Data Management Solutions for Pro/INTRALINK® 3.x Customers
Choosing the Right Option

As more new capabilities continue to be added to Windchill®, users of the older Pro/INTRALINK 3.x solution need to decide which of the modern, web-based PTC data management solutions they should transition to.

With its production-proven Pro/ENGINEER® workgroup data management capabilities, Pro/INTRALINK is the industry-standard solution for managing concurrent design teams and the power of Pro/ENGINEER associativity. Pro/INTRALINK understands and manages all Pro/ENGINEER files and relationships, so engineers can concentrate on innovative product design. And recent releases of Windchill, which include Pro/INTRALINK, continue to provide important new capabilities, such as improved usability, enhanced Pro/ENGINEER integration and data management, and the opportunity to achieve business-process optimization.

However, with no more releases of the older Pro/INTRALINK 3.x solution, and with maintenance reduced to the sustained support level, Pro/INTRALINK 3.x users need to ask themselves: What data management capabilities do we need both now and in the future? Will we just need to manage CAD mechanical models or our entire “digital product” including: electrical CAD files; design, quality, and manufacturing specifications; market and technical product requirements; software modules; as well as documentation and other media used to define and test the product’s behavior.

Moreover, Pro/INTRALINK 3.x users should also consider whether this new solution needs to support product development processes, such as design outsourcing, manufacturing process management, change and configuration management, and technical publications. By focusing strictly on managing Pro/ENGINEER data and the processes of the Pro/ENGINEER workgroup, Pro/INTRALINK does not readily accommodate the requirements for being a single source of data that can manage the complete “digital product,” nor can it address the growing cross-functional nature of product development.

A Range of Flexible Options from PTC

As you assess your current and future data management needs, keep in mind that PTC offers multiple data management solutions. Windchill PDMLink® delivers a powerful set of workgroup and enterprise PLM capabilities blended with additional CAD system integrations, visualization services, and predefined engineering change and configuration management processes and workflows. Pro/INTRALINK 9.1 provides the same core Pro/ENGINEER workgroup data management capabilities that Pro/INTRALINK 3.x customers have come to expect, but in a new architecture that results in a more integral experience for Pro/ENGINEER users. And, in certain situations, Windchill ProductPoint® may be the optimal PDM solution, as it builds upon the capabilities of Microsoft SharePoint® to help dispersed teams work concurrently, find the right files, and share product development data throughout the company. No doubt, determining which solution is right for your organization depends on your particular needs. On the following pages, we’ll help you make that important decision.
Which Data Management Solution Is Right for You?

In order to determine which solution will best meet your needs, you need to consider how the solution will be used and who needs to access the information.

Moving from Pro/INTRALINK 3.x to Windchill PDMLink 9.1 is a logical step for customers who desire expanded data management capabilities both for Pro/ENGINEER and for the broader enterprise. If you have the following requirements, then Windchill PDMLink is most likely the solution for your organization going forward:

• Consolidate disparate CAD product data management (PDM) tools
• Configure, manage and reuse product structures, and associate them with other product content, such as CAD files, ECAD designs, software, documentation, calculations and illustrations
• Leverage product content to develop, configure, manage and publish technical documentation
• Achieve OOTB (out-of-the-box) integrations with SAP* or Oracle*
• Support company initiatives to optimize business processes like change management and manufacturing outsourcing
• Align with company mandates to improve design reuse

For those whose short-term focus is workgroup-level Pro/ENGINEER data management and deployment of new Pro/ENGINEER releases, then updating to Pro/INTRALINK 9.1 is a possibility.

Lastly, Windchill ProductPoint is a potential destination if your requirements are limited to the following:

• Build upon the company’s Microsoft SharePoint strategy
• Manage Pro/ENGINEER and other CAD data (versions, check in/out, lock, release)
• Manage Part libraries and product or project sites
• Collaborate with internal and external teams
• View and Export Reports (Where-used, BOM…)
• Provide access to models and drawings for non-CAD users
• View and markup models in 3D
• Manage engineering calculations

The Functional Comparison table on the next page shows some of the key differences between Pro/INTRALINK 3.x and potential solutions.

Your Future Data Management Solution: How to Get There

Regardless of which application you select, PTC recommends the following actions:

• Understand your company’s long-term vision – Will this solution help your company progress towards its goals?
• Determine the proper level of support you need from a services provider – Maximize the use of internal and external resources.
• Allocate the appropriate number of resources to the project – Skimping on the amount of resources will only lengthen the implementation and increase the risks.
• Ensure resources have the appropriate skills – Training is available from both PTC University as well as authorized providers.
• Assign one person to have overall responsibility for the project’s success – An experienced project manager can effectively identify, communicate, and mitigate risks.
• Set expectations carefully regarding the purpose, strategy, and risks of this project – Nobody likes surprises.

The table on page four summarizes PTC’s recommendations on key transition steps and related resources.

Summary

PTC has a well-defined strategy and a clear, long-term commitment to providing all of our customers with high-quality, high-performance, and fully capable Pro/ENGINEER workgroup data management solutions based on a modern architecture. This architecture provides a solid technical foundation for product enhancements that will carry our products and customers well into the future.

While this is an exciting time for our customers, we recognize that such a transition requires thoughtful planning. The PTC sales, services, and support organizations, along with our certified partners, are prepared to provide you with expert guidance in identifying the most appropriate option for you, as well as assisting you in developing a clear plan that will result in a successful and widely adopted implementation.

