WorkGroup PDM announcement

The official decree came from SOLIDWORKS on July 1, 2015... the long anticipated announcement that Workgroup PDM is at end-of-life. In the SOLIDWORKS community this has generally not come as a surprise, given that premature rumors of Workgroup’s imminent departure have circulated for years. It’s generally well known however that development of this product has been at a standstill for many release cycles, with the last major ‘upgrade’ being simply to make Workgroup compatible with 64 bit systems. Workgroup has been showing its age for some time now, mostly stemming from fundamental limitations in its base architecture that can’t be remedied.

Time line

While this will deeply affect many SOLIDWORKS customers, the good news is that the time line proposed by SOLIDWORKS for this transition has been very thoughtful and should give everyone plenty of time to come up with a game plan for moving forward. As of January 2016, we still have 2 full years to plan and transition away from Workgroup. Here’s the Breakdown:

- SOLIDWORKS 2016: WorkGroup PDM will still install/upgrade as usual for all service packs.
- SOLIDWORKS 2017: WorkGroup PDM will still install/upgrade as usual for existing customers for all service packs. Installation/Upgrade will be accompanied by an end-of-life warning. Workgroup will not be available to new customers.
- SOLIDWORKS 2018: WorkGroup PDM will no longer install/upgrade or be supported for either new or existing customers.

PDM Standard

Along with the end of life announcement for WorkGroup PDM, SOLIDWORKS has also developed and announced a new PDM tool called PDM Standard that is intended to replace WorkGroup as the ‘bundled’ PDM tool included ‘standard’ with SOLIDWORKS Professional and Premium CAD licensing. PDM Standard is not a facelift or re-tooling of Workgroup, but is of an entirely different lineage and architecture. PDM Standard is based off the same platform as its big-brother system PDM Professional (formerly known as Enterprise PDM). Unlike Workgroup, PDM Standard uses a Microsoft SQL back-end instead of the flat-file pseudo database used by Workgroup. PDM standard is a much more powerful and robust tool than Workgroup in many respects.

Implications of Architectural differences (Pros and Cons).

In the ‘pros’ column: scalability and performance are the key factors behind this phase out and transition away from Workgroup. PDM Standard, unlike Workgroup, has an actual relational database (SQL) on the back end, which is vastly more capable and flexible than the Workgroup counterpart. For scalability and organizational growth, it’s directly because PDM Standard is not based on Workgroup, but rather on the PDM Professional platform, that it is able to directly upgrade and convert (seamlessly) into its more powerful parent system (PDM Professional).
other words, unlike WorkGroup, PDM Standard is built from the group up to be scalable and upgradable.

In the ‘cons’ column: this architectural difference (while in the long run a huge win for everyone) is also at the heart of what is going to be a pain point in the short term for making the transition away from workgroup. It’s because Workgroup and PDM Standard are based on completely different architectures that there is no direct upgrade path between the two, meaning it’s not possible to directly convert one into the other. There’s no ‘Easy Button’ upgrade available. Fundamentally, this is an apples and oranges type of comparison where these systems are too fundamentally different to allow a direct translation or upgrade path between them. Since one system cannot be turned into the other via a software upgrade, this means that PDM Standard must be separately set up and configured in parallel (permissions, workflow, properties etc...) and then the vault data (both file and metadata) must be transferred over as part of a data migration process.

Data Migration options

To translate Workgroup data into either a PDM Standard or PDM Professional vault requires a Data Migration: Data Migration being a process by which both files and metadata are transferred from one system to another. In general, there are a few options up front to consider when contemplating a data migration from a revision managed system such as Workgroup. The first is how much historical data is needed in the new system: full History or Latest Revision Only? This is a judgment call about how much data from the old system is desired to be transferred to the new system. Will PDM standard users need only the latest revisions or is the full revision history from Workgroup desired to be accessible moving forward. Beyond full history or latest, is also a question simply as to how much of the overall data set is needed moving forward. For example should only current/active projects be transferred, or rather all project data both active and inactive? Many Workgroup vaults contain large amounts of archived/obsolete data that is no longer used even within Workgroup.

