Oracle® Cloud

Migrating Oracle Data Visualization Cloud Service Instances to Oracle Cloud Infrastructure
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### 1 Learn About Migrating to Oracle Cloud Infrastructure

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### 2 Prepare to Migrate Oracle Data Visualization Cloud Service Instances

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Preface

Learn how to migrate from Oracle Data Visualization Cloud Service to Oracle Analytics Cloud on Oracle Cloud Infrastructure.

Topics:
• Audience
• Documentation Accessibility
• Related Documents
• Conventions

Audience

*Migrating Oracle Data Visualization Cloud Service Instances to Oracle Cloud Infrastructure* is intended for administrators who migrate services and content from Oracle Data Visualization Cloud Service to Oracle Analytics Cloud on Oracle Cloud Infrastructure.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

These related Oracle resources provide more information.
• Oracle Cloud http://cloud.oracle.com
• Getting Started with Oracle Cloud
• Getting Started with Oracle Analytics Cloud
• Administering Oracle Analytics Cloud on Oracle Cloud Infrastructure (Gen 2)
• Administering Oracle Analytics Cloud
• Preparing Data in Oracle Analytics Cloud
Conventions

Conventions used in this document are described in this topic.

Text Conventions

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><code>monospace</code></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>

Videos and Images

Your company can use skins and styles to customize the look of the Oracle Analytics Cloud, dashboards, reports, and other objects. It is possible that the videos and images included in the product documentation look different than the skins and styles your company uses.

Even if your skins and styles are different than those shown in the videos and images, the product behavior and techniques shown and demonstrated are the same.
Learn About Migrating to Oracle Cloud Infrastructure

Learn about how to migrate from Oracle Data Visualization Cloud Service to Oracle Analytics Cloud on Oracle Cloud Infrastructure.

Topics:
- About the Migration Scope
- About the Migration Task Flow
- About the Migration Tooling

About the Migration Scope

Before migrating from Oracle Data Visualization Cloud Service to Oracle Analytics Cloud on Oracle Cloud Infrastructure, consider the scope and constraints of this migration path.

Migration scenarios covered in this Guide

<table>
<thead>
<tr>
<th>Migration Scenario</th>
<th>Source Oracle Data Visualization Cloud Service</th>
<th>Target Oracle Analytics Cloud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloud Service</td>
<td>Oracle Data Visualization Cloud Service Latest version (19.2.2 or later)</td>
<td>Oracle Analytics Cloud Latest version (5.3 or later)</td>
</tr>
<tr>
<td>Cloud Subscription</td>
<td>Traditional metered subscription or nonmetered subscription to Oracle Cloud</td>
<td>Cloud account subscription to Oracle Analytics Cloud - Professional Edition. Either:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Universal Credits</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Fixed Oracle Analytics Cloud Subscription</td>
</tr>
<tr>
<td>Identity Management</td>
<td>Traditional identity management through Oracle Cloud Infrastructure Classic Console (previously called My Services)</td>
<td>Oracle Identity Cloud Service</td>
</tr>
</tbody>
</table>

If you're not sure which versions are running in your source and target environments, ask your Oracle representative.
**Not covered in this Guide**

<table>
<thead>
<tr>
<th>Migration scenario</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database migration</td>
<td>You must migrate your Oracle Database Classic Cloud Service on Oracle Cloud Infrastructure Classic (if any) to Oracle Cloud Infrastructure.</td>
<td>Migrate Databases Using the Migration Tools</td>
</tr>
</tbody>
</table>

**About the Migration Task Flow**

You use a snapshot to migrate an Oracle Data Visualization Cloud Service instance to Oracle Analytics Cloud on Oracle Cloud Infrastructure. Before you start the migration, you need to prepare and set up a target Oracle Analytics Cloud instance on Oracle Cloud Infrastructure. Here’s what you need to do.

- Prepare to Migrate
- Migrate Your Service
- Complete Post-Migration Tasks

**Overview**

**Prepare to Migrate**

1. Plan your new service
2. Create service on OCI
3. Migrate users and roles to OCI
4. Whitelist new service

**Migrate Content**

1. Back up both services
2. Take a snapshot of the source
3. Download snapshot
4. Upload snapshot on target
5. Restore snapshot
6. Configure system settings
7. Configure search crawl users
8. Verify application roles
9. Migrate file-based data

**Post Migration**

1. Test service on OCI
2. Delete resources on OCI-Classic

**Prepare to Migrate**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan your new service</td>
<td>Plan your Oracle Analytics Cloud deployment on Oracle Cloud Infrastructure. Think about what you want before you start.</td>
<td>Plan Your Service on Oracle Cloud Infrastructure</td>
</tr>
</tbody>
</table>
### Complete your order and sign in to your Oracle Cloud account

You must have a subscription for Oracle Analytics Cloud (or Oracle Analytics Cloud Subscription) to create services on Oracle Cloud Infrastructure.

