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About this Manual

Throughout this manual you will see Tools which are files that should be used to augment the implementation.

Quick Start Tool
Name of Tool
Application File Format
File Name

Quick Start Tool Definitions

- Quick Start Tool – indicates a tool that can be located and downloaded from the VRC in the Quick Start section of PDMWorks Enterprise
- Name of Tool – what the tool is intended for
- Application File Format – what program was used to create the tool
- File Name – the actual file name of the tool including the extension

Important and helpful Tips will be highlighted in the following format:

Tip
Create a shared directory on a Server (not the PDMWorks Enterprise server) to be used to keep material related to the PDMWorks Enterprise implementation.

Key concepts and important ideas will be designated as Notes such as:

- Note -
It is extremely important to discuss with the customer some of the PDMWorks Enterprise capabilities beyond basic SolidWorks data management that can be explored after the initial Quick Start implementation.

Introduction

This document will discuss what is involved in conducting a PDMWorks Enterprise Quick Start implementation. The Quick Start Program is designed as a short implementation with a limited project scope. The implementation involves focusing on basic management of SolidWorks data within the engineering group of an organization.

The Quick Start can be used in many ways including:

- Production System for Small Companies
- First Phase for Medium to Large Companies
- Pilot Project for Large Companies

This document will discuss what should be involved in conducting a 5 day Quick Start PDMWorks Enterprise Implementation geared to only manage SolidWorks data in the engineering organization.

It should be noted that PDMWorks Enterprise has the ability to provide complete and robust data management throughout an enterprise. These additional capabilities are not included in the Quick Start Program, but can be easily added in future implementation phases.

- Note -

It is extremely important to discuss with the customer some of the PDMWorks Enterprise capabilities beyond basic SolidWorks data management that can be explored after the initial Quick Start implementation.

Definitions

Stakeholders

The role of stakeholders or core team is used to have a group of people to oversee the implementation. These people are empowered to make key decisions regarding the implementation. It may become necessary as part of the implementation for changes to be made to the system or company's processes; accordingly an empowered group of people (person) will need to be available to authorize such changes. In addition, they may want or should want to provide their input on how the system will be designed. The team will usually include users and managers in Engineering, Manufacturing and IT departments and can expand to Purchasing and Marketing departments depending on the size and scope of the implementation.

For the 5 Day PDMWorks Enterprise Quick Start the role of the stakeholders is reduced as the scope any decision making for the implementation is drastically reduced.

PDMWorks Enterprise Administrator

The PDMWorks Enterprise Administrator is a person identified by the customer who will play a critical role in the implementation and needs to be an overall advocate for PDMWorks Enterprise. In most cases the champion becomes the PDMWorks Enterprise administrator. Usually a senior designer will take on the responsibility of PDMWorks Enterprise Administrator:

- Understanding of company's procedures and practices
- Understanding of the company's engineering process specifically its CAD products and how the company uses it
- General understating of IT tasks - Installing software, Windows, Shared directories, services, creating users, groups and permissions
- Bonus skills, but not required, are the understanding of databases and .NET programming

The PDMWorks Enterprise Administrator does not necessary need to be a resource from the company implementing PDMWorks Enterprise. As the PDMWorks Enterprise Administrator is required during 100% of the implementation he is not necessarily needed 100% for post go live. In some cases, a company may want to just outsource the PDMWorks Enterprise Administrator role. In this case, the implementer would act as the PDMWorks Enterprise Administrator and a support contract would be put in place for the implementer to perform PDMWorks Enterprise Administrator responsibilities (mostly support) post go-live.

-Note -

It is strongly recommended that the PDMWorks Enterprise Administrator will be a member of user community rather than IT if possible.

Pilot Project

Depending on the size of the roll out and criticality that PDMWorks Enterprise will play in the customers operations, it may make sense to first conduct a pilot before a complete production roll out.

The Pilot Project of the implementation sets time aside for a select group of users who intend to use the system to work in a pre-production/limited production environment. The customer will usually determine how long the pilot should last and what functionality and operations should be addressed during the pilot. The implementer's involvement is minimal during this time, mainly just to hear feedback from the customer as to the customer's progress and / or any issues with the pilot. After the pilot is complete or during the pilot the implementer will address any issues discovered and some time needs to be allocated to address them. The main benefit of a having pilot program in the implementation is to provide time for issues to surface that may not have been considered during the processes development section of the implementation.

Many companies tend to de-prioritize the pilot. Training and Piloting is absolutely critical to project success. Most behavior issues and bugs can be found during pilot and avoid a backfire when rolling out to production. While working with customers and conducting a larger scale implementation, it is important to insist on a pilot from day one. Pilot length is a function of number of users, volume of data, what departments are involved, how many user scenarios are managed in

the system, etc. Pilot can take anywhere between few hours to few weeks.

