

BizViz How-to-Guide

Platform

Document Migration

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1. Document Purpose

The purpose of this document is to guide users on how to transfer published dashboards from one account to another. It is recommended to follow the step-by-step process given below to successfully transfer files between multiple accounts.

2. Prerequisites

2.1. Software

- Browser that supports HTML5
- Operating System: Windows7

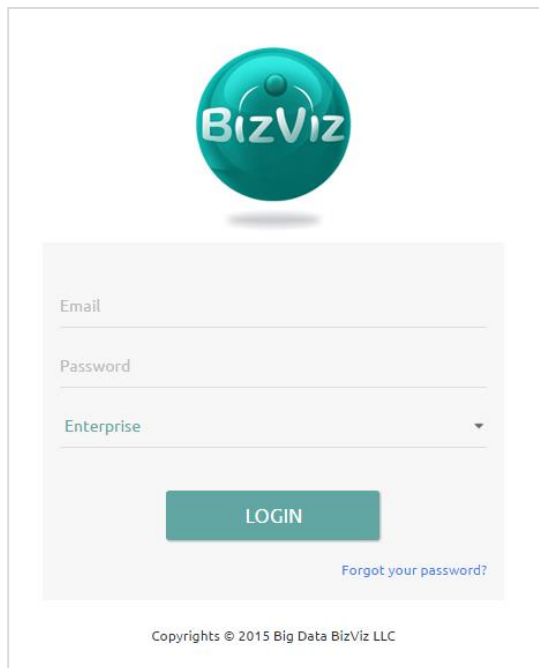
2.2. Knowledge of BizViz Server

The user should have a basic understanding of the BizViz Server

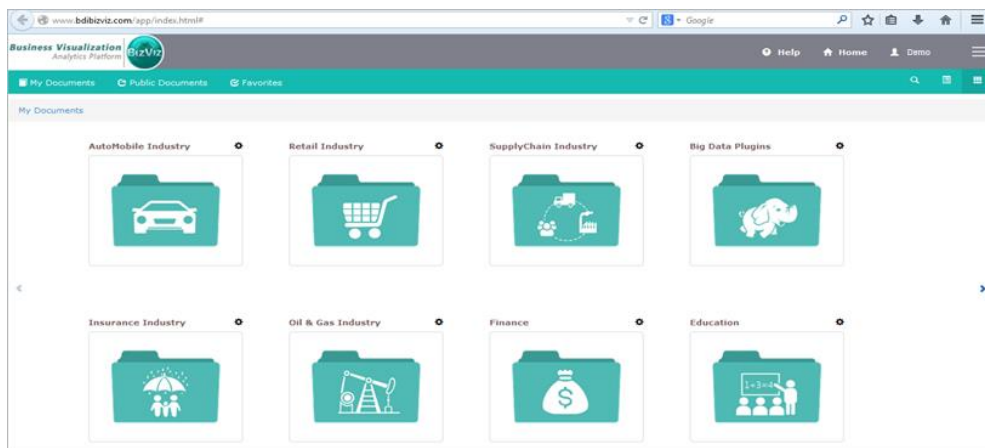
3. Step-by-Step Process

3.1. Login to the BizViz Portal

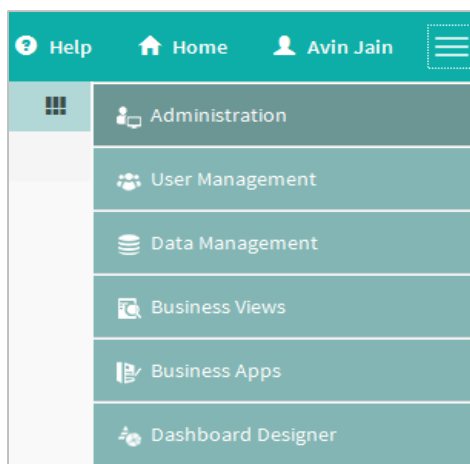
- In the URL bar, enter → <http://apps.bdbizviz.com/app/index.html>
- Enter your credentials to Login