As Cloud Account Administrator, you can complete all setup tasks.

**More Information:** Sign In For the First Time

### Create a service on Oracle Cloud Infrastructure

Create an Oracle Analytics Cloud instance with the required size and shape on Oracle Cloud Infrastructure.

If you subscribe through Universal Credits, create the service with Oracle Analytics Cloud.

If you have a non-metered subscription, create the service with Oracle Analytics Cloud Subscription.

**More Information:** Create a Service with Oracle Analytics Cloud, Create a Service with Oracle Analytics Cloud Subscription

### Verify your service

Verify that your service is up and running and that you can sign in.

**More Information:** Verify Your Service and Sign In

### Migrate users and roles

Migrate users and roles from your traditional Oracle Data Visualization Cloud Service account to Oracle Identity Cloud Service available with your Cloud account.

**More Information:** Migrate Users and Roles from Oracle Data Visualization Cloud Service

### Whitelist the IP of your service on your data sources

If you whitelisted the IP of your Oracle BI Cloud Service instance, you must perform this task again for the new Oracle Analytics Cloud instance on Oracle Cloud Infrastructure.

**More Information:** IP Ranges and Gateway IPs for Oracle Analytics Cloud on Oracle Cloud Infrastructure (Gen 2)

### Migrate Your Service

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand snapshot options</td>
<td>Understand what you can include or exclude when you take a snapshot.</td>
<td>Understand Snapshot Options</td>
</tr>
<tr>
<td>Check that your target is ready for migration and take a backup</td>
<td>Verify that the required users and roles are available in your target service and take a snapshot in case you need to roll back.</td>
<td>Back Up Your Target Service Before Migration</td>
</tr>
<tr>
<td>Take a snapshot of the source</td>
<td>Capture the content you want to migrate on the source system.</td>
<td>Take a Snapshot on the Source</td>
</tr>
<tr>
<td>Download the snapshot</td>
<td>Download the snapshot that you want to migrate to your local file system.</td>
<td>Download the Snapshot</td>
</tr>
<tr>
<td>Upload the snapshot to the target</td>
<td>Sign in to the target system and upload the snapshot.</td>
<td>Upload the Snapshot on the Target</td>
</tr>
<tr>
<td>Restore the snapshot content</td>
<td>Select the newly uploaded snapshot in the list of saved snapshots and restore the content in the snapshot. After restoring the snapshot you must perform additional tasks to complete the migration. For example, you must migrate data files, verify application role assignments, and more.</td>
<td>Restore the Snapshot on the Target</td>
</tr>
</tbody>
</table>
About the Migration Tooling

You use a snapshot to migrate your Oracle Data Visualization Cloud Service instance to Oracle Analytics Cloud on Oracle Cloud Infrastructure. In certain situations, you might also use the Data Migration Utility.

- **Snapshots**: Migrates your content, file-based data, application role assignments, and other settings from your Oracle Data Visualization Cloud Service instance to Oracle Cloud Infrastructure.

- **Data Migration Utility**: Migrates your file-based data to Oracle Cloud Infrastructure. Only required if network connectivity or storage access issues prevents data file migration with the snapshot.
### Prepare to Migrate Oracle Data Visualization Cloud Service Instances

