



How to Guide

Document Migration

Version: Release 3.0

Date: 31st August 2017

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1. Document Purpose

The purpose of this document is to guide users on how to migrate documents using the BDB Platform. It is recommended that users follow the step by step process given below.

2. Pre-requisites

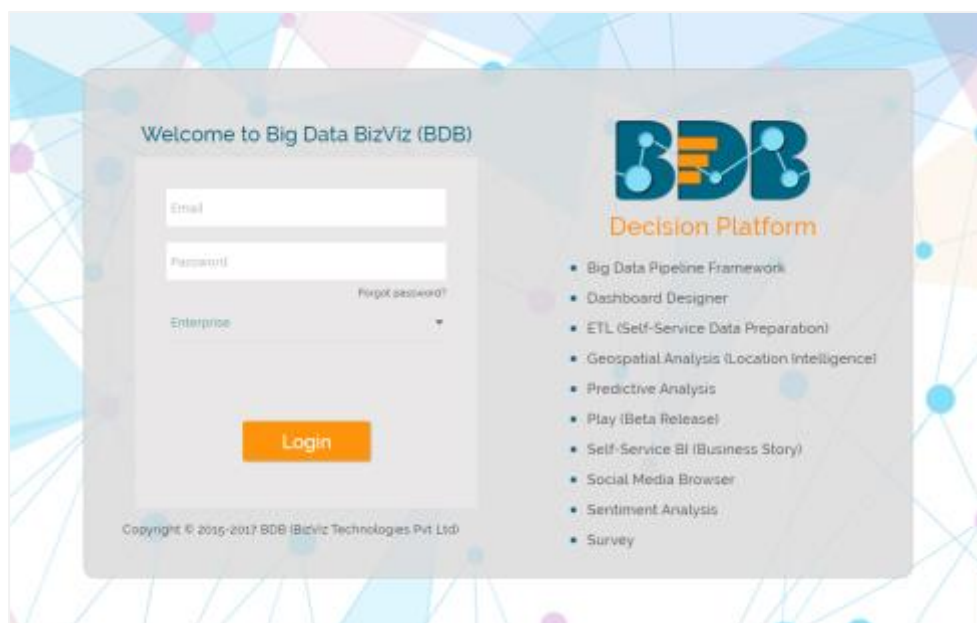
- o Browser that supports HTML5
- o Operating System: Windows 7
- o Basic understanding of the BizViz Server

3. Step-by-Step Process

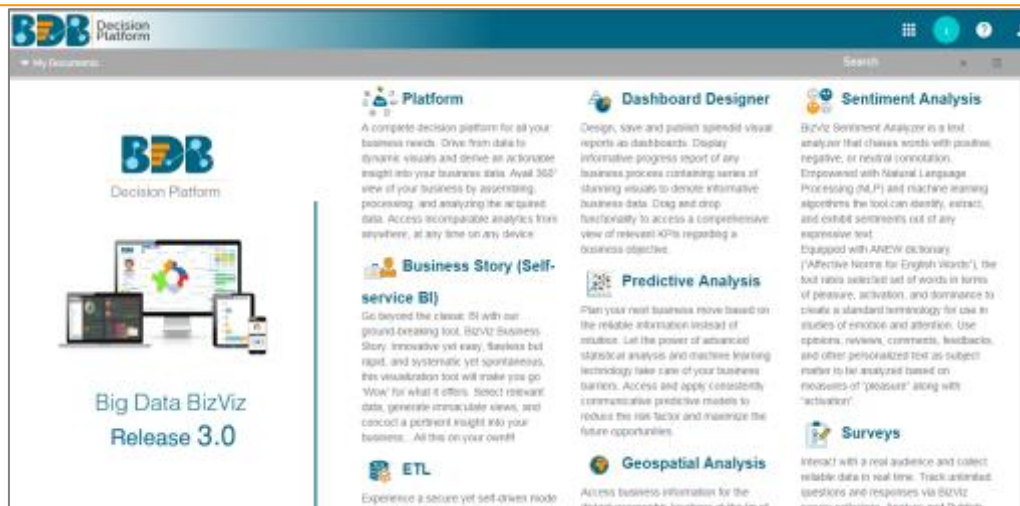
3.1. Accessing the BDB Platform

This section explains how to access the BizViz Platform and variety of plugins that it offers:


- Open BDB Enterprise Platform Link: <http://apps.bdbizviz.com/app/>
- Enter your credentials to log in.
- Click 'Login'