For more information about any of these PTC product data management solutions, visit www.ptc.com.
**Functional Comparison**

The following table provides a high-level overview of how each solution compares to Pro/INTRALINK 3.x.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Pro/INTRALINK 3.x</th>
<th>Pro/INTRALINK 9.1</th>
<th>Windchill PDMLink 9.1</th>
<th>Windchill ProductPoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web-based</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>File-based collaboration</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Basic Pro/ENGINEER data management (versions, check in/out, lock)</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Workspace frames</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Integrate multiple changes into one Pro/ENGINEER file</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Create, manage baselines</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Configurable part numbering and versioning</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Multi-CAD file management</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Technical Publications and Illustrations</td>
<td>x</td>
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<tr>
<td>Engineering calculations management</td>
<td>x</td>
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<td>x</td>
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<tr>
<td>Option for single database co-install with Windchill ProjectLink®</td>
<td>x</td>
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<tr>
<td>CAD data exchange across Windchill systems</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x1</td>
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<tr>
<td>Part libraries</td>
<td>x</td>
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<tr>
<td>Reports</td>
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<tr>
<td>Embedded 3D visualization</td>
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<tr>
<td>Configuration management, options/variants</td>
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<tr>
<td>Basic change management</td>
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<td>x1</td>
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<tr>
<td>Advanced, configurable change management</td>
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<tr>
<td>Basic workflow</td>
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<td>x1</td>
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<tr>
<td>Advanced product development workflow</td>
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<tr>
<td>Personal workspace</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Replication</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td>Lifecycle management</td>
<td>x</td>
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<td>Multi-platform support</td>
<td>x</td>
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<td>Simple BOM export</td>
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<tr>
<td>Out-of-the-box integration with SAP/Oracle ERP</td>
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<tr>
<td>Optional ECAD data management</td>
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<tr>
<td>Optional software data management</td>
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<tr>
<td>Optional manufacturing process management</td>
<td>x</td>
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</table>

1 This feature will be available in Windchill ProductPoint 2.0, which is currently planned to be released in mid-2010. The timing of any product release, including any features or functionality, is subject to change at PTC’s discretion.
## Transition Steps and Resources

<table>
<thead>
<tr>
<th>Destination Solution</th>
<th>Key Steps</th>
<th>Resources</th>
<th>Who can help?</th>
</tr>
</thead>
</table>
| **Pro/INTRALINK 9.1** | Strongly recommended that PTC Global Services or a Certified PTC VAR be involved  
1. Determine the ‘to-be’ configuration structure.  
2. Establish a coherent design for any applicable tools and processes.  
3. Identify and resolve any data conflicts that could prevent a successful outcome.  
4. Test migration and analyze results.  
5. Train end-users and system administrators on the new system to help them get acquainted with the new release.  
6. Transition data to the production environment using the validated process and tools. | • Data Migration tool  
• Migration questionnaire  
• Windchill Upgrade and Migration Resource Page: [www.ptc.com/go/windchillupgrade](http://www.ptc.com/go/windchillupgrade) | • PTC Global Services or a Certified PTC partner  
– Time and cost depend upon customer size and complexity  
• PTC University ([www.ptc.com/training](http://www.ptc.com/training))  
– Classroom training offered throughout the world at more than 100 PTC University training facilities  
– Virtual, instructor-led classes offered in both a public and private format  
– Self-paced, web-based courses |
| **Windchill PDMLink 9.1** | Strongly recommended that PTC Global Services or a Certified PTC VAR be involved  
1. Determine the ‘to-be’ configuration structure and what capabilities need to be deployed.  
2. Establish a coherent design for any applicable tools and processes. This could include the transitioning of multiple Pro/INTRALINK 3.x databases.  
3. Identify and resolve any data conflicts that could prevent a successful outcome.  
4. Test migration and analyze results.  
5. Design and execute a training and adoption plan that ensures your people are ready and willing to embrace your new system.  
6. Transition data to the production environment using the validated data processes and tools. | • Data Migration tool  
• Migration questionnaire  
• Windchill Upgrade and Migration Resource Page: [www.ptc.com/go/windchillupgrade](http://www.ptc.com/go/windchillupgrade) | • PTC Global Services or a Certified PTC partner  
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– Self-paced, web-based courses |
| **Windchill ProductPoint** | 1. Determine the “to-be” configuration structure.  
2. Establish a coherent design for any applicable tools and processes.  
3. Determine and resolve, if necessary, any data transition issues.  
4. Test transition and analyze results.  
5. Train end-users and system administrators on the new system to help them get acquainted with the new release.  
6. Transition data to the production environment using the validated processes. | Utilized by PTC Global Services and certified PTC partners:  
• Best practices for manually exporting and saving Pro/INTRALINK 3.4 files  
• Windchill ProductPoint Data Loading Procedure Design  
• Windchill ProductPoint Data Loading Scenarios reference document  
• Windchill ProductPoint Data Loading Considerations (assumptions, risks, etc.) | • PTC Global Services, Certified PTC partner and/or Certified Microsoft® partner  
– Time and cost depend upon customer size and complexity  
• PTC University ([www.ptc.com/training](http://www.ptc.com/training))  
– Classroom training offered throughout the world at more than 100 PTC University training facilities  
– Virtual, instructor-led classes offered in both a public and private format  
– Self-paced, web-based courses |