Before you migrate Oracle Data Visualization Cloud Service instances to Oracle Cloud Infrastructure, plan and prepare for migration.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan your new service</td>
<td>Plan your Oracle Analytics Cloud deployment on Oracle Cloud Infrastructure. Think about what you want before you start.</td>
<td>Plan Your Service on Oracle Cloud Infrastructure</td>
</tr>
<tr>
<td>Complete your order and sign in to your Oracle Cloud account</td>
<td>You must have a subscription for Oracle Analytics Cloud (or Oracle Analytics Cloud Subscription) to create services on Oracle Cloud Infrastructure. As Cloud Account Administrator, you can complete all setup tasks.</td>
<td>Sign In For the First Time</td>
</tr>
<tr>
<td>Create a service on Oracle Cloud Infrastructure</td>
<td>Create an Oracle Analytics Cloud instance with the required size and shape on Oracle Cloud Infrastructure. If you subscribe through Universal Credits, create the service with Oracle Analytics Cloud. If you have a non-metered subscription, create the service with Oracle Analytics Cloud Subscription.</td>
<td>Create a Service with Oracle Analytics Cloud Create a Service with Oracle Analytics Cloud Subscription</td>
</tr>
<tr>
<td>Verify your service</td>
<td>Verify that your service is up and running and that you can sign in.</td>
<td>Verify Your Service and Sign In</td>
</tr>
<tr>
<td>Migrate users and roles</td>
<td>Migrate users and roles from your traditional Oracle Data Visualization Cloud Service account to Oracle Identity Cloud Service available with your Cloud account.</td>
<td>Migrate Users and Roles from Oracle Data Visualization Cloud Service</td>
</tr>
<tr>
<td>Whitelist the IP of your service on your data sources</td>
<td>If you whitelisted the IP of your Oracle BI Cloud Service instance, you must perform this task again for the new Oracle Analytics Cloud instance on Oracle Cloud Infrastructure.</td>
<td>IP Ranges and Gateway IPs for Oracle Analytics Cloud on Oracle Cloud Infrastructure (Gen 2)</td>
</tr>
</tbody>
</table>
About Downtime Requirements

The migration process doesn't affect the availability of your existing Oracle Data Visualization Cloud Service. Users can continue to sign in and use the service.

Note:

If you do allow users to access and make changes after you've taken the final snapshot for migration, you need to take another snapshot and repeat the migration if you want to include any changes that they make.

After the Oracle Data Visualization Cloud Service instance is migrated successfully, you can reroute users to the new Oracle Analytics Cloud instance on Oracle Cloud Infrastructure.

Plan Your Service on Oracle Cloud Infrastructure

Take some time to plan your service on Oracle Cloud Infrastructure before you create it. Consider the size, shape, and location of your current deployment and decide what you want your Oracle Cloud Infrastructure to look like, before you start. If it helps, use a checklist similar to the one shown here.

• Planning checklist - an example
• Which type of subscription do you need?
• Which edition do you need?
• What sizing options are available to you?
  – How many OCPUs do you think you'll need?
  – How many people will use the service?
• Where do you want to deploy your service?
• What name do you want for your service?

Planning checklist - an example

Use a checklist similar to this one to help you decide.
Which type of subscription do you need?

If you subscribe through Universal Credits, you create services on Oracle Cloud Infrastructure with Oracle Analytics Cloud. If you have a non-metered subscription, you use Oracle Analytics Cloud Subscription to create services on Oracle Cloud Infrastructure.

**Subscription types on Oracle Cloud Infrastructure:**
- Oracle Analytics Cloud (Universal Credits)
- Oracle Analytics Cloud Subscription

Which edition do you need?

In most cases, you need Oracle Analytics Cloud - Professional Edition.

**Edition options available on Oracle Cloud Infrastructure:**
- **Professional Edition**: Suitable if you want to offer only data visualization and migrate only data visualization artifacts.
- **Enterprise Edition**: Suitable if you want to offer data visualization, plus enterprise modeling and reporting features.
- **Essbase Edition**: Not applicable when you migrate from Oracle Data Visualization Cloud Service.

### Plan Your Service on Oracle Cloud Infrastructure

<table>
<thead>
<tr>
<th>Plan</th>
<th>My Existing Oracle Data Visualization Cloud Service</th>
<th>My New Oracle Analytics Cloud on Oracle Cloud Infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subscription</strong></td>
<td>□ Oracle Data Visualization Cloud (Traditional Metered)</td>
<td>□ Oracle Analytics Cloud (Universal Credits)</td>
</tr>
<tr>
<td></td>
<td>☒ Oracle Data Visualization Cloud (Traditional Nonmetered)</td>
<td>☒ Oracle Analytics Cloud Subscription</td>
</tr>
<tr>
<td><strong>Edition and Feature Set</strong></td>
<td>Data Visualization</td>
<td>Professional Edition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Data Visualization</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Enterprise Edition</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>☒ Business Intelligence (with Data Visualization)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Essbase Edition</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>☒ Essbase*</td>
</tr>
</tbody>
</table>

*This Guide describes how to migrate to an Oracle Analytics Cloud with data visualization services.

<table>
<thead>
<tr>
<th>Size</th>
<th>Number of Users: <em><strong>30</strong></em></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Users: <em><strong>25</strong></em> (additional user capacity required)</td>
</tr>
<tr>
<td></td>
<td>Number of OCPUs: N/A</td>
</tr>
</tbody>
</table>

* User/OCPU numbers not required with Universal Credit subscriptions.