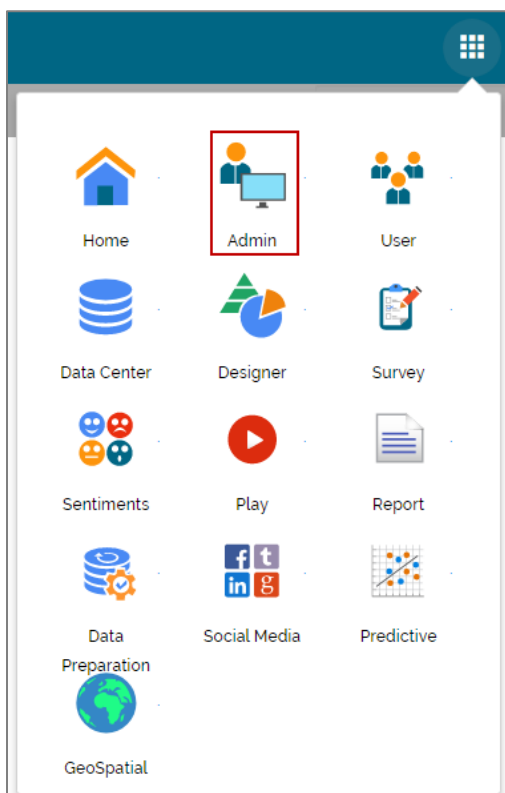


- Users will be redirected to the BDB Platform home page.

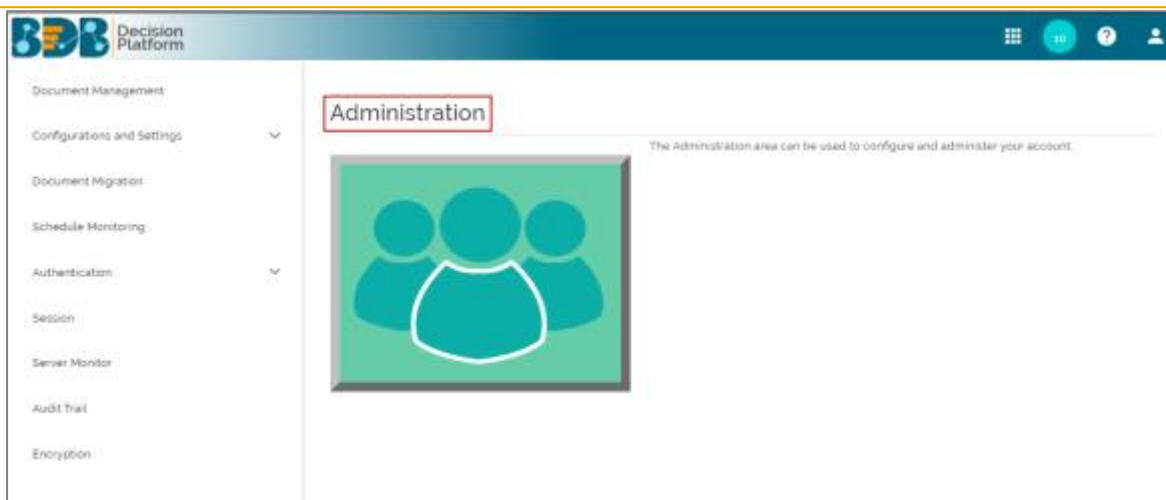


3.2. Accessing the Administration Module

- i) Navigate to the Platform home page.
- ii) Click 'Apps' menu 
- iii) A menu containing all the plugins will be displayed.
- iv) Select and click the 'Admin' plugin.



- v) Users will be directed to the 'Administration' page.
- vi) Various administration options will be displayed on the left side of the page.

