Highstage

WHITE PAPER

Migration from Agile PLM to Highstage

A comprehensive process

How one spinoff manufacturer moved off Oracle Agile PLM in a single weekend — and what it learned along the way.

1 Introduction

Product lifecycle management (PLM) systems are essential tools for companies managing complex product data, processes, and business operations. In today's fast-paced business environment, organizations are constantly seeking more efficient and user-friendly solutions to enhance their operations.

This document details the process one of Highstage's customers underwent to migrate from Oracle Agile PLM to Highstage, driven by a need for greater functionality and ease of use. The company, a spinoff from a larger international corporation, successfully completed this migration while overcoming challenges such as data accessibility, the need for manual data cleaning, and ensuring minimal disruption to ongoing business activities.

The story may serve as inspiration for companies which are forced to change from Oracle Agile PLM, as Oracle has published its End-Of-Life strategy for Agile PLM.

> **Oracle has published its End-Of-Life strategy for Agile PLM. For many companies, the question is no longer whether to move, but how.**

1 weekend

Total system downtime during switch-over

30 hours

To develop the custom C# import script

15,600

Records migrated into Highstage

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3 Background

The company in question originated as a spinoff from a larger corporation. This context is crucial, as it influenced the complexity of the migration process. Many spinoff companies face challenges in terms of data ownership, access, and separation from parent companies. In this case, key personnel in the new company had previous experience working with Highstage, a cloud-based PLM solution, through another organization. This familiarity with Highstage's capabilities, alongside its flexibility and enhanced user interface, motivated the decision to migrate away from Agile PLM.

Agile PLM had served the company well during its tenure under the parent corporation, but as the new entity emerged, it became clear that Highstage offered distinct advantages that could help streamline operations and actually become a more agile organization. The decision to migrate was rooted in the desire for improved documentation, broader engagement from employees, and a more efficient PLM system.

THE STARTING POINT

Where the data lived

Inside the parent corporation's Agile PLM instance, interwoven with other businesses still relying on the system.

What had to move

The most recent revision of every item, plus documents and references. Historical revisions and ECOs were left behind by choice.

4 Rationale for Migration

The rationale for migrating to Highstage was multifaceted. While Agile PLM had been effective, there were several areas where Highstage offered significant improvements:

5 Challenges Encountered

While the decision to migrate to Highstage was clear, the execution presented several challenges:

01

Data Accessibility

Since the company's data was interwoven with the parent corporation's data in Agile PLM, it was not possible for Highstage consultants to gain direct access. The data was mixed with other businesses that were still relying on Agile PLM, making extraction and separation difficult.

02

Data Standardization

Agile PLM had been used inconsistently, particularly when it came to item types and documentation. This lack of standardization created difficulties when transferring data to Highstage, as there were discrepancies in how data was labeled and categorized.

03

Excluding Non-Essential Data

The company decided to only migrate the most recent revision of items, excluding historical data and Engineering Change Orders (ECOs). This decision required careful planning to ensure that no important information was lost during the migration process.

6 The Migration Process

The migration process went through several major phases.

PHASE 1 · 6.1

Preparations

Export, exclusion decisions, cleaning, import methodology, and both migration and validation planning.

PHASE 2 · 6.2

Data import

Agile locked, final export taken, data imported into Highstage, then validated against the agreed test protocol.

PHASE 3 · 6.3

Switch-over and GoLive

Highstage put into production and opened to all users.

6.1 Preparations

The preparation phase is key in any migration project. One needs to evaluate the complexity, consistency and quality of the data, and plan accordingly.

6.1.1 Data Export

Due to the complexities associated with accessing the company's data within Agile PLM, consultants from Agile were enlisted to export the company's PLM data into Excel spreadsheets and attachment files. These files were then stored on a shared folder for easy access by the migration team. This approach allowed the company to control which data was transferred and how it would be prepared for migration to Highstage.

6.1.2 Excluding Historical Data

As previously mentioned, the company opted not to migrate historical revisions of items or ECOs. This decision simplified the migration process but also necessitated close scrutiny of the exported data to ensure that only the most recent and relevant revisions were included. The choice to exclude this data was driven by a desire to focus on the company's present and future needs, rather than being bogged down by past revisions that were no longer useful.

6.1.3 Data Cleaning and Preparation

Once the data was exported, it had to undergo a manual cleaning process in Excel. The quality of the exported data varied, requiring the migration team to identify and resolve inconsistencies. For example, Agile PLM had not been consistent in categorizing item types, so additional columns were added to the Excel file to indicate which items should be imported into Highstage and to clarify item types.

This step was critical for ensuring that the migration process was smooth and that the data imported into Highstage would be usable and well-organized. The manual cleaning process involved careful attention to detail, with each item being reviewed to ensure it met the necessary criteria for import. It is important to select resources who understand both the Agile system, and the working methods of the company.

Highstage was also set up to store essential source data for traceability back to the Agile PLM, such as the original Agile ID number and Agile lifecycle phase. This ensured that even though the company was moving to a new system, there would be continuity and traceability, allowing employees to reference historical data when needed.

6.1.4 Import Methodology – Custom C# script

To facilitate the migration process, Highstage consultants created a custom C# script. This script automated many of the import tasks, saving time and ensuring consistency in the migration. The development of the script took approximately 30 work hours, a relatively short period given the scope of the migration (note that the number of hours can vary, depending on the quality of, and access to, the data). The script proved to be a crucial component of the migration process, streamlining data import into Highstage and reducing the risk of human error.

