

PDXpert[®] PLM Acseni[®] Migration Guide

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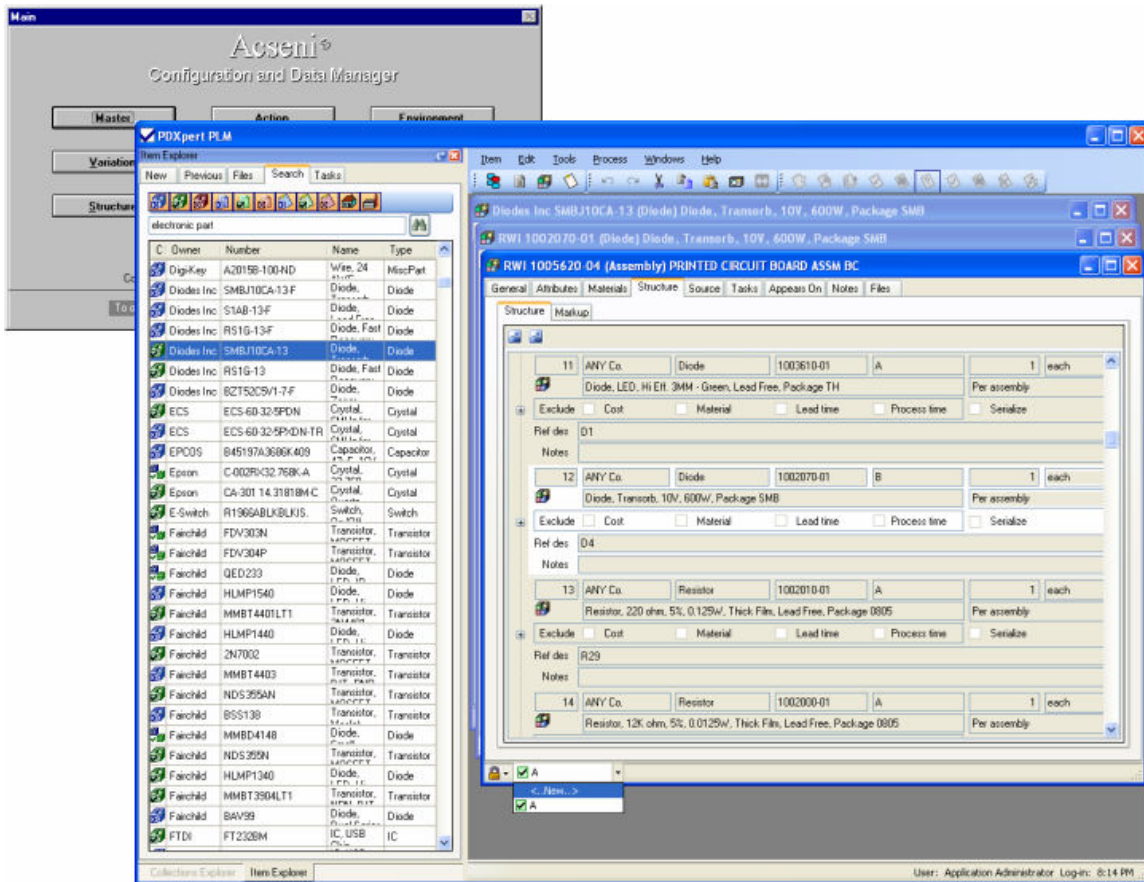
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Migrating Acseni Data into PDXpert PLM

Thank you for upgrading from **Acseni PDM** to **PDXpert PLM** software. We think you'll find **PDXpert** to continue our tradition of simple, flexible and affordable product data management software, and we're sure you'll appreciate the new features and improved ease-of-use.

This Guide describes how to move your legacy **Acseni PDM** data into the **PDXpert PLM** database:

- Prepare your current **Acseni** data for migration.
- Install the **PDXpert Application Server** (with SQL Server 2005) and **PDXpert** client. Run the **PDXpert Application Server** and ensure that you have a "blank" database with factory-defined starting values.
- Open the **PDXpert** client software, and launch the data migration utility.
- Exit the **PDXpert** client software to index your imported data.
- Open the **PDXpert** client software to enter the required software license registration key, review the imported data to reflect your desired PLM processes, and resolve any configuration errors.
- Back up your new configuration before using your imported data.

