

Windchill Upgrade Process

Preliminary Activities:

1. Complete a Health Check of the current Windchill environment (90 minutes)
2. Prepare servers for Target environment, assumes virtual servers are currently being used – ULA IT Staff (2 hours)

Pilot Upgrade Process:

1. Clone current Production Windchill environment to create Pilot environment (2 hours)

The following steps would be completed without any required involvement from ULA IT staff. All hours are approximated.

2. Windchill Diagnostics (24 hours)
 - a. Install WINDU (Windchill Diagnostic Utility) patches on the Pilot environment
 - b. Run WINDU (Windchill Diagnostic Utility) on the Pilot environment
 - c. Identify and document any errors that could cause issues with the upgrade
 - i. Resolve Know Errors
 - ii. Work with PTC Tech Support to resolve new errors
3. Install Windchill 11.0 on Target system for Pilot (4 hours)
 - i. Download Installation Media
 - ii. Install Database on Target environment
 - iii. Install Windchill 11.0 on Target environment
 - iv. Confirm ability to log in to 11.0 Target environment
4. Pilot upgrade (32 hours)
 - a. Export database from 10.X Pilot environment
 - b. Export ldap from 10.X Pilot environment
 - c. Import database into 11.0 Target environment
 - d. Import ldap into 11.0 Target environment
 - e. Run the Windchill Upgrade Manager on the 11.0 Target environment
 - f. Identify errors reported by the Upgrade Manager
 - i. Apply documented resolutions to known errors
 - ii. Test potential resolutions of know errors with multiple solutions
 1. Identify and document the correct resolution to be used during the production upgrade
 - iii. Work with PTC Tech support to test and resolve unknown errors
 1. Document the resolution to be used during the production upgrade
 - g. Complete upgrade
 - h. Test

5. Schedule Production Upgrade

Production Upgrade Process:

The following steps may not require ULA IT staff hours, but they will need to be on stand by the weekend in which the production upgrade is completed.

1. Back up the Production environment (2 hours)
2. Repeat the Pilot upgrade process, using the documented error resolutions, on the Production system (16 hours)
 - a. Install and run WINDU on Production environment
 - b. Export database and ldap from Production environment
 - c. Import database and ldap into Target environment
 - d. Run Windchill Upgrade Manager on Target environment
 - e. Test

Post Upgrade Activities:

1. Upgrade CAD Worker – BOUNDARY SYSTEMS (4 hours)
2. Upgrade Etrage PSW server – ETRAGE (TBD)
3. Delete Creo Parametric local workspace cache, and re-register Windchill server on client machines – ULA (4 hours)
4. Upgrade Windchill Workgroup Manager for AutoCAD on client machines – ULA (8 hours)

Participation Required by ULA Staff:

Internal ULA resources will be responsible for the following activities:

- Preparation of the server for the Target Windchill environment
- Preparation of the Windchill Pilot environment
- Providing Boundary Systems with the access need to all servers
- All client side upgrades to Creo Parametric, AutoCAD, and the Windchill Workgroup Manager

In addition to the above responsibilities, the following availability of ULA staff will be required:

- Availability of IT personnel by phone or e-mail during the pre-scheduled days of the upgrade
- Availability of a Windchill Administrator to test the upgraded environments (both pilot and production)
- Weekend availability of both IT representative and the Windchill Administrator on the weekend of the production upgrade