## **BizViz How-to-Guide**

### **Platform**

### **Document Migration**

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2.0

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# le <mark>BizViz</mark>

#### **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 Serve

#### 3. Step-by-Step Process

#### **3.1. Login to the BizViz Portal**

- i) In the URL bar, enter  $\rightarrow$  <u>http://apps.bdbizviz.com/app/index.html</u>
- ii) Enter your credentials to Login

В	
Email	
Password	
Enterprise	,
	LOGIN
	Forgot your password

iii) Click on 'Login' to view the BizViz Portal Home Screen



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

Help	🕈 Home 💄 Avin Jain 🗮
	and Administration
	📇 User Management
	😂 Data Management
	🔞 Business Views
	₽⁄ Business Apps
	👆 Dashboard Designer

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

Business Visual Analytics	ization Platform		Logged in as Avin Jain	😯 Help	<b>↑</b> Home	L My account	🖰 Logout
	Settings	Audit Trail	Predictive Configuration				
	*	<b>.</b>	<b>.</b>				
	CA PPM Configuration	GeoSpatial Settings	Scheduling Monitoring				
	<b>1</b>	$\bigcirc$					
	Document Migration	Data Management Configuration					
	a <sup>o</sup>	*					



#### **3.2.** Configuring Document Migration

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

Analytics Platform	Logged in as Av	in Jain	🕑 Help	<b>↑</b> Home	👤 My account	🖰 Logout		
Welcome to Document I	Migration					×Clo:		
Source Domain Name	• Step 1 Document Migration Login		Step 4 Sele	ction of Des	tination			
http://127.1.1.0:8080/app/	1. Enter the 'Source Domain Name(http://127.1.1.0:8080/app/		1. Select any Folder from 'Destination List'.					
Source Domain Name http://127.1.1.028880/spp/ http://www.bdbiaviz.com/spp/ Email Password Enterprise	or http://www.bdbizviz.com/app/)'.		2. Click on 'Create Folder' to Migrate Document into a 'New					
Email	<ol><li>Enter the 'Email'.</li></ol>		Folder'.					
Password	3. Enter the 'Password' and click 'Login'.		<ol> <li>Select 'Systematic there.</li> </ol>	em Documents',	if migrated document s	hould be		
	Step 2 Select Source Document		4. Click on 'Mi	grate' button.				
Enterprise	* 1. Select Root Folder 'My Documents/Public Documents/							
	System Documents' (by default My Documents).	•	Step 5 Vie	w History of	migration			
	2. Select the required Document.		1. Check on 'V	iew History'.				
Login	• Step 3 Find Dependency		2. Click on the	Document Name	in list to get more deta	iils.		
	1. Click on 'Find Dependency'.							
	2. All Dependent 'Queries' and 'Data Sources' are listed.							
	• This feature currently supports migration	for docum	nent published by	/ dashboard desi	gner based on web serv	ice.		

- 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

s Visualization Analytics Platform		Logged in as Avin Jain	😯 Help	<b>↑</b> Home	L My account	O Logou
Select Source Document				Log	ged in as Naveen OLog	out XClose
My Documents Public D System Find Depende	ncy View History					
Search						
💼 sowmya12345						
🛅 Arshida_Testing						
🖹 expense						
🚞 Sample-Test23						
💾 chk trial 10						
💾 bv1bmhb						
💾 bbb						
🚞 test_s						
💾 Form_98848781						
B Form_00094886						
💾 Form_00587814						
Porm_00765324						
🕒 Bv_01394082						
Bv_02785094						
💾 Form_04985214						
💾 Form_05198169						
🕒 Form_05434981 🔹						
• • • • • • • • • • • • • • • • • • •						

- 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