Prepare your Acseni data

Ensure that you make a backup of your Acseni database before beginning.

In general, **PDXpert** will be able to migrate most of your part, document and change form data, and a good portion of your **Environment** configuration. However, there are a few potential areas that should be examined prior to data import.

Environment → Collections

Acseni Structure Class

PDXpert uses the **Acseni Structure Class** settings to decide whether an imported item should be a part or a document, and whether that item will accept parts as components on an assembly. These **Structure Class** settings will usually provide the best results:

- Assembly:** Production Part = Yes, Child parts permitted = Yes
- Component:** Production Part = Yes, Child parts permitted = No
- Fabrication:** Production Part = Yes, Child parts permitted = No
- Implementation:** Production Part = No, Child parts permitted = No
- Reference:** Production Part = No, Child parts permitted = No
- ReqmtValidation:** Production Part = No, Child parts permitted = No

Reducing clutter in PDXpert collections

People / Places

- Your **Acseni** data may include countries that are no longer relevant (e.g., East Germany). You should delete all countries that you've never used.

Parts

- To avoid creating excess members in the **PDXpert** Sequences: Identifier collection, you should delete any unused part categories.
- To reduce duplicate data, you should delete all units of measure that you've never used. To ensure correct UoM categorization, ensure that the remaining units are accurate, especially the **Measurement System**, **Units** and **Type** values.
- Implementation cost records will be imported into the Dispositioning Actions collection. You should delete whatever records you have not used.
- Disposition site records will be imported into the Dispositioning Locations collection. You should delete whatever records you have not used.

Other Acseni configuration data

Because there are large differences in some aspects of the two programs' operation, **PDXpert** does not migrate user login information (but will create Persons collection members), **Workflow Rules**, or most **System Info** and **Options**.

Masters, variations, structures, actions → Items, structures, change forms

Auto-releasing Acseni AVL data

To support **PDXpert**'s richer item management capabilities, a supplier part that was on a master item's AVL list will be imported on the related item's **Source** list, with the source part at the same pending/released state as the master item's earliest revision. *In addition, this partner part will automatically be attached to the same implementing change form as though it had been part of the item's original release.* These parts will be listed on the change form's **Affected** list at line 0, and will be assigned revisions based on the default part revision sequence defined in **PDXpert**. Immediately before importing **Acseni** data, you may wish to modify the **PDXpert** part record revision sequence from its default value (for example, "1") to what your **Acseni** database currently uses for revisions (such as "AA").

Acseni structure data quality

PDXpert radically simplifies managing interchangeable items on structures, automatically displaying the most current revision without requiring you to explicitly process a change to the structure. This is significantly different from **Acseni**, which required a change action to be processed for each update to an item number or a revision. This difference in approach makes accurate data migration heavily reliant on your data quality, because **PDXpert** must contextually derive attributes that the **Acseni** database lacks.

Common data quality issues include: items that have inconsistent variation records (e.g., a void and a pending variation, but no issued variation), BOMs with un-issued or void variations, and BOMs that have recursion errors (i.e., an item reporting to itself or to one of its child items). The migration process will import these where possible, but some corrections may be required.

You may prefer to correct these problems within the **Acseni** database prior to moving the data to **PDXpert**.

Acseni change actions

PDXpert does not use the **Acseni** change workflow process, and cannot process change actions with incomplete status. You should ensure that all incomplete changes are accepted, rejected or deleted.

PDXpert does not allow the use of change revisions. All changes imported from **Acseni** will be re-identified by appending the change action's revision to its number. For example, a change action *1234 Revision B* in **Acseni** will become change form *1234B* in **PDXpert**.

