



PLM Legacy Data Migration

Statement of Work for [Customer]

Between **Integrated Industrial Information, Inc. (I-Cubed)**
And **[Customer]**

 [date]

I-Cubed will not begin performance of this Statement of Work until it receives a binding order from Customer.

Accepted By:

[Customer]

I-Cubed

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Table of Contents

1.0 Overview	3
1.1 Project Scope	3
1.2 Project Assumptions	3
1.3 Data Migration Lab	3
1.4 Definitions	4
1.5 Participant Roles.....	4
1.6 Migration Prerequisites.....	5
2.0 Legacy Data Migration.....	5
2.1 Scoping and Implementation Planning	5
2.2 Installation and Configuration	5
2.3 Testing and Validation.....	6
3.0 User Training.....	6
4.0 Product Support	6
5.0 Exclusions	7
6.0 Change Control.....	7
6.1 Change Control Assumptions	7
6.2 Change Control Procedure.....	8
7.0 Acceptance	8
7.1 Contingencies	8
8.0 Fees and Terms.....	8
Appendix A – Legend Requirements	10
Appendix B – Software	11

Statement of Work

Legacy Data Migration into Windchill PDMLink 8.0 For [Customer]

1.0 Overview

Customer requires the migration of product related data from its legacy systems for use in the PTC Windchill PDMLink 8.0.

This Statement of Work from Integrated Industrial Information (I-Cubed) provided to Customer is for consulting services to develop the initial data migration project plans, migration tool configuration plans, migration validation plans, installation of the Legend for PDMLink software, training the Customer migration team to configure the migration tools, training the Customer migration team to perform the legacy data migrations and to train the Customer migration team to validate the migrations.

1.1 Project Scope

This Statement of Work describes the migration planning and support to be provided to Customer in their efforts to migrate legacy data from existing systems to Windchill PDMLink 8.0 at their sites. The test and production migrations will be performed by the Customer migration team.

The existing data, along with the current locations, are:

- Customer specific information

The following will be provided, with exceptions as noted in following sections of this SOW:

- Pre-Implementation Checklist
- Implementation Summary
 - Configuration Plan
 - Migration Plan
- Validation Plan
- Software and Migration Training (except for existing database export)

1.2 Project Assumptions

- Customer Specific

1.3 Data Migration Lab

The Data Migration Lab is the responsibility of Customer and is included here only as a guideline for a successful data migration.

Unifying data from multiple systems into one PLM environment presents several challenges, naming and numbering standards and variations in engineering practices to name a few. Additionally, data needs to be gathered from the various groups in a controlled manner prior to and during the migration. Setting up a successful data migration requires having the appropriate environment for testing and validating the migration.

The Data Migration Lab will be the heart of the data migration process. Initially, the Data Migration Lab will validate the migration tools and the migration processes.

The Migration Engineer will be responsible for the Data Migration Lab, interacting with the business groups for acquiring the data for migration, performing test, pilot and production migrations.

1.4 Definitions

The following definitions are used throughout this Statement of Work

Legend for PDMLink	Legend for PDMLink is a bulk loading software application. Legend will read legacy CAD Data and design information files, provide data cleansing reports, bulk load files into Windchill PDMLink, and create structure for a variety of CAD systems. More information can be found at www.i-cubed.com .
Data Migration Lab	One or more systems dedicated to testing and implementing the legacy data migration.
Data cleansing	The act of detecting, removing or correcting a database's unintelligible data (i.e., data that is incorrect, out-of-date, redundant, incomplete, or incorrectly formatted), detecting, removing, adding, or modifying application files when said files cannot migrate due to completeness or correctness. The goal of cleansing is not just to clean up the data but also to bring consistency to data merged from separate databases.

1.5 Participant Roles

The following roles are needed to successfully complete this Statement of Work.

VAR Project Manager (optional)	The VAR person with PLM Project responsibilities
Customer Project Manager	The Customer person with data migration project responsibilities.
Windchill System Administrator	The Customer person responsible for the Windchill PDMLink server systems. Knowledge of the Windchill systems and subsystems is essential.
Windchill Business Administrator	The Customer person responsible for the Windchill PDMLink server configuration. Knowledge of the server configuration, including contexts, folders, lifecycles, and attributes is required.
CAD Administrators	The Customer person with knowledge of existing legacy applications.
I-Cubed Product Manager	The I-Cubed manager responsible for the specification of the functions of the CAD Integration. The person will coordinate with VAR and Customer during the specification process prior to development start to ensure required features are included in the CAD Integration.
I-Cubed Project Manager	The Integrated Industrial Information (I-Cubed) manager responsible for the planning and administration of the activities within this Statement of Work.
Implementation Consultant	These consultant may be I-Cubed personnel or a qualified sub-contractor. The Consultant is responsible for defining the implementation summary and delivering the training.