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Location</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Name</th>
<th>company123456</th>
<th>company123456</th>
</tr>
</thead>
</table>

---

**Which type of subscription do you need?**

If you subscribe through Universal Credits, you create services on Oracle Cloud Infrastructure with Oracle Analytics Cloud. If you have a non-metered subscription, you use Oracle Analytics Cloud Subscription to create services on Oracle Cloud Infrastructure.

**Subscription types on Oracle Cloud Infrastructure:**
- Oracle Analytics Cloud (Universal Credits)
- Oracle Analytics Cloud Subscription

**Which edition do you need?**

In most cases, you need Oracle Analytics Cloud - Professional Edition.

**Edition options available on Oracle Cloud Infrastructure:**
- **Professional Edition**: Suitable if you want to offer only data visualization and migrate only data visualization artifacts.
- **Enterprise Edition**: Suitable if you want to offer data visualization, plus enterprise modeling and reporting features.
- **Essbase Edition**: Not applicable when you migrate from Oracle Data Visualization Cloud Service.
What sizing options are available to you?

If you subscribe to Oracle Analytics Cloud through Universal Credits, you specify the number of Oracle Compute Units (OCPUs) you want to deploy. If you subscribe to Oracle Analytics Cloud Subscription, you either specify how many people you expect to use the service or the number of OCPUs.

<table>
<thead>
<tr>
<th>Size Options</th>
<th>Oracle Analytics Cloud (Universal Credits)</th>
<th>Oracle Analytics Cloud Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of OCPUs</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Number of Users</td>
<td>-</td>
<td>Yes</td>
</tr>
</tbody>
</table>

How many OCPUs do you think you'll need?

Oracle Cloud Infrastructure offers a range of compute sizes (OCPUs) to suit different scenarios. The larger the compute size, the greater the processing power. If you’re not sure which compute shape best suits your needs, discuss your requirements with your Oracle representative.

For more guidance, read How many OCPUs do you think you’ll need for Business Intelligence and Data Visualization?

How many users will use the service?

With Oracle Analytics Cloud Subscription, you can specify how many people you expect to use the service. Verify how many people are using your Oracle Data Visualization Cloud Service and consider whether or not this number of users is likely to increase.

For more guidance, read How many people do you expect to use the service?

Where do you want to deploy your service?

Verify the region where you deploy Oracle Data Visualization Cloud Service.

Oracle Cloud Infrastructure is hosted in geographic areas, also called regions. If multiple regions are available to you, decide where you want to deploy your service. For example, Phoenix, Ashburn, Frankfurt, London. To find out which regions are available, see [www.oracle.com/cloud/data-regions.html](http://www.oracle.com/cloud/data-regions.html).

What name do you want for your service?

Think about a suitable name for your service. The name that you specify is displayed in Oracle Cloud Infrastructure Console and in the URL for your service.

Naming conventions on Oracle Cloud Infrastructure:

- Must contain between 1 and 25 characters.
- Must start with an ASCII letter: a to z or A to Z.
- Must contain only ASCII letters or numbers.
- Mustn’t contain any other special characters.
- Must be unique within the identity domain.
Create Your Service on Oracle Cloud Infrastructure

As Cloud Account Administrator, you can create services on Oracle Cloud Infrastructure. If you subscribe through Universal Credits, create the service with Oracle Analytics Cloud. If you have a non-metered subscription, create the service with Oracle Analytics Cloud Subscription.

Topics

• Create a Service with Oracle Analytics Cloud
  Oracle recommends that you deploy new services on Oracle Cloud Infrastructure Gen 2. If you don't have access yet, see When and how do I access the new administration console for Oracle Cloud Infrastructure (Gen 2)?

• Create a Service with Oracle Analytics Cloud Subscription

Create a Service using the Console

You can use Oracle Cloud Infrastructure Console to set up a service instance with Oracle Analytics Cloud.

1. Sign in to your Oracle Cloud account.
   You must sign in as a federated Oracle Identity Cloud Service user.

2. In Console, click in the top left corner.

3. Under Solutions and Platform, select Analytics, then Analytics Cloud.
4. From the **Compartment** list, select the compartment in which you want to create the service.

5. Click **Create Instance**.

6. Enter an **Instance Name** and a brief description.
   The name must start with a letter and can contain only letters and numbers.

7. Select the **Feature Set** you want to deploy.
   - **Self Service Analytics**: Deploys an instance with data visualization. Select this option if you subscribe to Professional Edition.
   - **Enterprise Analytics**: Deploys an instance with enterprise modeling, reporting, and data visualization. Select this option if you subscribe to Enterprise Edition.

