

Migration guide - Deep Space

How to migrate to Deep Space

Follow this guide for a smooth cutover from legacy tools while protecting cashflow, compliance, and delivery.

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Overview

Goal: clean cutover with no impact to billing windows.

Scope: active projects, finance sync, portals, and document control.

Reference: use the Training and Implementation plan for cadence, roles, and session content.

Decide your migration scope

Import active data

Bring across in-flight contracts, claims, variations, budgets, document registers, companies, and contacts.

Use when projects are mid-cycle or finance needs continuity.

Start fresh

Stand up new projects with standard cost codes and templates.

Use when legacy data is messy and you want an operational reset.

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Choose your configuration approach

Standardised (recommended for groups)

Central team defines cost codes, approvals, claims and payment schedules, and document controls.

Pros: clean reporting, consistent WIP, easier training.

Cons: more upfront design.

Autonomous teams

Divisions or projects configure within guardrails.

Pros: faster local adoption.

Cons: harder to compare and roll up.

Create your migration plan

Approach

Document scope choice and configuration pattern. Include pilot results and the reason for switch.

Timeline

Plan 4 to 6 weeks from pilot sign-off to full go-live. Align to renewal dates of legacy tools.

Data and mapping

Connect Xero. Map CoA and tracking categories.

Import companies and contacts. Load cost codes and baseline budgets.

Stage contracts and claims for the next cycle.

Load document register and enforce latest-only controls.

Training

Role-based enablement for PM, CA, Site, HSEQ, and Finance.

Provide quick-start videos and help center links.

Communication

Create a migration Slack or Teams channel for your internal teams. Share FAQs, timelines, and owners.

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Roll out Deep Space

Provision users and permissions across legal entities. Confirm MFA and RBAC.

Create projects and teams. Start with fewer, grow as needed.

Import data if applicable. Validate mappings with a test import, then import production data.

Reconcile sample contracts and claims against the prior system.

Migrate integrations. Finance: enable Xero sync for AR and AP. Document control and email capture configured.

External portals for clients, subcontractors, and consultants enabled.

Sunset the previous tool. Move to read-only after the first successful month-end in Deep Space. Deliver training. Hold office hours in the first two cycles.

Validation checklist

- Budgets reconcile to zero variance
- Head and subcontract claims post to Xero correctly
- AR and AP match the ledger
- Forecast equals actuals after postings
- Document register shows current revisions only
- Portals working for clients, subcontractors, and consultants
- Email templates and reply-to capture in place

Cutover plan and timeline

Timing: choose a window outside claim and payment dates.

- Week 0: pre-kickoff sessions from the Training plan
- Days 1 to 2: kickoff. Xero live. First project configured
- Weeks 2 to 6: pilot on one or two live projects with weekly checkpoints
- Week 7: migration imports and validation
- Week 8: portfolio cutover and announcement

Freeze legacy entries during import windows. Keep read-only for reference.

Post-go-live review

Week 1: confirm claim dates, COA postings, dashboards. Fix gaps.

Weeks 2 to 4: office hours, close issues, harden settings.

Day 30: review reports, forecast vs actuals, portal usage, site adoption.

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Roles and ownership

- Champion: coordination, communications, sign-offs
- Commercial lead: budgets, contracts, claims, variations
- Finance: COA, tracking, reconciliation, WIP
- Project admin: permissions, project setup, cutover
- Site lead: drawings, RFIs, SIs, NCRs, dockets
- HSEQ: ITPs, NCR to CAPA, inductions, evidence

Risk log

- Contract constraints delay cutover → run parallel pilots and limit scope to new projects first
- Incorrect COA mapping → finance sign-off and test exports before go-live
- Superseded drawings on site → enforce latest-only controls and train the Site App
- Low adoption risk → schedule role-based refreshers and maintain office hours

Announcement template

Subject: Moving our projects to Deep Space

All,

We are moving our project operations to Deep Space this month.

Why: better control of claims and forecasting, one source of truth for documents and QA, cleaner reporting for WIP and month-end.

What to expect: minimal disruption during cutover. Training is scheduled by role next week. If your project timing is sensitive, contact the Pilot Lead to coordinate.

Do now: join the migration channel, review the quick-start for your role.

Thanks,

Operations

Resources

- Training and Implementation plan
- Pilot Guide
- Migration workbook and import templates
- Role playbooks for Commercial, Site, Finance, HSEQ