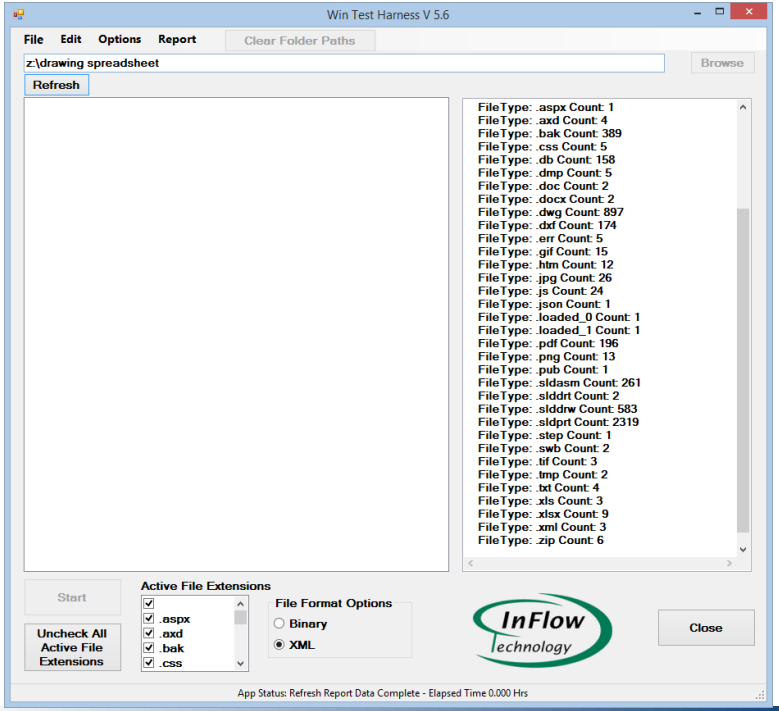
Successfully Prepare For Your EPDM File/Data Migration

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

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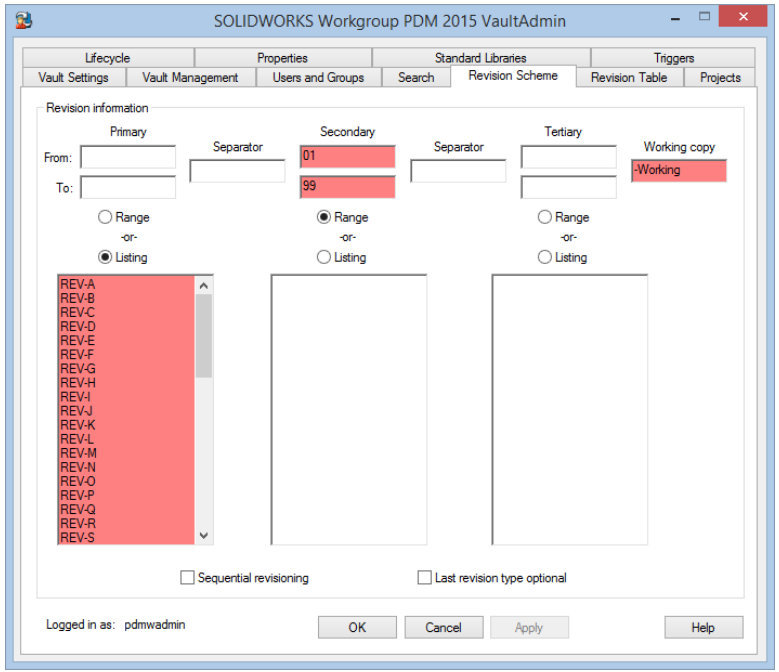
Know Your Source - Workgroup Common Issues – Revisions – schema must match EPDM