8. For Capacity, select the number of **OCPUs** that you want for the service.
   For production services, select the number of OCPUs you want to deploy (between 2 and 52). If you want to create an instance for trial purposes, you can select 1 OCPU.

9. For **License Type**, select whether you want to use your Oracle Middleware on-premises license with Oracle Analytics Cloud and be charged the Bring Your Own License (BYOL) rate or subscribe to a new Oracle Cloud license for Oracle Analytics Cloud.

10. Verify that the details are correct, and click **Create**.

    For example:
It takes about 20 minutes to create the service. Display the Instance page to check the current status.

Create a Service with Oracle Analytics Cloud Subscription

You use Oracle Cloud Infrastructure Console to set up a service with Oracle Analytics Cloud Subscription. Follow these steps if you have a non-metered subscription.

1. Sign in to Oracle Cloud as the Cloud Account Administrator.
   If you're signing in for the first time, you can find your account name and login information in your welcome email.
2. In Oracle Cloud Infrastructure Console, click Navigation menu icon in the top left corner.

3. Under More Oracle Cloud Services, go to Platform Services and click Analytics.

4. Click Navigation menu icon again, and then click Analytics Subscription.

5. Click Create Instance.

6. For Instance Name, enter a name for your service instance. The name must start with a letter and can contain only letters and numbers.

7. For Notification Email, enter the email address of the person you want to notify when this service is ready to use and receive other status updates about this service in the future. This person is usually you, the Cloud Account Administrator who’s setting up the service.

8. If multiple identity domains are available to you, select the Identity Domain that you want this service to use and then enter the name of an existing user in this identity domain that you want to assign as the Service Administrator. You don’t see these options if only one identity domain is available.

9. If several geographical regions are available to you, select the Region where you want to deploy Oracle Analytics Cloud. For example, uk-london–1.

10. If several edition options are available to you, select the Edition that matches the type of service you want to create.

   - Professional
   - Essbase *
   - Enterprise


11. Determine the size of your service.
• To size your service based on how many users you’re entitled to as part of your subscription, set **Subscription Type** to **Number of Users**, and then enter the number of users (between 10 and 3000).

• To size your service based on how many Oracle Compute Units (OCPUs) you’re entitled to as part of your subscription, set **Subscription Type** to **Number of OCPUs**, and then select the number of OCPUs you want.

12. Click **Next**.

13. Verify that the details are correct, and click **Create**.

It takes about 20 minutes to create the service. Oracle sends an email to the designated email address when your service is ready. Display the Activity page to check the current status.

---

**Migrate Users and Roles from Oracle Data Visualization Cloud Service**

Before you migrate your Oracle Data Visualization Cloud Service content to Oracle Cloud Infrastructure, you must migrate users and roles from your traditional Oracle Data Visualization Cloud Service account to Oracle Identity Cloud Service available with your Cloud account.

1. Navigate to the users and roles you want to export from Oracle Data Visualization Cloud Service.
   a. Sign in to your traditional Oracle Cloud account.
   b. Click **Users**.

2. Migrate users (Users tab).
   
   Export user information to a CSV file (**users.csv**) and import the users to Oracle Identity Cloud Service in your target Cloud account.
   
   a. On the **Users** tab, click **Export**.
   
   b. Open **users.csv** to verify it contains the users you want to migrate.
c. Change the User Login column heading to User ID and the Email column heading to Work Email.

At a minimum, the file must have these exact column headings: User ID, Last Name, First Name, Work Email. See Import User Accounts in *Administering Oracle Identity Cloud Service*. You can download a sample file from this topic to verify the format Oracle Identity Cloud Service requires.

d. Add a Password column heading with dummy passwords, if required.

e. Save your changes to the CSV file.

f. In Oracle Identity Cloud Service Console, navigate to the Users tab and click Import.

g. Click Browse to locate and select the CSV file that contains the users you want to import (users.csv).

3. Migrate roles (Roles tab and Custom Roles) and import them as groups on Oracle Identity Cloud Service.

You can't export roles from your traditional account. You must manually create a CSV file that includes any roles in Oracle Data Visualization Cloud Service that you want to migrate, together with their current user assignments. The CSV file you create can include roles and custom roles.

In Oracle Identity Cloud Service, you import these roles and custom roles as groups. The format of the CSV file must match the format that Oracle Identity Cloud Service requires to import groups. At a minimum, the file must have these exact column headings: Display Name, Description, User Members.

