

AutoCAD to MicroStation Migration Checklist

Purpose: *In addition to installing MicroStation software, there are migration options and tasks that need to be considered. This detailed checklist is used to collect the information necessary to identify and execute the selected tasks that will be required to upgrade your environment to MicroStation. It is intended to be completed by the end-user or a Bentley Services Consultant, depending upon who is performing the upgrade.*

Account: _____

Primary Contact: _____

E-mail: _____

Phone: _____

Mobile: _____

Organizational Considerations:

1. How many seats are involved?	
2. What products are involved?	
3. What is the timeframe?	
4. Who are the stakeholders?	
5. Is there a CAD manager?	
6. Will the IT department manage the deployment?	
7. Is there an external business partner/consultant who will be involved?	
8. Are there any business issues that need to be addressed before proceeding with an upgrade?	

3rd Party Software

Is the client using 3rd party software with their production and design applications? Yes No
List/identify the dependencies on specific versions of a design or production applications.

3 rd Party software	Migration path/version	Time frame

Operating Environment

OS

MicroStation CONNECT Edition requires a 64-bit OS.

Check all that apply

- Windows XP
- Windows 7 (32)
- Windows 7 (64)
- Windows 8
- Windows 10
- Modified/Secure OS (*Often seen in Military/Government installations*)
- Other _____

Network

Some features require internet access.

Check all that apply

- LAN
- WAN
- Internet Access
- Limited Internet access
- No Internet access
- Isolated Network
- Stand-alone machines

Workflows, Configurations & Customizations

Customized Workflows

List the CAD workflows and customizations that are in use. Consider corporate, department, client and project workflows that are supported by separate standards, CAD interfaces or workspaces.

Many workflows, customizations and operations are tied to legacy features or the lack thereof. Users often create menus, software, and user commands that provide functionality not directly addressed by previous versions of MicroStation.

During the upgrade process, it is critical to collect and examine user customizations (procedures, workspaces, standards and related resources) and determine which ones have been superseded by new technology and can be safely abandoned and which ones need to be brought forward or modified.

Example: Attach and reopen raster file after moving to new directory

Standards

Is an externally published CAD standard being used?

If so, what standard(s)? _____

- Obtain a copy of the documented CAD standards and related procedures.
- Collect template and library files containing items such as styles, layers and symbology which are detailed below under "Resources"
- Text** styles and **Dimension** styles:
There may be numerous text and dimension styles for work done at different scales. Many of these styles may be replaced by implementing annotation scale. If dgnlib files are not available, secure sample files or other documentation. (See "Resources" below)
- Collect documentation regarding **file naming** and **reference file** practice.
- Collect information about the use of **metadata**.

Resources

Obtain copies of resource files for customized *menus tools and functionality*. *Note there may be multiple versions of these files if the account is working with different projects. For each project, the files should be evaluated.*

<u>Item</u>	<u>Files/Comments</u>
<input type="checkbox"/> Custom menus	_____
<input type="checkbox"/> Layer definitions	_____
<input type="checkbox"/> Text styles	_____
<input type="checkbox"/> Dimension styles	_____
<input type="checkbox"/> Multi-line styles	_____
<input type="checkbox"/> Custom line styles	_____
<input type="checkbox"/> Custom pattern files	_____
<input type="checkbox"/> Materials	_____
<input type="checkbox"/> Metadata conventions	_____

- Obtain copies of all Template (.dwt) files.**

Be sure to review:

- Working units
- Angular units
- Geographic Coordinate Systems
- Use of Paperspace

Collect the following as applicable:

- Block libraries** – *Block libraries often work with custom commands and may need to be translated and updated. For example, legacy libraries may use tight hatches in place of solid fills which makes files unnecessarily large.*
- Font resource files** -- Determine if custom fonts resource will need to be migrated. *Evaluate moving to Standard and TrueType fonts.*
- Pen tables** – (.stb and .ctb) files perform various functions which may be implemented via element and level properties. *Evaluate new methods of controlling output.*

Legacy Data Migration Plan

How will legacy data be handled?

- Legacy data will not be migrated.
- Legacy data will be referenced and/or copied as needed but will remain intact.
- Legacy data will be migrated in bulk.
- Legacy data will be migrated only as required.

What type of issues may be encountered? Include items such as units, xref locations, raster attachment issues and missing files.

Licensing

- Review licensing, maintenance and support policies for Bentley products.

Installation Plan

Create an installation plan. Be sure to include the following:

- Licensing
- Network and administrative access
- Deployment locations
- Image creation & install scripts
- Workspace and resource locations
- Testing plan

Training Plan

Create a training plan that includes both administrators and end users.

- MicroStation
- CAD Administration
- Customizations
- Other software products as applicable