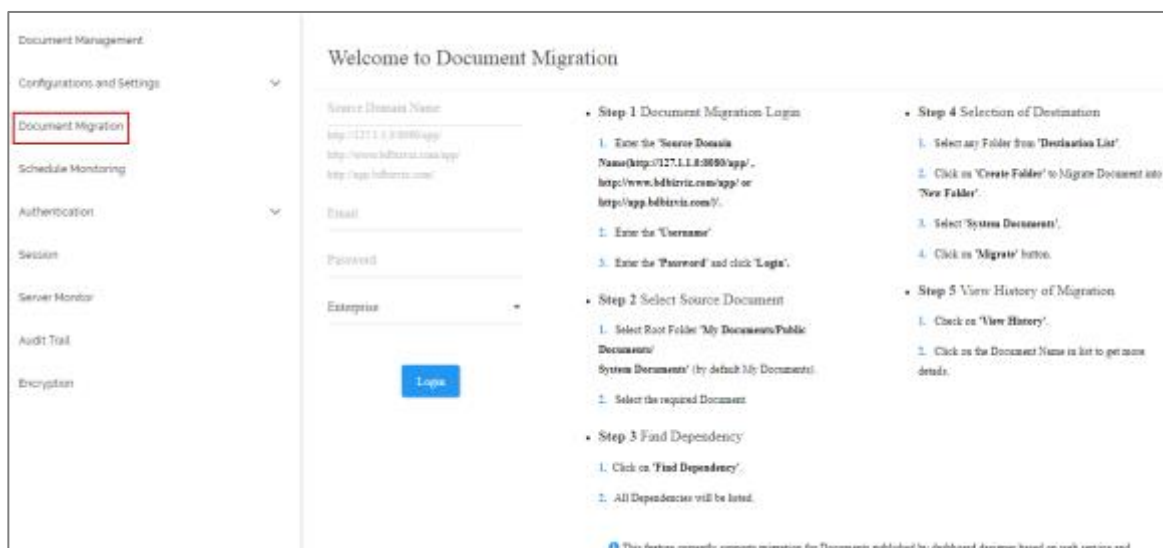


3.3. Document Migration Settings

This section explains step by step process for document migration.

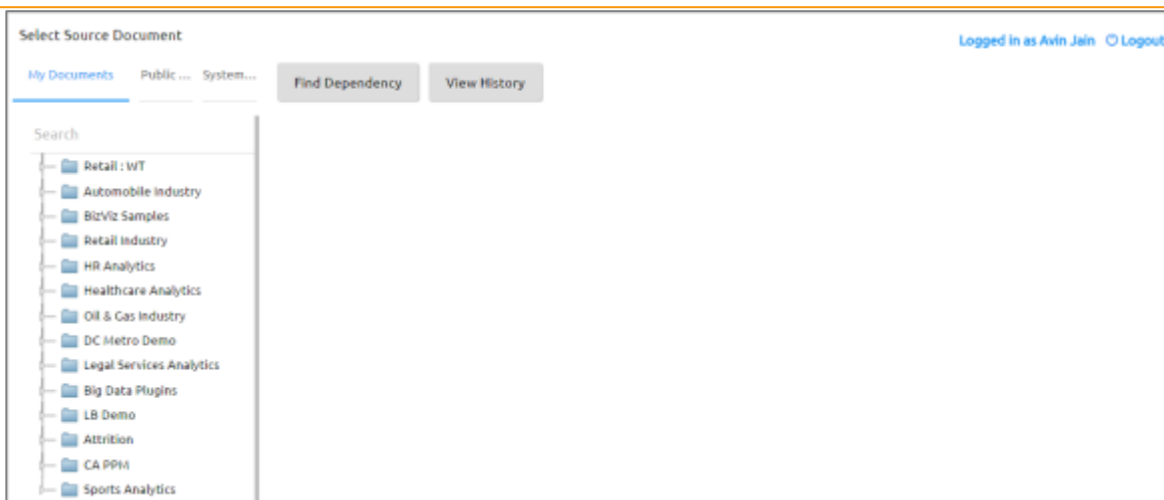
3.3.1. Document Migration Login

- i) Select 'Document Migration' from the list of admin options.
- ii) Fill in the following information:
 - a. **Source Domain Name:** Enter address of the destination server.
 - b. **Email:** Enter email address of the account from where document is to be shared.
 - c. **Password:** Enter password of the account.
 - d. **Domain:** Select the desired domain from the drop-down menu.
- iii) Click 'Login'



