PDXpert® PLM
Acseni® Migration Guide

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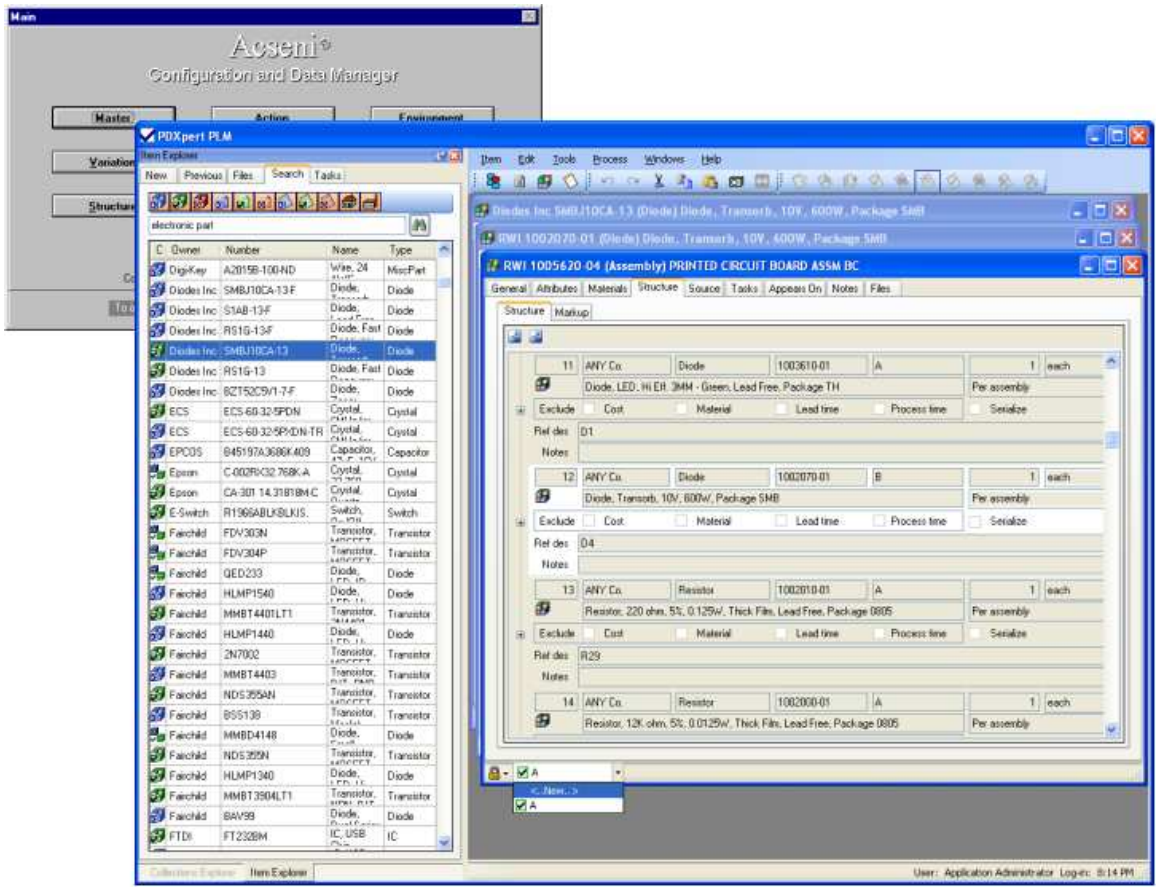

Migrating Acseni Data into PDXpert PLM

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.

> These instructions are equally applicable to migrating from the earlier Echelon PDM system.

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

- Complete any in-process change actions & back up your current **Acseni** data.
- Install the **PDXpert Application Server** (with SQL Server) and **PDXpert** client.
- Prepare your current **Acseni** data for migration, and send it to us.
- Restore the database that you receive from us.
- Open the **PDXpert** client software to review the imported data and resolve any data migration issues.
- Back up your new configuration before using your imported data.

Finish in-process change actions & back up your data

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.

You'll be making changes within **Acseni** to prepare your existing data for migration. Before making these changes, back up your existing **Acseni** data.

Install the PDXpert PLM system

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

You can refer to your **PDXpert** system and related help file during the following procedure.

Prepare your Acseni data

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.

> The migration process imports your user data into the Persons collection, but does not retain any log-in account information. Let us know if you want us to configure your list of desired accounts (person name, log-in account name, password, full-function/read-only access, role, email address).

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 big 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**.

> Let us know if you 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 "A").

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 should correct these problems within the **Acseni** database prior to moving the data to **PDXpert**.

Acseni change actions

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**.

Send your data to us

> From this point, any further data management activities (creating or revising parts or documents, processing change actions) within **Acseni** will have to be manually reproduced after you receive your migrated **PDXpert** data. If possible, your Acseni data should be used only for viewing.

You'll be sending us the following:

- **Acseni** database (the Microsoft Access .MDB and .LDB files) in a compressed (.zip) file
- The administrator log-in account name & password
- The file attachments in a compressed (.zip) file
- Any special import instructions, such as default revision formats and persons.

Restore the database that you receive from us

Using the **PDXpert Application Server**, you'll follow the instructions for restoring a database as described in the help file (*Contents > How do I...? > Restore data from a backup*).
We may provide other instructions with your migrated data.

Configure the collections

Open the **PDXpert** client application.

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.

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.

> 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.
>
> 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.

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 > How to configure PDXpert*).

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, contact us for configuration advice.