In Oracle Analytics Cloud, you see these groups on the Roles tab and then you assign them to the same application role that they had in Oracle Data Visualization Cloud Service.

a. Create a CSV file named Groups.csv.

b. On the Roles tab, locate the predefined roles associated with the Oracle Data Visualization Cloud Service instance you want to migrate, and then copy Display Name, Description, and User Members information to the CSV file. Include:

- `<DVCServicename> BI Cloud Service Administrators`
- `<DVCServicename> BI Cloud Service Advanced Content Authors`
- `<DVCServicename> BI Cloud Service Consumers`

Exclude:

- TenantAdminGroup (Identity Domain Administrator), db_administrator, db_developer, db_user, and other service roles.

c. On the Custom Roles tab, identify any other roles used by the Oracle Data Visualization Cloud Service instance you want to migrate, and then copy Display Name, Description, User Members information to the CSV file.

For example, your Groups.csv file might contain information that looks something like this:
In Oracle Identity Cloud Service Console, use the information you collected in Groups.csv to create the required groups in Oracle Identity Cloud Service.

Navigate to the Groups tab. Create groups with exactly the same names, descriptions, and user assignments as the roles you recorded in Groups.csv. The names are case-sensitive.

See Managing Groups in Administering Oracle Identity Cloud Service.

4. Verify that the users and groups you migrated to Oracle Identity Cloud Service are available in Oracle Analytics Cloud.
   a. Sign-in to Oracle Analytics Cloud and navigate to Console.
   b. Click Users and Roles.
   c. On the Users tab, verify the list of users and check whether users have the correct role (group).
   d. On the Roles tab, verify the list of roles (groups in Oracle Identity Cloud Service) and check whether the correct users are assigned to each role.

5. Grant Oracle Analytics Cloud application roles to the users and groups you migrated to Oracle Identity Cloud Service.
   a. Click the Application Roles tab.
   b. Grant appropriate Oracle Analytics Cloud application roles to the roles that you migrated from Oracle Data Visualization Cloud Service. Refer to the table.

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Description</th>
<th>User Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>mycompany.BICloudServiceAdministrators</td>
<td>Users authorized to administer the service and delegate privileges to others</td>
<td>CBrown</td>
</tr>
<tr>
<td>mycompany.BICloudServiceAdvancedContentAuthors</td>
<td>Users authorized to create and share content</td>
<td>AGold;BJones;DMarks</td>
</tr>
<tr>
<td>mycompany.BICloudServiceConsumers</td>
<td>Users authorized to view and explore content</td>
<td>JSmith;Swasher;TYoung</td>
</tr>
<tr>
<td>SalesManagers</td>
<td>Managers in the Sales organization</td>
<td>AGold;BJones;</td>
</tr>
<tr>
<td>SalesTeam</td>
<td>Members of the Sales organization</td>
<td>AGold;BJones;JSmith;SWasher</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grant Application Role in Oracle Analytics Cloud...</th>
<th>To Each Role You Migrated to Oracle Identity Cloud Service...</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI Service Administrator</td>
<td>&lt;DVCServicename&gt;.BICloudServiceAdministrators</td>
</tr>
<tr>
<td>DV Content Author</td>
<td>&lt;DVCServicename&gt;.BICloudServiceAdvancedContentAuthors</td>
</tr>
<tr>
<td>DV Consumer</td>
<td>&lt;DVCServicename&gt;.BICloudServiceConsumers</td>
</tr>
</tbody>
</table>

Verify Your Service and Sign In

Oracle sends an email to the designated email address when your Oracle Analytics Cloud service is ready. Navigate to your service in Oracle Cloud Infrastructure Console, obtain the service URL, and then sign in to verify your Oracle Analytics Cloud service is up and running.
1. Sign in to your Oracle Cloud account.

2. In Oracle Cloud Infrastructure Console, click Navigation menu icon in the top left corner.

3. Do one of the following:
   - Oracle Analytics Cloud (Universal Credits) - Under Solutions and Platform, select Analytics, and then click Analytics Cloud. Select the compartment in which you created the service, the name of the new service, and then click Open URL. See Verify Your Service.
   - Oracle Analytics Cloud Subscription - Under More Oracle Cloud Services, select Platform Services, and then click Analytics Subscription. Click Manage this instance for your service, and then click Oracle Analytics Cloud Subscription URL. See Verify Your Service.