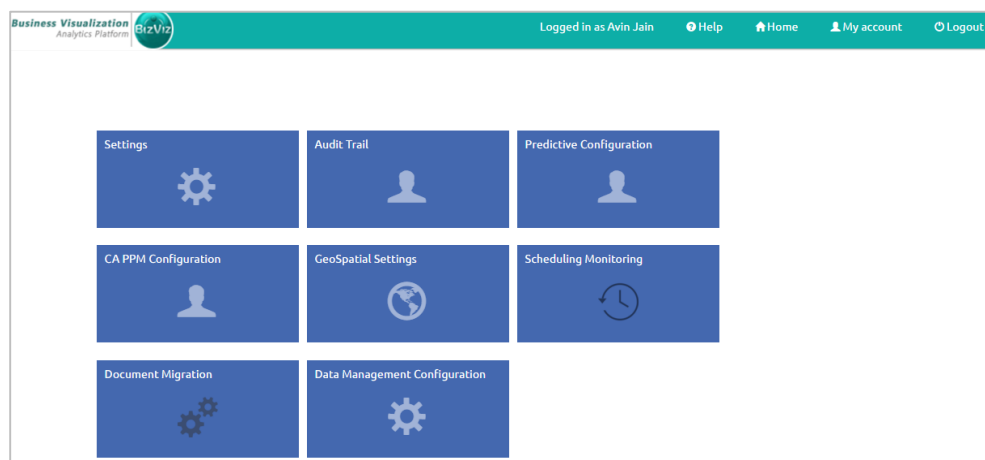
- Click on '**Login**' to view the BizViz Portal Home Screen



iv) Click on the 'Menu'  button to display a list of the installed applications.

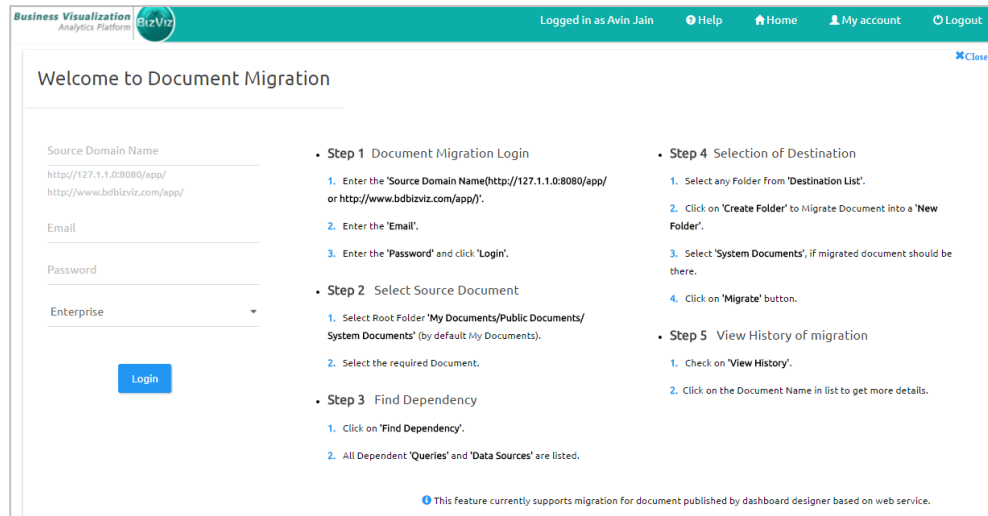


v) Click on 'Administration' plug-in available in the above figure (see above)