Install PDXpert PLM and prepare the database

Install the **PDXpert Application Server** (with SQL Server 2005) and **PDXpert** client. Please refer to the **PDXpert PLM Installation Guide** (available for download on the **PDXpert** website) for detailed instructions.

After the setup is complete, open the **PDXpert Application Server**.

First-time PDXpert installation

If this is the first time you have run any PDXpert software release, ensure that the service is *Started* by viewing the **Maintenance** tab on the **PDXpert Application Server** console (click the **Start** button if the service is *Stopped*).

Updating from a PDXpert evaluation

If you have previously installed **PDXpert** for evaluation:

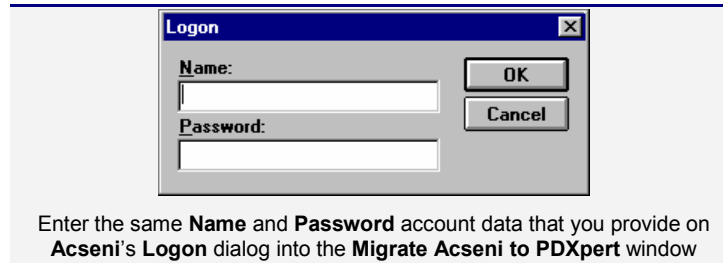
1. Ensure that the service is *Stopped* by viewing the **Maintenance** tab on the **PDXpert Application Server** console (click the **Stop** button if the service is *Started*).
2. If you wish to retain your evaluation data, perform a backup of the data using the **Backup** button.
3. Click the **Initialize** button to restore your database to the factory-defined starting values.
4. Restart the service by clicking the **Start** button.

Run the Acseni migration utility in the PDXpert client

Open the **PDXpert** client software:

1. On the **Welcome to PDXpert PLM** log-in window, use the default username `Admin` and blank password. Click the **OK** button.
2. After you see the **PDXpert** client window, you can make a change to the default "Part record" member of the **Sequences: Revision** collection. (See the section *Auto-releasing Acseni AVL data*, above). Don't edit any other **PDXpert** data.
3. Open the migration window by selecting **Migrate Acseni to PDXpert** on the **Tools** menu.
4. Configure the options in the **Migrate Acseni to PDXpert** window:
 - **Acseni data file.** Click the **... (Browse)** button to navigate to and select the Acseni database file. This file is named `ECH-DATA.MDB` and by default is installed in the folder `C:\Echelon\Data\`
 - **Acseni security file.** Click the **... (Browse)** button to navigate to and select the Acseni security file. This file is named `ASI-LOCK.MDA` and by default is installed in the folder `C:\Echelon\Data\`

- **Acseni Logon name** and **Acseni Logon password**. These are the same values that you use to log onto **Acseni**. You must enter the appropriate **Name** and **Password** of a current **Acseni** administrator.



- **Acseni library files folder**. The **PDXpert PLM** file library capabilities are different from the ones originally designed into **Acseni**. **PDXpert** no longer needs to limit the number of files in its `\Library` folder, and therefore doesn't support path segmentation and relative path information. If your **Acseni** installation uses more than one folder, all files should be moved into a single folder prior to migration to the **PDXpert** database. (This folder will usually be specified in **Media/Location** as the **File Type: (xxx) Storage Path.**)

When your files are in a single folder, click the **...** (**Browse**) button to navigate to and select the **Acseni** library folder.

If you do not have any files for your items, you can leave this empty.

5. Begin the data migration by clicking the **Migrate Data** button.

Note The data migration typically takes between 30 minutes and 60 minutes, depending upon many factors including the complexity of your **Acseni** data, the number of records to be imported, and the performance of your computer. For the fastest and most reliable results, do not use the computer for any other tasks while the data migration is running.

6. When the data migration is finished, you'll see a message like this:

Data migration is complete. Close this PDXpert client now, use the PDXpert Application Server to index the database, and then re-open the PDXpert client.

Close the **Migrate Acseni to PDXpert** window, then exit from the **PDXpert** client program by selecting **Exit** from the **Item** menu.

