

## Checklist for Upgrading to PTC Windchill 11

Once your company has made the decision to upgrade to PTC Windchill 11, you can count on **PTC Global Support** to help you streamline the upgrade process. To ensure a seamless transition we've prepared a Knowledgebase article in the PTC eSupport Portal that walks you through the process with helpful links to technical articles and resources. Below is a checklist summary of that process.

For complete upgrade direction, please read the Knowledgebase article here: [PTC.com/go/upgradewindchill](https://www.ptc.com/go/upgradewindchill).

Use the checklist below to make sure that your upgrade goes smoothly:

### Plan for Your Upgrade to PTC Windchill 11

- Create a team that possesses the required set of skills
- Ensure source and target versions are compatible – check the Supported Upgrade Path and download any Upgrade Patches for your versions
- Ensure OS and third party software is supported, and obtain the required software needed for the target system – check the Windchill Software Matrix
- Obtain the required hardware necessary to run rehearsal and production upgrades
- Review PTC Documentation –including the upgrade planning guide, Windchill Upgrade Guide, Windchill Upgrade Reference Guide, and review Technical Support articles
- Run the mandatory upgrade WinDU tasks and resolve issues
- Note any software issues reported in your current release that are now resolved
- Create a detailed upgrade project plan
- Schedule an optimal time for the rehearsal upgrade runs and, once successful, for the production run
- Connect your environment to the Performance Advisor for PTC Windchill

### Test Before You Go Live

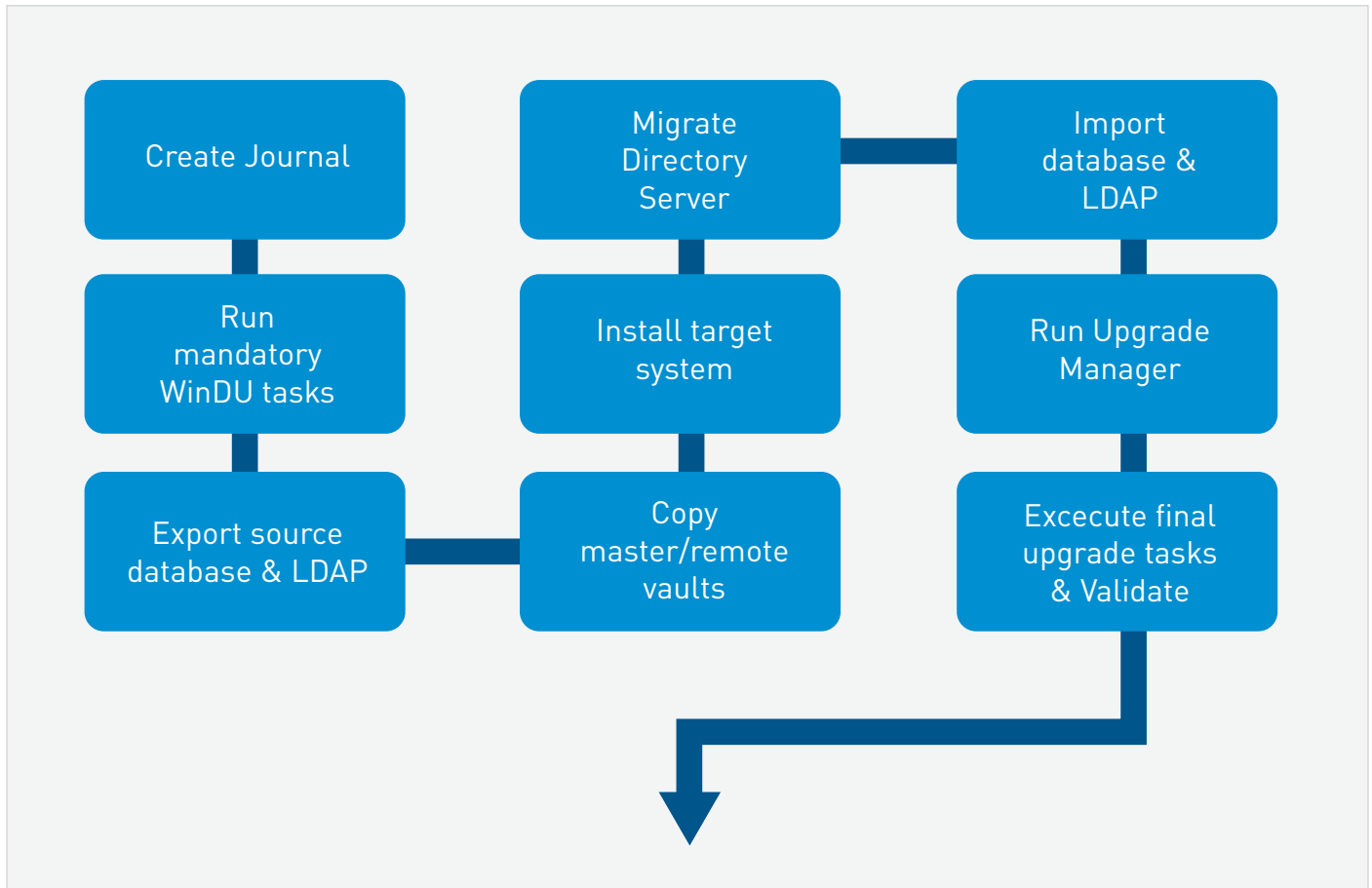
- Refer to the “Upgrade Planning Guide”
- Perform functional and data verification testing
- Receive proactive alerts, tips, and make requests
- Review Technical Support articles
- Resolve technical issues before you go live
- Track all of your upgrade activity
- Validate Performance Advisor dashboard results

### Go Live

- Monitor and resolve technical issues
- Receive proactive alerts, tips, and make support requests as necessary

## Upgrade Process Overview

Ease your upgrade with a comprehensive process designed for a successful implementation.



## Admin and User Training

The ultimate success of the upgrade is administrative knowledge and end user adoption of the new features. PTC provide several ways to enhance both admin and end users skills:

- PTC Windchill [Help Center](#)
  - [Read this First](#) document
  - What's New document and Enhancement Details documents available [here](#)
  - [Instructor led](#) training
  - [Web based training](#)
  - [PTC Community](#)
  - Support Services training (e.g., [Performance Advisor](#))
- **To learn more about the new features and functionality in PTC Windchill 11, please visit the product page here: [PTC.com/go/windchill11](https://www.ptc.com/go/windchill11)**