3.2. Configuring Document Migration

i) Clicking on ‘Document Migration’ will redirect user to the following page

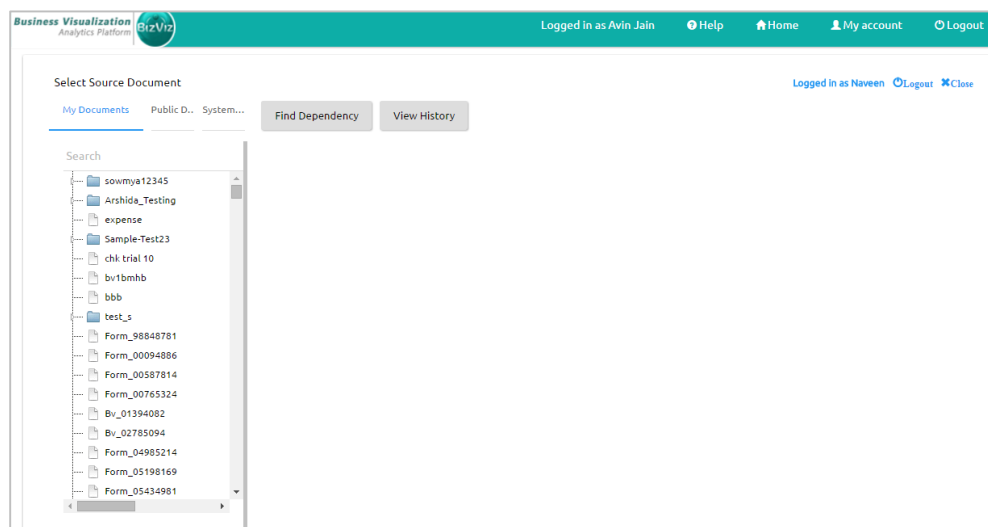


ii) Enter the following fields:

- **Source Domain Name:** Address of the destination server
- **Email:** Email address of the account from where document is to be shared
- **Password:** Password of the account
- **Domain:** Select the desired domain

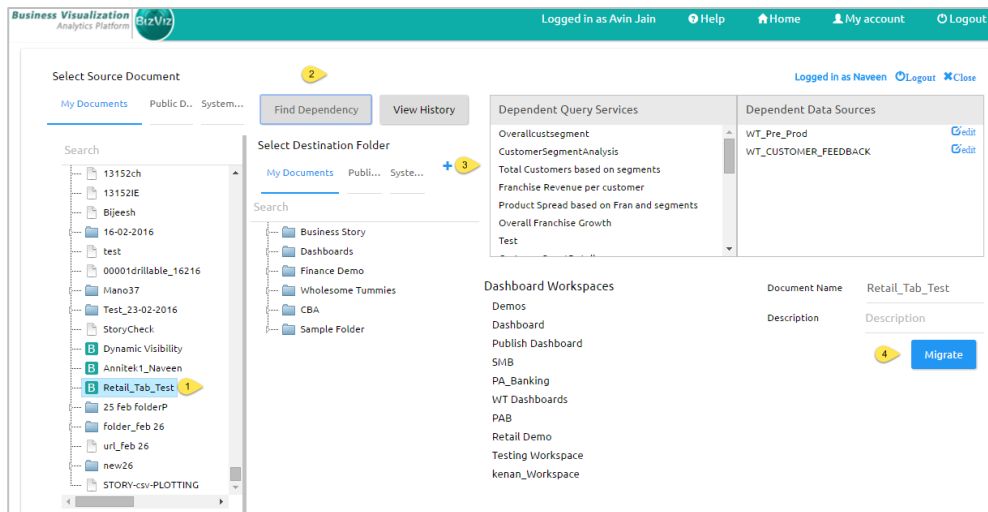
iii) Click on ‘Login’

iv) Clicking on the ‘Login’ will redirect user to the following page



v) Displays list of files available under the ‘Logged-in’ account

vi) Select a file for transfer and click on ‘File Dependency’ as shown below



vii) Follow the step-by-step process to migrate the file

- Click on the **'File'**
- Click on the **'File Dependency'** to list the dependent queries and data sources of the selected file
- Select **'+'** icon to create a new folder in the destination account
- Click on **'Migrate'** button to transfer