Latest-only Migration:
For a latest revision only migration from WorkGroup, in many cases, this can be done as an in-house ‘manual’ process involving check-out of the desired files from workgroup and then copy/pasting this data to the PDM Standard vault (a plain ol’ windows copy/paste). On the PDM Standard side would follow check-in and the setting of revisions. This data transfer process is of course a bit of an over simplification, but for many workgroup vaults this will be a relatively straightforward and simple process to transfer latest file revisions. There are however a number of variables relative to the size of the Workgroup vault, and the configuration settings employed that may complicate this, or even make a manual import impractical or impossible. Another option for latest-only migration is to work with your SOLIDWORKS reseller (GoEngineer) on a professional services basis to perform a latest-only migration as a professional service. GoEngineer can programmatically transfer both Workgroup file and metadata to both PDM Standard and PDM Professional vaults. In many cases GoEngineer can transfer data as a turn-key solution in situations where circumstances and/or logistics prevent manual transfer, while at the same time alleviating the time based costs associated with tasking.
an in-house engineering team move their own data across. For further information on professional services please refer to the contact information below for consultation or request for quote (RFQ).

Full History Migration:
In circumstances where the need exists to migrate all the revision history from Workgroup to either PDM Standard or PDM Professional, there is only one option in this regard which is to explore a Professional Services level data migration. Currently, because of the complexity of this migration process there is no customer facing toolset available to perform in-house migrations. This is a complex process that ultimately re-creates the revision layer deposition from Workgroup and transfers that history layer by layer to the new PDM database. Through this method, all the down-rev file versions are made accessible for each file (in addition to latest). In most cases the results are predictable and reliable. In some instances however, especially where the Workgroup revision schemas have been configured using non-standard methods, and/or especially if the revision schema has been changed over time, the full history migration process can face additional challenges and even necessitate vault-specific customized scripting and post processing measures. When contemplating a Full history migration a good first step is to schedule a professional consultation with a GoEngineer PDM specialist in order to discuss the various options and scope out the project. We’ll be able to analyze the situation and provide a tailored recommendation for the best transition option for your organization. For further information on professional services please refer to the contact information below for consultation or request for quote (RFQ).

Archiving Workgroup PDM (long term storage)
Whether you decide to go with a Latest-only, or Full History approach to migration: as an additional step it is recommended to implement a strategy to permanently archive a functional copy the Workgroup vault environment. Because Workgroup will no longer upgrade after SOLIDWORKS 2017, and because operating system environments will continuing to evolve, simply archiving the raw vault data will not be useful in the future as there will be no way to access, what will by then be very old software on modern equipment. This is one of the primary obstacles that are overcome by the use of virtual machines. Therefore using a virtualization method to archive workgroup can facilitate keeping this system available and functional (at least within the VM) indefinitely, or as long as may be necessary. This process entails creating a virtual machine in a currently supported operating system, and installing and transferring the Workgroup vault and a SOLIDWORKS CAD installation to a virtual environment. This creates a contained functional system with live installations of all the necessary software to access the vault normally. This environment can then be turned off and archived safely for long term storage. At any future point, if an old workgroup vault ever needed to be referenced, or engineers needed the occasional older revision pulled out, the virtual machine can be turned on and the vault accessed on demand. In many cases having this option has allowed many companies to re-think the necessity of undergoing the expense and hassle of a full history data migration. In other words, the thought is: why needlessly clutter and over complicate the new PDM system with loads of historical data... especially if this data will be seldom, if ever, used or
needed. With an intact Workgroup system safely stored away in a virtualized environment, it can be turned on and accessed whenever the need arises. This is a nice backup strategy even when executing full history migrations.

**Contact info for additional questions:**
Please contact your GoEngineer PDM Professional services team for more information and consultation on tailoring a plan for Workgroup PDM transitions.

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