1.6 Migration Prerequisites

The following prerequisites are required for a successful and timely migration. Failure to comply with these prerequisites results in:

- Voided deliverable timelines without changes in payment schedule
 - Lower quality back office support during and after your on-site training
1. Customer to complete and return a signed copy of the Pre-Implementation Checklist.
 2. Customer will provide I-Cubed with any non-default Windchill environment settings for each server Legend is expected to run on. Said environment settings will be delivered to I-Cubed at least 2 weeks prior to any on-site engagement and training. Settings to consider include but are not limited to:
 - a. Revisioning sequence
 - b. Versioning type (i.e. filebased vs properties driven)
 - c. Soft-types
 - d. Desired attribute mappings if known
 - e. Custom lifecycles
 3. Customer will provide I-Cubed with sample data for testing purposes only. Sample data to be delivered to I-Cubed at least 2 weeks prior to any on-site engagement and training. Sample data will include but is not limited to:
 - a. 500-1000 files
 - b. Representative data characteristics (all that apply)
 - i. Family Tables
 - ii. External References
 - iii. Assemblies
 - iv. Parts
 - v. Drawings
 4. No scheduled software, network or server modifications are to be scheduled during the planned on-site engagement.
 5. Client and Server requirements as outlined in Appendix A.

2.0 Legacy Data Migration

This section identifies the work to be provided in preparing for the migration of CAD files from source locations to PDMLink 8.0.

2.1 Scoping and Implementation Planning

Detailed review of the data in its current state and review of the PDMLink configuration requirements are combined to formulate an Implementation Plan. The Legend Consultant along with the Customer migration team will develop a migration strategy that will best meet the requirements of the data migration within the constraints of the overall implementation. Risks will be identified and included in the Implementation Plan.

Time: 2.5 days on-site
Date: TBD
Resources: VAR Project Manager, Customer Project Manager, Implementation Consultant,
Deliverable: Migration Plan

2.2 Installation and Configuration

A configuration plan will be developed and implemented to run Legend. The setup will include, but may not be limited to:

- Define Folder Mapping
- Define Attribute Mapping

Proper installation includes installing Legend for PDMLink and verifying installation with the loading of known test data. Said test data is removed from Windchill PDMLink following the installation verification.

Configuration includes the setup and configuration of Legend for PDMLink. It does not include the customization required for handling unique data conditions at Customer Site. Verifying the configuration involves several iterations of test runs using Customer data, verifying the information in Windchill PDMLink and verifying its compatibility with the appropriate Workgroup Manager.

Time: 2 days on-site
Date: TBD [required to be consecutive with section 2.1]
Resource: Migration Engineer, Implementation Consultant, Windchill Business Administrator
Deliverable: Configuration Plan, Installation of Legend for PDMLink

2.3 Testing and Validation

Test the migration process in Customer environment using pilot data. A broad set of Customer data should be used to validate the migration against the expected breadth of data conditions. Configuration and customization changes will be recommended. At the end of this period, a Legend Migration Guide describing the configuration, customization, and migration process specific to Customer will be delivered. This Migration Guide will also contain a set of Legend best practices and troubleshooting information.

Time: 4.5 days
Date: TBD
Resource: CAD Administrator, Migration Engineer, Migration Consultant
Deliverable: Validation Plan, Implementation Summary

3.0 User Training

The Implementation Consultant will provide interactive hands-on training throughout all activities outlined in Section 2. The provided training will include:

- the overall Legend process
- Legend installation
- Legend configuration
- Legend usage
- Legend troubleshooting
- Legend customer support process
- Migration planning

The Implementation Consultant will provide further training in the following areas only if Customer's migration processes require the training:

- Legend customization through user exits

Resource: CAD Administrator, Migration Engineer, Implementation Consultant
Deliverable: Software and Migration Training

4.0 Product Support

Legend product support will be provided per Customer's purchase agreement. This support will be conducted via phone and e-mail unless time is set aside in the Project Plan for on-site support during the test or production migration phases.

Resources: Migration Engineer, Implementation Consultant
Deliverable: Additional Support

5.0 Exclusions

These items are excluded from this Statement of Work:

DB export	Exporting of content and metadata for migration is not included.
Data Cleansing	Data cleansing is excluded. All cleansing of data is the responsibility of Customer. Guidelines and reports will be produced, as described in previous sections which can be used by Customer to identify and correct data, as required.
Data Migration	The actual migration of data, both test rehearsal and production, is the responsibility of Customer. Pilot tests will be included to validate the Configuration and Migration Plans.
Legend Customization	<p>There is one main customization routine, the Metadata Customizer. This routine manipulates specific data requirements such as mapping of revision sequences and determination of part numbers. Example routines are used as part of the legend training, but Customer handles final customization.</p> <p>A second customization routine that is used when multiple versions of files are loaded and As-Stored configurations are maintained by PDMLink. This customization is the Revision Mapper. It must be noted that migrating legacy data for As-Stored configurations is a very complex migration and will increase the time and efforts required for a successful migration.</p> <p>Migration of As-Stored configurations and file history are not supported by this SOW.</p>
Network Configuration	It is expected that the network environment between the Legend clients and the Windchill server fulfill the requirements in Section 1.6. Configuring the network to meet said requirements is excluded here. Consulting time lost due to network configurations that do not meet our prerequisites is at the expense of Customer.

