Migration Capabilities
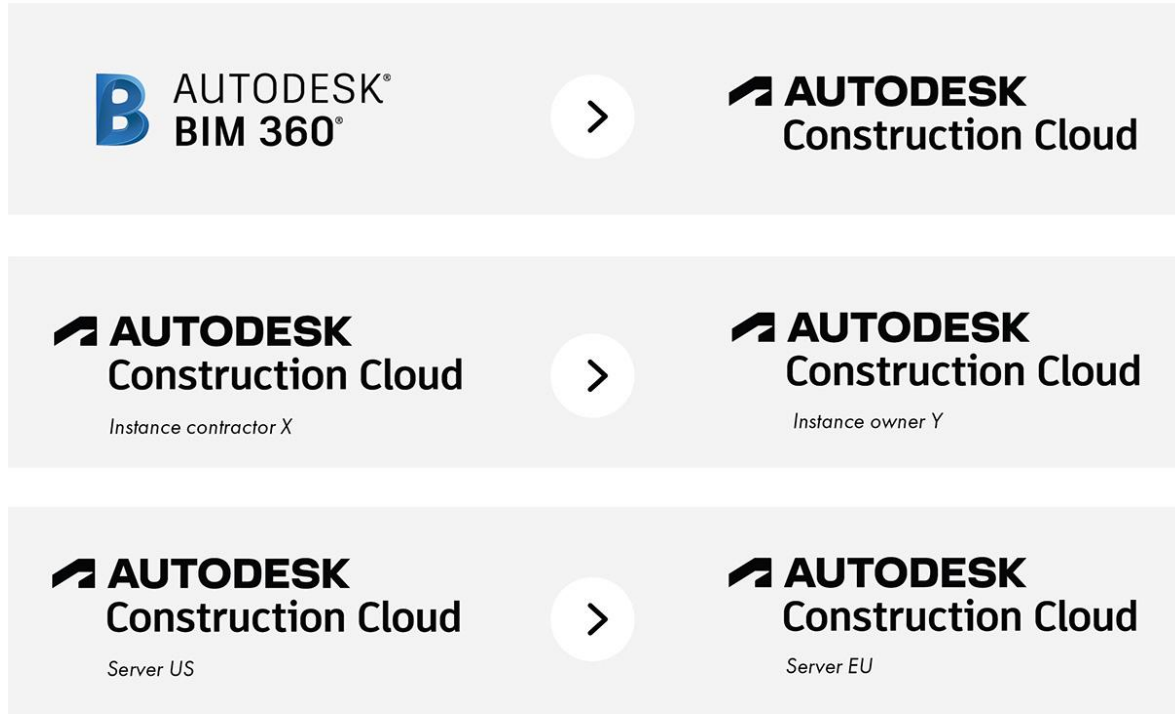
This document is under constant development and is intended to facilitate a first assessment of migration capabilities. Please consult Cadac for the latest state of technology, analysis options and tailored migration proposal.

Regarding these use case the following features are supported:

Core Elements

Folders

- Folder Name
- Created User
- Permissions

Items

- Created User
- File Versions
- File Name
- Description
- All Extension Types
- Custom Attributes

Cadac. Enabling digital.

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- Cross-References/Linked Files
    - AutoCAD files, incl Civil3D

    Possible upgrade

    - *Revit files*

        If Revit files are to be shared as Cloud Workshared then we will use Design Automation tools & use of FlexTokens. The creation of these shared Revit files can only be automated for the latest version of that file.
- PDFs
    - Standard Files

    Possible upgrade: Flatten Markups as non-editable features in PDF, for files in Plans folder

Issues

- Basic Properties
    - Name
    - Description
    - Type
    - Status
    - Assigned To
    - Due Date
    - Start Date
    - Location

    Possible upgrade: Advanced Features

    - *Publishing Status*
    - *Permitted Actions*
    - *Watchers*
    - *References*

Forms

- Creating Form (Possible upgrade)
    - The company, role, or user assigned to the form. Note: the assignee must be a contributor of the template.
    - The Template the form is based on
    - Text for the form description field.
    - The name of the form instance
    - Date the form pertains to, must be after 1950-01-01.
    - Location associated with the Form
    - Text for the form's notes section.
    - Max length: 8000
    - Date and time indicating when form was created on the client or external system (optional).

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- The current status of the form. Note that forms are created in draft status. Possible values:
  - draft: you can edit forms.
  - inReview: you cannot edit forms, however, they can be approved by form reviewers.
  - submitted: forms are closed and no longer editable.
  - archived forms are not editable and hidden in the UI.
- Signature of the reviewer who is submitting the form (should be included when submitting an inReview form) as a base64 encoded SVG.
  - Note: the SVG will be sanitized: tags and attributes are limited to the basics (<path>, <g>, <polyline>, etc) needed to represent a signature.
- Updates a form's main form fields, both tabular and non-tabular.
  - Note that we do not support updating PDF forms.

Users
- Basic Information
  - Name
  - Email
  - Company
- Access Control
  - Access Levels

    Possible upgrade: Automation of the manual migration of Roles.

Companies
- Core Details
  - Name
  - Trade
  - Contact Information
    - Address
    - Phone
    - Website
  - Description
- Business Identifiers
  - ERP ID
  - Tax ID

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Possible upgrades

Based on joint analysis and tests

- Assets
- RFIs
- Sheets
- Forms
- Workflows
- Relationships

Limitations

Options to migrate the following data is based on mutual agreement

Forms
- Templates
- PDF forms

Issues
- Issue Templates
- Attachments
- Pin-Pointed issues

Workflows
- Cannot be automatically migrated
- Manual migration may be possible
- Additional planning required for workflow transitions

Design Collaboration
- Cannot be automatically migrated
- Manual migration may be possible
- Additional planning required for Design Collaboration transitions

Reviews
- Cannot be automatically migrated
- Options to be verified

Markups
- Cannot be automatically migrated
- Options to be verified

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Limitations and Disclaimers

Evolving Nature

This document is subject to continuous review and refinement. The information presented represents the current state of understanding and is not static.

No Guaranteed Outcomes

The contents herein do not constitute:

- A definitive statement of migration capabilities
- A commitment to specific migration results
- A comprehensive migration strategy

Recommended Action

For:

- Current technological capabilities
- Detailed migration analysis options
- Customized migration proposals

Clients are strongly advised to consult directly with Cadac representatives to obtain the most up-to-date and tailored information.

Disclaimer of Liability

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Contact

For the most recent and precise information, please contact Cadac Group directly.

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