Index your imported data

To index your database:

1. Open the **PDXpert Application Server** console from either the system tray or from the Windows **Start** menu.
2. On the **Maintenance** tab, stop the service by clicking the **Stop** button.
3. Index your imported data by clicking the **Reindex** button. This operation can take up to 30 minutes, depending upon the size and complexity of your product data as well as your server's performance and current loading.
4. When the indexing is done, click on the **Start** button to resume the service.

Configure the collections

Open the **PDXpert** client application again.

You'll probably be prompted for the software license key which has been provided to you. After you've correctly entered all of the registration data, the **OK** button will be enabled, and you can click it to proceed.

Note Do not perform the data import unless you have a license key. Since you're using the starting values of the **PDXpert** database, the client application may be opened without a registration license, but the data import activity and subsequent indexing will prevent further access without a license key.

We recommend that you take this opportunity to examine all of your current processes. **PDXpert PLM** gives you new tools to simplify and streamline many product management practices that you first established in **Acseni**.

Review the imported data in the Collections Explorer, and make some notes on how **PDXpert's** collections should be changed to match your company's processes and current data. You'll need to decide how any invalid **Acseni** collection members should be changed to conform to **PDXpert's** data rules.

Note The migration process imports your user data into the Persons collection, but does not retain any log-in account information. Because **PDXpert's** security and licensing scheme is significantly different from **Acseni's**, you will continue to use the default Admin user to assign new user accounts. (You may also see a second "Admin" account imported from **Acseni**; to simplify things, you should delete this record.)

It's better to look for and resolve duplicate collection members now, before users add more items to your database. (After an incorrect member has been assigned to an item, it can no longer be deleted from the collection.)

If you've deleted your unused **Acseni** configuration data (like unused countries and units of measure) before importing them, your existing data probably relies on the remaining data elements. As a general rule, you'll be deleting the unused **PDXpert** collection members rather than deleting the imported data. Before you delete the **PDXpert** collection members, make sure you print out their values (such as conversion constants) so that you can update the imported data with the required values.

Note The unit of measure conversion constants in **PDXpert** are the inverse of **Acseni's**, and generally use a different base unit (e.g., gram versus kilograms), so all imported measurement units will need to be reviewed and updated.

Tip The ISO 3-character currency codes (USD, JPY, GBP, INR, CNY, etc.) with current exchange rates can be found on the Internet; see, for example, the www.xe.com website. Use these to replace the older **Acseni** currency values, such as US\$, ¥, and £, as well as updating European countries' older currency (e.g., French franc) to EUR.

In particular, look for duplicate Countries, Currencies, Document Types and Part Types. Delete both duplicate and unused Change Forms, as well as their related number generators in the Sequences: Identifier collection. Verify that Identifier Sequences are accurately defined and are correctly assigned to the appropriate Document Types, Part Types, and Change Forms. Edit any Organization members that have exceeded their maximum **Display name** length.

Tip If you find there are a lot of errors in your **Acseni** data, you can choose to correct them in **Acseni**, and then repeat the migration process. Just make sure that you always start with an initialized database, as described in *Updating from a PDXpert evaluation* on page 4.

Finally, review and configure all of the **PDXpert** collections that were not affected by the data import, but could impact your system operation. Please refer to the

PDXpert PLM Evaluation Guide (available as a download from the **PDXpert** website) and to the design and configuration topics in the **PDXpert PLM** help file (*Contents > Setting up PDXpert PLM*).

Back up and validate your changes

Before creating new documents, parts and changes, use the **PDXpert Application Server** to make a backup of your final configuration. You can use this backup to restore and tweak your configuration.

Create a few new items to determine whether you have the appropriate settings and collection members. If you're not satisfied, restore the most recent database backup and modify the collections further. Repeat this process until you're ready to release the database to your end users.

Until you're comfortable that the imported data is accurate, as part of your normal engineering change process you should systematically review and, if necessary, update imported item, revision, and structure data.

If you have any questions about industry best practices and process design tradeoffs, please do not hesitate to contact us for configuration advice.