3.3.2. Select Source Document

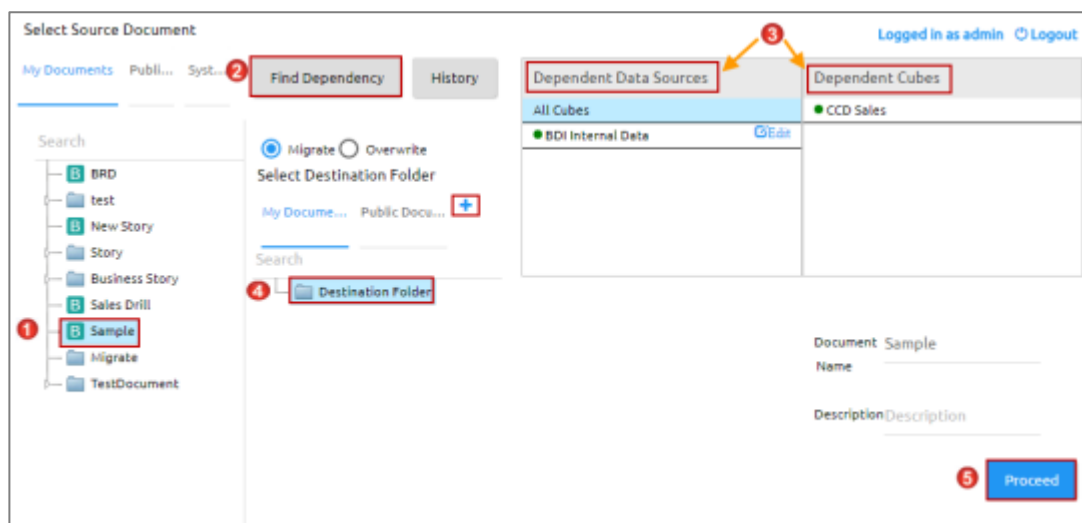
- i) By Clicking on 'Login' users will be redirected to the below-given page.
- ii) A list of the available files (source documents) under the Logged-in account will be displayed.



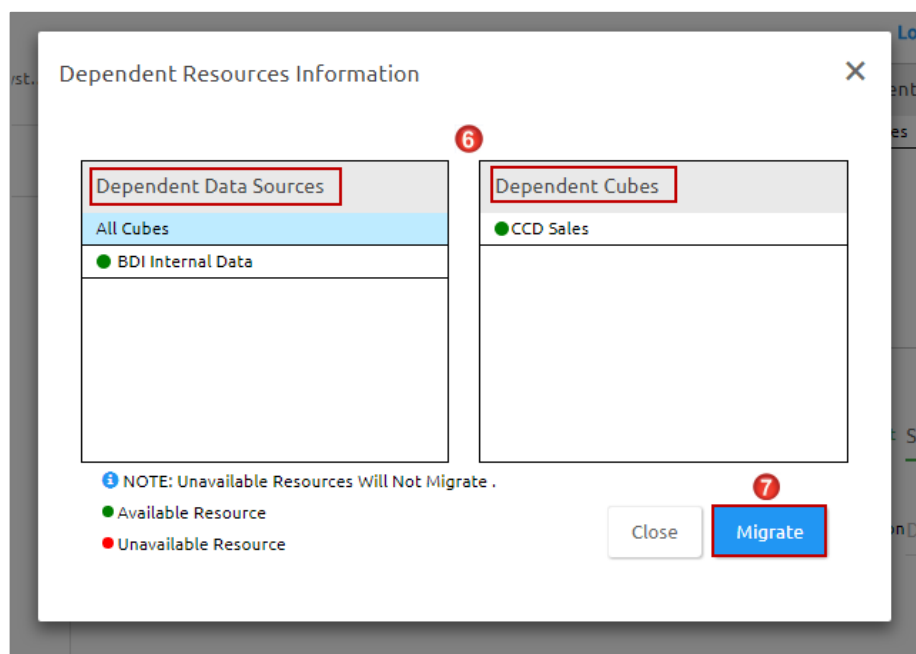
Note: 'My Documents' opens by default displaying the list of source documents.

3.3.3. Steps to Migrate

- i) Select a file from the list of source documents.
- ii) Click 'Find Dependency'
- iii) Dependent Data Sources and Cubes/Data Services will be displayed.
- iv) Click the 'Add' option **+** to create a new folder in the destination account.
OR
Select an existing folder as a destination folder.
- v) Click 'Proceed'

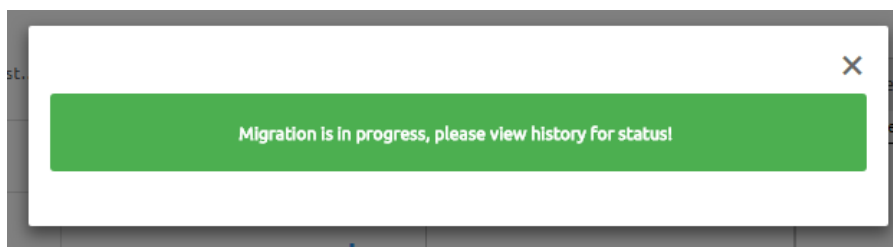


- vi) A new window will pop-up displaying information about the dependent resources.
- vii) Click 'Migrate'