6.0 Change Control

Products and Services to be delivered by I-Cubed outside the scope of this Statement of Work will be addressed through a Change Order as described below.

In the event that any proposed modifications to this SOW constitute material changes to Services or Product Deliverables scope, functionality, or responsibility, the provisions for project change shall apply as described in this Change Control Procedure. Evaluation and or implementation of requested changes might result in modification to price, schedule, or other terms of this agreement. Any such changes (for example, scope changes) will not be incorporated into this document without the joint agreement in writing of both Customer and I-Cubed. Once agreement has been achieved, the document will be updated in writing and a revision provided and stored as defined in the Change Control Procedure.

6.1 Change Control Assumptions

The Change Control Procedure is documented below. The following assumptions apply:

- Any modification to or deviation from the agreed scope, or changes to the time or costs agreed to in this SOW, will be subject to this Change Procedure.

- Customer or I-Cubed may initiate change requests whenever there is a perceived need for a change that will affect the contract of work, such as schedules, functionality, or cost. Any changes of scope initiated from the end customer that invoke this Change Process must be brought to I-Cubed by Customer.

6.2 Change Control Procedure

- A change can be identified to both the I-Cubed Project Manager and the Customer Project Manager by a resolved problem or issue, document, conversation, or other form of communication.
- The I-Cubed Project Manager will:
 - Receive a completed change request form from the party requesting the change.
 - Investigate the impact of the proposed change to schedules, functionality, or cost.
 - Evaluate the impact of not performing the change.
 - Prepare a response to the proposed change.
 - If in agreement that the change should be performed, obtain authorizing signatures the change request form.
 - If the change is not agreed to:
 - The I-Cubed Project Manager will discuss and document the objection with Customer.
 - The proposed change will be re-negotiated if possible, or withdrawn if it is agreed to be non-essential. In such a case, the reasons will be documented on the change request form.
- Once the change request form has been signed, then work may be scheduled, or rescheduled as necessary, to begin. If the change requires additional funding, Customer must issue a PO number before changes can begin.
- The I-Cubed Project Manager will adapt project plans to incorporate agreed changes and present them at progress meetings for approval.
- Both I-Cubed Project Manager and Customer Project Manager must sign the SCF once the change has been completed.

7.0 Acceptance

Customer acceptance is assumed at the end of the on-site consulting. If Customer wishes to delay customer acceptance, Customer must provide I-Cubed with a written description of why Customer wishes to delay customer acceptance. The written description must include:

- The deliverables in this Statement of Work that Customer feels are unfulfilled.
- For what reasons Customer feels these deliverables are unfulfilled.
- What actions Customer expects of I-Cubed to complete any tasks Customer feels are incomplete.

The I-Cubed Project manager will:

- Review the Customer Acceptance fulfillment request.
- Come to an agreement with Customer as to how to go forward.
- Provide a Customer Acceptance Resolution document to be signed by Customer and I-Cubed.

Once the Customer Acceptance Resolution document has been signed, the work will be completed per the Customer Acceptance Resolution document.

7.1 Contingencies

Changes to this Statement of Work will be addressed on a time and material basis.

8.0 Fees and Terms

I-Cubed will provide the software and services outlined in this Statement of Work to Customer with the payment deliverables as defined below.

Software delivery is defined by delivering a valid hyperlink to download Legend software and a valid order id to Customer.

Software Delivery \$ Software amount detailed in quote
Customer Acceptance \$ Professional Services amount detailed in quote

Appendix A – Legend Requirements

Prerequisites:

- PDMLink Quick Start completed
- Legend Client Requirements (multiple clients are recommended)
 - Windows 2000 or XP
 - Administrator level access
 - 1 GB RAM
 - 500 MB of free disk space
 - Internet Explorer 6.0
 - Internet access
 - www.i-cubedcart.com (port 80)
 - legend-license.i-cubed.com:8080
 - Direct RMI and HTTP access to PDMLink server
 - Any type of Proxy connection to the server is not supported
 - HTTPS is not supported
 - RMI Tunneling is not supported
- Server Requirements
 - Windchill PDMLink 8.0 upgraded to M20
 - Foreground and background MethodServers such that there is at least one foreground MethodServer for every two Legend clients.
 - Oracle and Windchill Tunning for optimal performance
 - All non-default settings to be delivered to I-Cubed
- Visual Basic 6 development platform, for user exits

Appendix B – Software

Product - Module	Description
Customer Specific	