Successful Strategies for Rapidly Upgrading PTC Windchill 9.1 to Windchill 10.1 on a Light Budget

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• 1991-June 2000: Ohio Northern University (Advanced Robotics and Automation)

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Introduction

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The Frugal Times

• Economic uncertainty
  – Economy
  – Continuing Resolution
  – Shift to commercial space flight

• Budget restraints
  – Personnel reductions
  – Environment reductions
  – New equipment guidelines

• Still need to maintain corporate operations
  – Operations for Johnson Space Center
  – Managing engineering data for International Space Station flights
  – Operations for general research
  – Managing engineering data for Multi Purpose Crew Vehicle (MPCV)
  – Staying current with software and hardware
Historical Upgrade Process

- Purchase/obtain new servers for the upgraded environments
- Establish additional network and storage resources
- Establish the new system environments
- Integrate Active Directory (AD) authentication with webserver
- Load Windchill and integration custom code
- Run WinDU reports and repair data if needed
- Load systems with production data
- Regression test systems
- Train users
- Perform many runs against the database
- Release system to users

(8.0 to 9.1 took 15 months to complete)
Planning for Possible Constraints

Things to Consider:

• **Age of the current hardware**
  – Speed and capability of the current servers to support new software
  – When is the refresh planned

• **Technological Changes**
  – Traditional racked servers?
  – Virtual servers local?
  – Virtual servers remote?
  – Cloud services?

• **Budget challenges**
  – Reduced services
  – Reduced personnel
  – Customer initiated paradigm shift

• **User Environment**
  – Constantly changing with no control of the changes and their timing

• **Corporate events**
  – Management tasks
  – Contracts changing
  – Personnel changes
  – Environmental changes
  – Policy changes

• **Software compatibility between:**
  – Current and upgraded PDMLink system
  – CAD software and PDMLink
  – Web browser and CAD software
  – Workstation OS and web browser

• **Critical software release dates**
  – Contracts using the system
  – Major events with projects
  – User training
  – PTC release dates
## PTC Compatibility Matrix

### Quick View

<table>
<thead>
<tr>
<th>PDMLink 9.1 M50 Current</th>
<th>PDMLink 9.1 M50 Transition</th>
<th>PDMLink 10.1 M30 Upgraded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solaris OS 10 03/05</td>
<td>Solaris OS 10 08/11</td>
<td>Solaris OS 10 08/11</td>
</tr>
<tr>
<td>Java 1.6.0_18</td>
<td>Java 1.6.0_33</td>
<td>Java 1.6.0_33</td>
</tr>
<tr>
<td>Oracle 10.2.0.4</td>
<td>Oracle 11.2.0.3</td>
<td>Oracle 11.2.0.3</td>
</tr>
<tr>
<td>DS 1.2</td>
<td>DS 1.3</td>
<td>DS 1.3</td>
</tr>
<tr>
<td>Tomcat 6.0.20</td>
<td>Tomcat 6.0.20</td>
<td>Integrated in Method Server</td>
</tr>
<tr>
<td>Apache 2.2.15</td>
<td>Apache 2.2.21</td>
<td>Apache 2.2.21</td>
</tr>
<tr>
<td>CAD Workers WF4</td>
<td>CAD Workers WF5</td>
<td>CAD Workers Creo 2</td>
</tr>
</tbody>
</table>

Reference: Windchill90M080SoftwareMatrices081909.pdf
In Place Upgrade Process

All activities performed in all existing environments

- **Pre-upgrade Activities**
  - Run WinDU reports to insure data transferability
  - Upgrade server
  - Upgrade Windchill components
  - Upgrade database
  - Build migration installation

- **Upgrade Activities**
  - Move migration installation
  - Run migration tool
  - Upgrade Apache
  - Test upgrade

- **Post Upgrade Activities**
  - Establish keyword index
  - Bulk publish viewables
  - Rerun WinDU reports
Pre-Upgrade Activities

All performed in place on existing environments

• Run WinDU reports
  – To insure data integrity for migration
  – Roughly 14 million objects including Apollo, Shuttle, Station to Multi Purpose Crew Vehicle (MPVC) or Orion

• Upgrade server
  – Solaris upgrade from version 10 03/05 to Solaris 10 08/11
  – Upgrade file system to ZFS for file system and volume management, snapshots and clones, continuous integrity checking and automatic repair
  – Java upgrade from 1.6.0_18 to 1.6.0_27 for compatibility and security

• Upgrade Database
  – From Oracle 10.2.0.4 to 11.2.0.3+

• Build Migration Installation
  – To be used for the upgrade manager
  – Testing the upgraded customizations

• Directory Service (DS) Upgrade
  – From 1.2 to 2.3

• PSM Install
  – Monitor usage before and during rollout
  – Tuning of the new system

• MCAD Workers Upgrade
  – From WF4 to Creo2

• Customizations Upgrade
  – From 9.1 M50 to 10.1 M30
  – Minimize moving forward customizations
Upgrade Activities

• Move 10.1 System
  – Move to the master servers file system for speed
  – Can be done on a live system
  – Live system is stopped once to test migration system
  – Test functionality

• Apache Upgrade to 2.2.21
  – Place in environment
  – Test for functionality

• Run Upgrade Manager
  – Backup database and code base
  – Redirect resources between 9.1 and 10.1 PDMLink
  – Run upgrade
  – Test upgraded system
Post Upgrade Activities

• Viewable Regeneration
  – Bulk publish all the CAD objects in the system

• Indexing Generation
  – Reindex the system with SOL (new indexing software)
    • Documents first
    • Larger files second
    • Zip and last

• WinDU Reports for 10.1
  – Run to insure data integrity after upgrade
  – Create a baseline for future loads

• Resource Return
  – Return virtuals used for upgrade
  – Return storage copies used for upgrade
Results of The Upgrade

• System outage started on Thursday April 4th at 5:00pm
  – Ended on XXXX

• Backups ran from xxx to xxx

• Upgrade Manager ran from xxx to xxx

• Regeneration of Viewables
  – ran from xxx to xxx

• Regeneration of Keyword Index Status
  – XXX

• WinDU Reports for 10.1 results
  – XXX
Tips for An Upgrade On A Shoestring Budget

• Upgrade current system components in place avoiding the purchase of new hardware

• Migration environment can be a virtual machine zoned on one of the existing servers

• Transferring the migration environment to the same server as the environment to be upgraded eliminates all the network slowness

• The only extra resource needed was the storage for the production database and for the data to be placed against the staging environment for a one to one comparison run against the production environment.

• Coordinate the upgrade with everyone from the users to management to avoid scheduling pitfalls and software incompatibilities

• To use the updated DS with 9.1, you will have to obtain a “fix” from PTC
Tips for An Upgrade On A Shoestring

• Upgrade
Questions
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