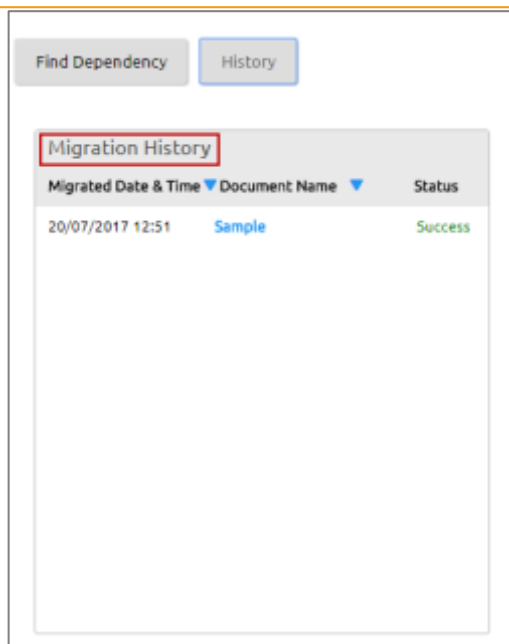


3.3.4. View Migration History

- i) A message pops-up while clicking the **'Migrate'** option redirecting the user to view the migration status.



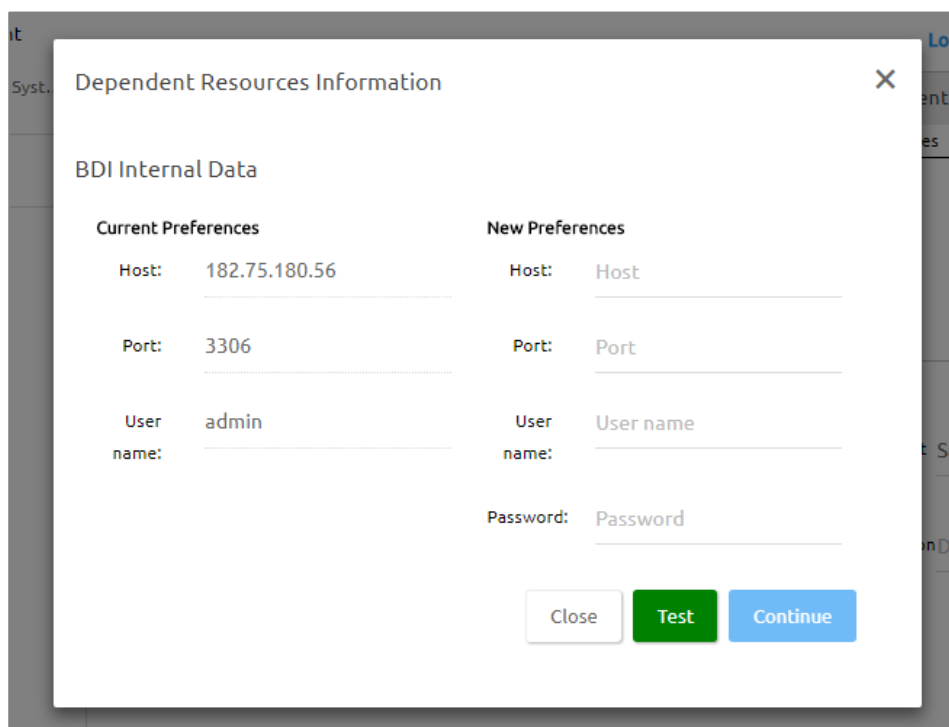
- ii) Click **'History'** on the selected Source Document page.
- iii) Users will be redirected to a pop-up window displaying the migration history.



iv) Click on the document for more details.


Note:

- a. This feature does not support folder migration.
- b. Flat files as source document will display an error message, “**Dependency not found.**” while clicking the ‘**Find Dependency**’ option.
- c. If a deleted data connector/dataset/data store is used as source document, then it will display an error while finding dependency.
- d. Users can edit the Dependent Data Source information by using the ‘**Edit**’ option provided on the Select Source Document page.



4. Signing Out

The following steps describe how to sign out from the BizViz Platform:

- i) Click the 'User' icon  on the Platform home page.
- ii) A menu appears with the logged in user details.
- iii) Click 'Sign Out'
- iv) Users will be successfully logged out from the **BizViz Platform**.

Note: By Clicking the 'Sign Out' option users will be redirected to the 'Login' page of the BizViz platform.