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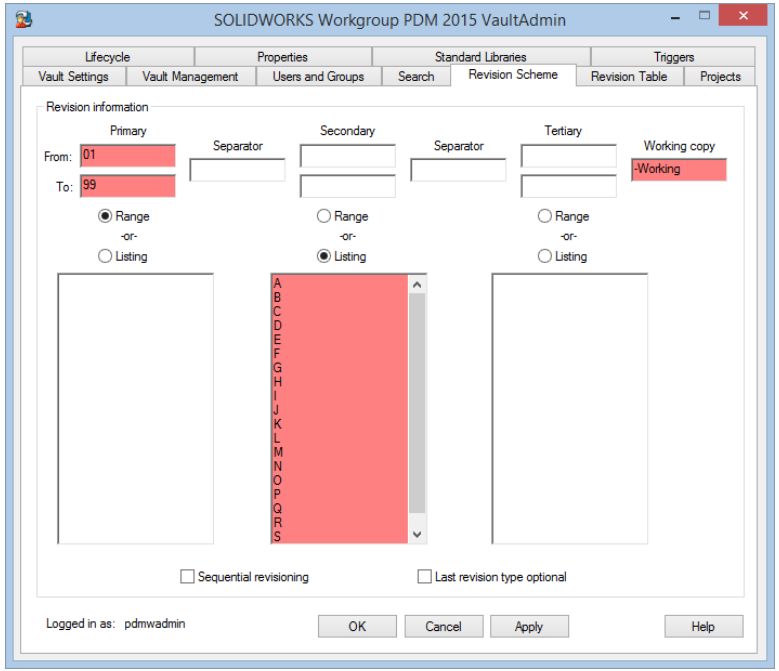
Know Your Source - Workgroup Common Issues – Revisions – Primary in wrong position



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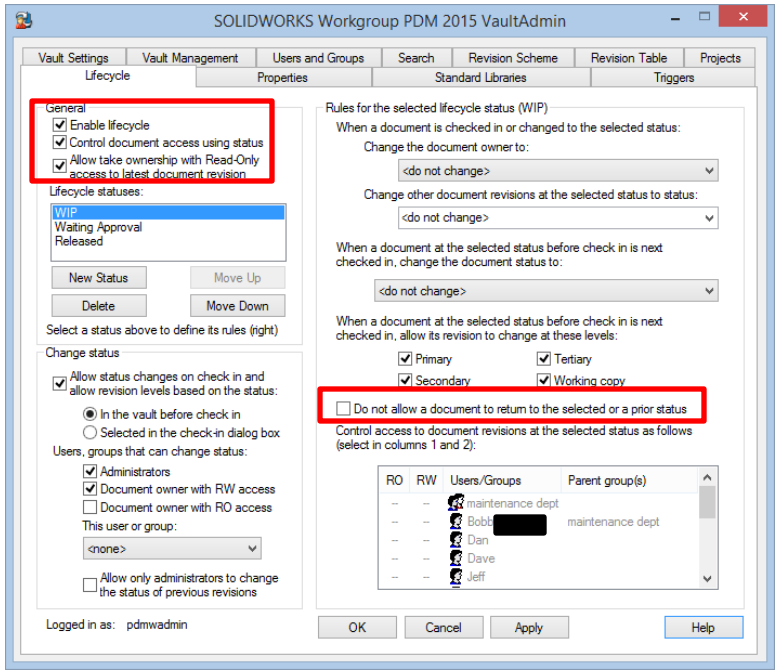
Know Your Source - Workgroup Common Issues – Lifecycle – Not set up or set up improperly



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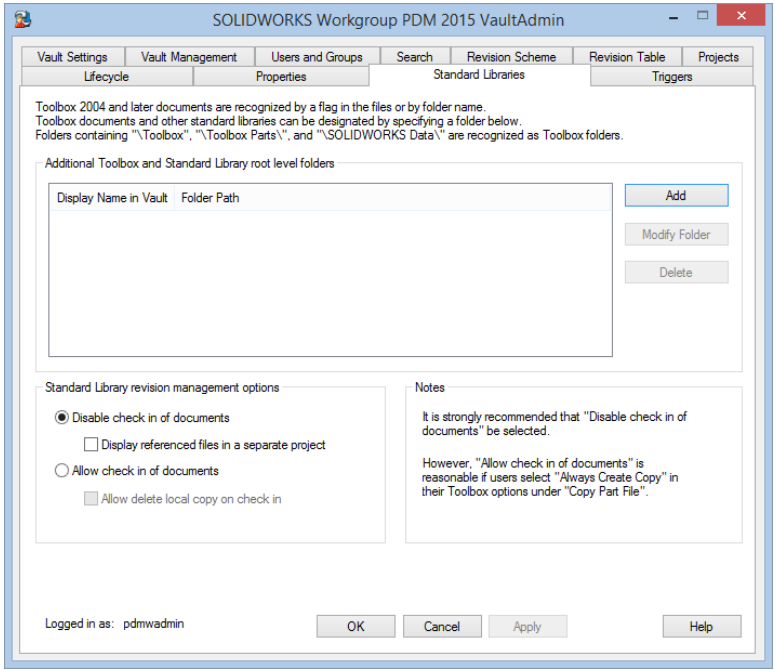
Successfully Prepare For Your EPDM File/Data Migration