4. Sign in with your administrator credentials.
# Migrate Your Oracle Data Visualization Cloud Service Instances

When your target environment is ready, capture the information you want to migrate in a snapshot and copy it to Oracle Analytics Cloud on Oracle Cloud Infrastructure.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
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<td>Understand what you can include or exclude when you take a snapshot.</td>
<td>Understand Snapshot Options</td>
</tr>
<tr>
<td>Check that your target is ready for migration and take a backup</td>
<td>Verify that the required users and roles are available in your target service and take a snapshot in case you need to roll back.</td>
<td>Back Up Your Target Service Before Migration</td>
</tr>
<tr>
<td>Take a snapshot of the source</td>
<td>Capture the content you want to migrate on the source system.</td>
<td>Take a Snapshot on the Source</td>
</tr>
<tr>
<td>Download the snapshot</td>
<td>Download the snapshot that you want to migrate to your local file system.</td>
<td>Download the Snapshot</td>
</tr>
<tr>
<td>Upload the snapshot to the target</td>
<td>Sign in to the target system and upload the snapshot.</td>
<td>Upload the Snapshot on the Target</td>
</tr>
<tr>
<td>Restore the snapshot content</td>
<td>Select the newly uploaded snapshot in the list of saved snapshots and restore the content in the snapshot. After restoring the snapshot you must perform additional tasks to complete the migration. For example, you must migrate data files, verify application role assignments, and more.</td>
<td>Restore the Snapshot on the Target</td>
</tr>
<tr>
<td>Migrate data files</td>
<td>Use the Data Migration utility to migrate and restore data files from another environment.</td>
<td>Migrate File-based Data</td>
</tr>
<tr>
<td>Verify application role assignments</td>
<td>Verify that users and groups in your target service have the correct application roles in Oracle Analytics Cloud.</td>
<td>Verify and Configure Service Settings</td>
</tr>
<tr>
<td>Reconfigure search crawl users</td>
<td>Change the name of the users configured to index catalog content.</td>
<td>Verify and Configure Service Settings</td>
</tr>
<tr>
<td>Verify and configure service settings</td>
<td>Check that your safe domains are configured correctly. Optionally, configure new options of your service, such as a virus scanner, or maps and extensions for your data visualizations.</td>
<td>Verify and Configure Service Settings</td>
</tr>
</tbody>
</table>

## Understand Snapshot Options

When you take a snapshot in Oracle Data Visualization Cloud Service you capture everything in your environment. When you restore the snapshot on Oracle Analytics...
Cloud you can restore everything in the target Oracle Analytics Cloud or only restore the content in the snapshot.

- **Replace Everything** - Replaces your entire environment using information in the snapshot.
  Any content type excluded from the snapshot is restored to its default state in the target environment, that is, "no content". For example, if you decided to set up a virus scanner before restoring the snapshot, the new virus scanner configuration is removed.

  There are some exceptions; if the snapshot doesn't contain any file-based data sets, plug-ins, or extensions these items are left unchanged in Oracle Analytics Cloud.

- **Replace Snapshot Content Only** - Everything that's in the snapshot is restored.
  Any content type excluded from the snapshot remains unchanged in the target environment.
  For example, if you set up a virus scanner before restoring the snapshot, your virus scanner configuration remains.

- **Custom** - You select the content you want to restore. If you don't want to restore certain content types, exclude them before you restore.

**Back Up Your Target Service Before Migration**

Verify that your target Oracle Analytics Cloud is ready for migration and then take a snapshot in case you need to roll back the service to its pre-migration state.

1. Sign-in to the target Oracle Analytics Cloud.
2. Verify that the users and roles you imported to Oracle Identity Cloud Service are available.
   a. Navigate to **Console**, and click **Users and Roles**.
   b. Click the **Users** tab and then the **Roles** tab to verify the users and roles.
3. Take a backup of the target Oracle Analytics Cloud.
   a. Navigate to **Console**, and click **Snapshots**.
   b. Click **Create Snapshot**.
   c. For description, enter "Snapshot before content migration" or something similar.
   d. Select **Everything**, and then click **Create**.

**Migrate Your Content**

Capture the content you want to migrate in a snapshot and restore that snapshot on your target Oracle Analytics Cloud.

1. Sign-in to the source Oracle Data Visualization Cloud Service.
2. Save the entire environment you want to migrate to a snapshot.
   a. Navigate to **Console**, click **Snapshots**, and then **New Snapshot**.
   b. For **Description**, enter "Migrate content to Oracle Cloud Infrastructure" or something similar.
3. Download the snapshot locally.
   a. Select the snapshot that you want to download.
   b. Click the Manage Snapshot menu, and select Download.
      You're asked to create a password for the snapshot. Don't forget this password. You'll need this password when you upload the snapshot on the target system.
   c. Enter and confirm a password for the snapshot. The password must contain at least 8 characters.
   d. Click OK.
      The snapshot downloads as an Oracle Business Intelligence archive file (.bar).