Statement of Work (SOW)

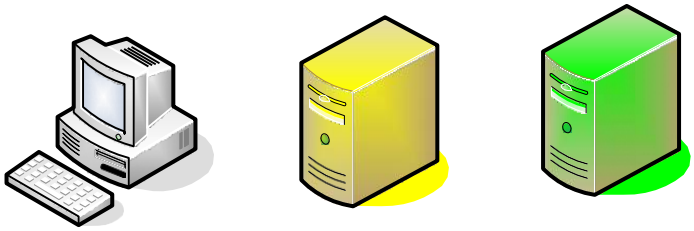
Quick Start Tool
Kick Off Presentation
PowerPoint
PDMWE_QSP_SOW_ENG.doc

When engaging with a customer to implement PDMWorks Enterprise, it is essential that a Statement of Work (SOW) is developed detailing:

- The scope and tasks of the work to be performed.
- Assumptions made regarding the implementation (i.e. for email notification, it is assumed that customer IT department is responsible to configure and test the SMTP server, etc.)
- Customer requirements – what will be required by the customer in order to complete the tasks. Such prerequisites from the client may consist of IT related issues, project related requirement (i.e. availability of respective personnel, etc.)
- Estimated Time for each task
- Acceptance criteria and any deliverables if applicable
- Price

In regards to the 5 day PDMWorks Enterprise implementation once a SOW is created for it, it mostly can be re-used for other customer implementations. Creating SOWs template will save significant office work for the long run.

Hardware and Software Requirements



Client Workstations | Archive Server | Database (SQL) Server

Here are a few points that the implementer and customer should be aware in planning the implementation.

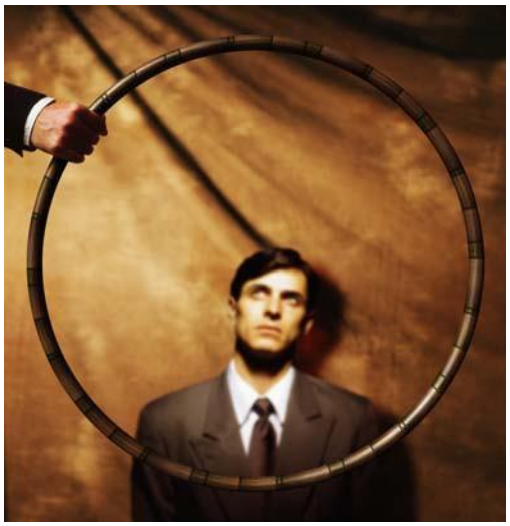
- Hardware Requirements
  - Provide the current link to the PDMWorks Enterprise hardware and software requirements to allow the customer to order the appropriate hardware. Current link below – check to make sure up-to-date: http:/ /pages/services/SystemRequirements.html
- Dedicated Servers
  - It is important to recommend dedicated servers for PDMWorks Enterprise Database and Archive servers.
  - If servers are shared, there is a need to analyze such usage to determine potential overload of the servers.
  - Examine how much memory is available for PDMWorks Enterprise application and SQL, as well as the computing power as measured by the number of processors and cores.
  - In some cases the DB server maybe used to serve other application data bases. In that case check Microsoft's MSDN site for recommendations according to expected performance.
- New or Used Hardware
  - Determine if existing servers be used or new servers ordered. If new servers are ordered, understand when the servers will be delivered and configured on the customer environment. This will impact when the implementation can start
- Test Environment
  - Has the customer considered setting up a test environment to mimic their production PDMWorks Enterprise environment? If so, will additional hardware be required? Should it be purchased at this time?
- Replication
  - If Replication of the vault is required the following considerations need to be taken into account:
    - If the PDMWorks Enterprise Web server are used they should be installed in same location as the remote archive servers.
    - If the remote location is overseas what is the best strategy to replicate the data. For instance if there is

a lot of data to replicate from US to China (CAD volume of data) it may take a few days for initial data replication, in which the remote users will not have access to data.

- On the other hand building the servers in primary location and shipping to remote location make take time due to customs regulations, tariffs and trade laws.
- Such decisions are also dependant on the collaboration strategy between sites.

Pre-Implementation

Setting Expectations



Before selling the PDMWorks Enterprise Quick Start implementation, the customer should be fully apprised of the advantages and value of the program as well as the initial limitations.

The advantages include a rapid and proven implementation that can be put into production in only a week.

A key advantage of starting with a limited scope implementation is that this allows for an implementation with a fast return on investment (ROI) for the customer. This will demonstrate how PDMWorks Enterprise can be easily implemented and the value it brings. An early success for the champion or sponsor within the company will help

foster a long-term relationship with the VAR and Service Provider as well as help the champion obtain funding and approval for future projects.

Once the customer is successfully using the basic functionality of the product, it will be easier to grow the solution throughout the customer's enterprise. The customer will now be more comfortable with the product, will better understand the system capabilities and how they can fit in with the companies existing and desired processes. This results in better communication with the implementer on how to best expand PDMWorks Enterprise throughout their organization. The customer will also be able to observe the value of the system in operation and how the system can be used in other departments within the organization.

It is important to note this only a five day implementation and not all features of PDMWE may be deployed at this stage.

Make sure that the customer agrees with the concept of starting with a short, easy-to-implement solution which can grow with time and does not expect more than can be accomplished within the limited time period.

Tip

It cannot be overstated how important it is that the customer understands they are receiving a limited scope implementation. This needs to be acknowledged by all parties involved to avoid any confusion or misunderstanding once the Quick Start is complete.

The customer should understand what will be included in the initial implementation and what areas are not included, but may be considered as options for future phases or implementations.

Mandatory Scope	**Notes / Extras**
File Types Only SolidWorks data will be managed with this project including parts, drawings and assemblies.	The management of additional file types such as Microsoft Office (xls, doc, ppt), Adobe Portable Data Format (pdf) files and raster images (tif, jpg, cal) will be discussed during the Administrator training.
Workflow Only one basic workflow process	Any advanced workflows including those with parallel nodes or ad hoc capabilities

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