6.1.5 Planning for the migration

The actual migration was planned carefully. No one must work in the system during migration, and all users were informed that the Agile PLM was closing down for an entire weekend at a specific date. The Highstage team was working on-premise, together with key personnel from the company.

During that weekend, it is important to have planned for many scenarios. Therefore, make sure

- IT experts are available
- No other maintenance is planned for that weekend
- Alarm system or door locks doesn't make problems at night
- etc.

In addition, users were trained in advance, and they had a sandbox Highstage system available well before the migration, to enable testing and familiarization with Highstage prior to the migration.

6.1.6 Validation planning

A crucial part of the planning is to define the scope and extent of testing/validation of the migrated data. It was crucial to perform a representative number of tests on the imported data, and a comprehensive test protocol must be developed and agreed prior to the migration. It must also be ensured that competent personnel, who are familiar with the data, are available to perform testing after migration.

6.2 Data import

When the time of migration occurs, it is important that the data stays stable. Therefore, access to Oracle Agile PLM was immediately blocked for all users prior to any work could commence.



6.2.1 The final export

Now the final export of the data set was done, into the formats already adapted and tested for the import job. Assuming that the data quality was fixed in the old system, the number of inconsistencies in the exported data could only originate from the last days of using Agile PLM. If they occurred, they had to be corrected in the exported data set.

> Access to Oracle Agile PLM was blocked for all users before any work could commence. Stable data is the precondition for a clean import.

6.2.2 Data import into Highstage

Once the data was cleaned and prepared, it was imported into Highstage. This process involved the migration of approximately:



The data import process was largely successful, but certain challenges remained, particularly with file attachments. The quality of the attachment files in Agile was not up to the company's standards, requiring manual effort to transfer these files to Highstage. This manual import process ensured that only the most relevant and useful attachments were transferred, maintaining the integrity of the company's documentation.

During the migration process, Agile remained in use by a small number of employees who continued to update the system. This required more than one data export to ensure that the final transfer to Highstage was comprehensive and up-to-date. Despite this, the migration process experienced minimal data loss, and the transition was seamless for the majority of employees.

6.2.3 Validation

To ensure that the import and migration was successful, it was crucial to perform a representative number of tests of the imported data. To validate the entire imported data set was impossible, but one needs to make a plan for test and validation that covers all types of data.

6.3 Switch-over and GoLive

When the migration was validated and all parties were satisfied, it is time to put the new Highstage system into production and make it available and accessible to all users.

7 Post-Migration Success

After the final data import was completed, the company fully transitioned to Highstage. Employees who had previously worked with Agile PLM adapted quickly to the new system, thanks in large part to Highstage's intuitive functionality.

The company reported broader engagement in documentation tasks across the organization, with employees more actively participating in the management of product data and documentation.

The migration was deemed a success, not only because the company could seamlessly transition from Agile PLM to Highstage but also because it resulted in improved processes and efficiencies. Employees found the new system to be more accessible and user-friendly, which in turn increased their willingness to engage with it. Highstage's collaborative features also enhanced communication and coordination across different departments, allowing for better workflow and more timely documentation.

> **The migration experienced minimal data loss, and the transition was seamless for the majority of employees.**

8 Lessons learned and considerations for your migration project

The migration from Agile PLM to Highstage provided several key lessons for the company, which could be valuable for other organizations considering a similar transition:

Data Preparation is Key

One of the most time-consuming aspects of the migration was the preparation and cleaning of data. Ensuring that data is well-organized and consistent before migrating it to a new system is essential for a smooth transition.

Manual Effort Can't Always Be Avoided

While automation scripts like the custom C# import script will save significant time if volumes are high, some aspects of the migration process, such as file attachment imports, may still require manual intervention.

Clear Communication is Crucial

Throughout the migration, it was important to maintain clear communication between the company, Agile consultants, and Highstage consultants. This ensured that everyone was aligned and working towards the same goals.

Embrace New Features

The migration offered the company an opportunity to embrace the new features offered by Highstage, such as its enhanced collaboration tools. By taking full advantage of these features, the company was able to improve its internal processes and communication.

9 Conclusion

The migration from Agile PLM to Highstage was a strategic move that helped the company streamline its product lifecycle management processes and adapt to the demands of a growing, independent organization. The process, while not without its challenges, ultimately resulted in a more efficient and user-friendly system that has increased employee engagement and improved overall productivity.

This successful migration underscores the importance of careful planning, data preparation, and the use of automated tools when transitioning to a new PLM system. For companies looking to make a similar switch, the experience of this company offers valuable insights into how to navigate the process effectively while minimizing disruption to day-to-day operations.

The key takeaway is that with the right preparation and support, migrating to a new PLM system like Highstage can lead to significant long-term benefits for both employees and the organization as a whole. This can be done with limited costs and resources, and without losing productivity.

THE KEY TAKEAWAY

With the right preparation and support, migrating to a new PLM system can be done with limited costs and resources — and without losing productivity.

Peace of mind for product companies

Facing the end of life of Agile PLM? We will walk you through what a migration would look like for your data, your team, and your timeline.

Talk to us →

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