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

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Know Your Destination

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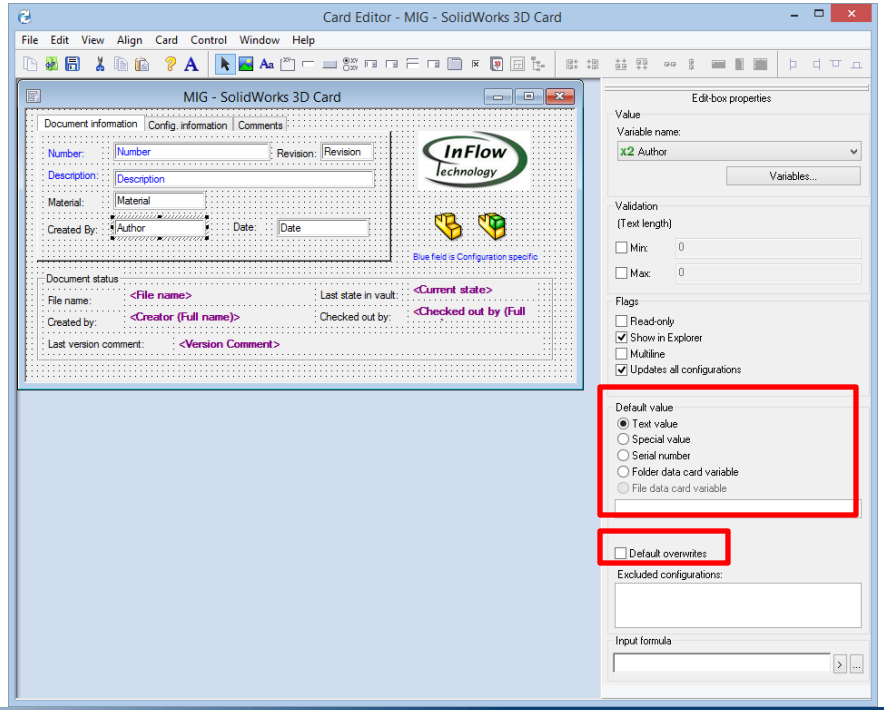
Know Your Destination – EPDM Environment Considerations

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



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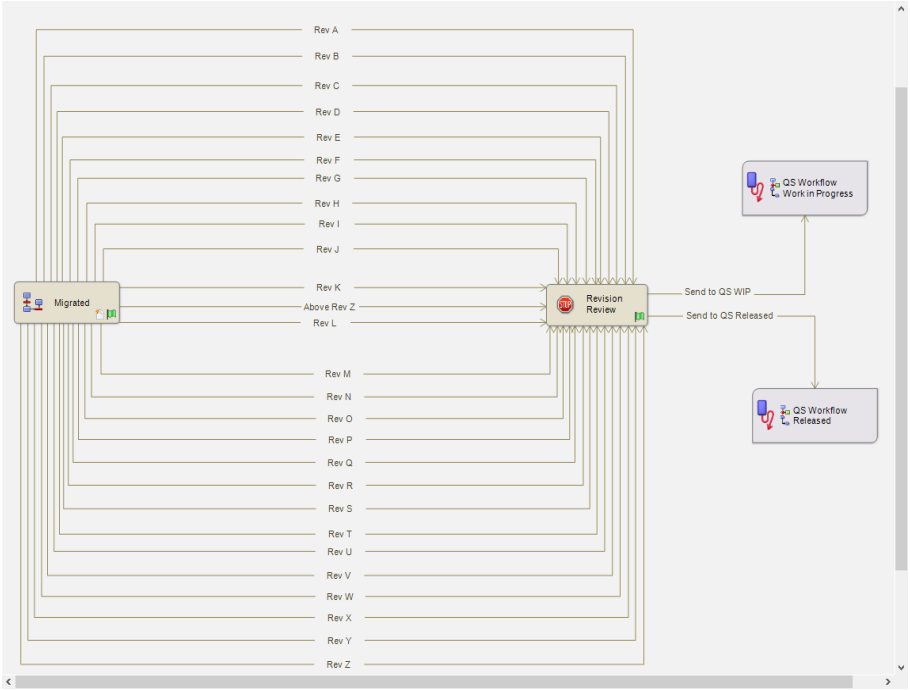
Successfully Prepare For Your EPDM File/Data Migration

Know Your Destination – EPDM Environment Considerations

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



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Successfully Prepare For Your EPDM File/Data Migration

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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How Do You Know You're 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

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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

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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

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