4. Sign-in to the target Oracle Analytics Cloud and upload the snapshot.
   See Upload the Snapshot on the Target.

5. Restore the snapshot, and select Replace Everything.
   See Restore the Snapshot on the Target.

   After restoring the snapshot you must perform additional tasks to complete the migration. For example, you must verify application and roles, and configure various settings.

6. Migrate data files manually if the restore process fails to migrate them.
   See Migrate File-based Data.

7. Verify application role assignments and other system settings.
   See Verify and Configure Service Settings.

---

**Migrate File-based Data**

Users upload data files, such as spreadsheets, to Oracle Data Visualization Cloud Service to create data sets. When you migrate to a new Oracle Analytics Cloud environment, you can take this file-based data with you. Oracle Analytics Cloud offers a Data Migration utility that enables you to move your data files to the new location. The Data Migration utility also moves any map-related plug-ins and extension files that users might upload for their data visualizations.

The Data Migration utility allows you to move data files directly from one environment to another in a single step. Or if you prefer, you can download your file-based data to a ZIP file and then upload the data files to your chosen environment in two separate steps.

1. Check your environment details.
   - Verify that the source Oracle Data Visualization Cloud Service and the target Oracle Analytics Cloud both use the latest version (5.3 or later). The Data Migration utility isn't available in earlier versions.
     If you're not sure, ask your Oracle representative.
   - Check that the source and target system are both up and running, and Oracle Analytics Cloud is configured with valid storage credentials.
• Check your local environment. You need Java 1.8 or later to run the migration utility.

• Make sure you can access the source environment and the target Oracle Analytics Cloud from the local environment where you plan to run this utility.

• Verify the name and location of the snapshot you downloaded earlier that contains your file-based data. For example, /tmp/20190307095216.bar.

2. Download the Data Migration utility.
   a. In your target Oracle Analytics Cloud, click **Console** and then click **Snapshots**.
   b. Click the Page menu, select **Migrate**, then **Download Data Migration Utility**. Follow the instructions to save the migrate-oac-data.zip file locally.


   The ZIP file contains three files:
   - migrate-oac-data.jar
   - config.properties
   - readme

4. If you want to migrate data files stored in your source environment directly to the target in a single step, configure the section `[MigrateData]` in `config.properties`.

   ```
   [MigrateData]
   # Migrate data files from a source Oracle Data Visualization Cloud Service environment (DVCS) to a target Oracle Analytics Cloud environment.
   # Specify the source environment as Oracle Data Visualization Cloud Service.
   SOURCE_ENVIRONMENT=DVCS
   # Source Oracle Data Visualization Cloud Service URL. For example:
   # https://sourcehost.com:443 or http://sourcehost.com:9704
   SOURCE_URL=http(s)//<Source Oracle Data Visualization Cloud Service Host>:
   # Name of a user with Administrator permissions in the source environment. For example: SourceAdmin
   SOURCE_USERNAME=<Source Administrator User Name>
   # Location of the source BAR file. For example: /tmp/20190307095216.bar
   BAR_PATH=<Path to Source BAR File>
   # Target Oracle Analytics Cloud URL. For example: https://targethost.com:443 or http://targethost.com:9704
   TARGET_URL=http(s)//<Target Oracle Analytics Cloud Host>:
   # Name of a user with Administrator permissions in the target environment. For example: TargetAdmin
   TARGET_USERNAME=<Target Administrator User Name>
   ```
5. If you want to first download data files from your source Oracle Data Visualization Cloud Service to your local environment and subsequently upload the data files to the target Oracle Analytics Cloud environment, configure sections [DownloadDataFragments] and [UploadDataFragments] in config.properties.

[DownloadDataFragments]
# Download Data Files: Download data files from Oracle Data Visualization Cloud Service storage to a local repository.
# Specify the source environment as Oracle Data Visualization Cloud Service.
SOURCE_ENVIRONMENT=DVCS
# Source Oracle Data Visualization Cloud Service URL. For example: https://sourcehost.com:443 or http://sourcehost.com:9704
SOURCE_URL=http(s)://<Source Oracle Data Visualization Cloud Service Host>:<Source Port>
# Name of a user with Administrator permissions in the source environment. For example: SourceAdmin
SOURCE_USERNAME=<Source Administrator User Name>
# Location of the source BAR file. For example: /tmp/20190307095216.bar
BAR_PATH=<Path to Source BAR File>
# Local data file directory. Make sure you have enough space to download the data files to this directory. For example: /tmp/mydatafiledir
DATA_FRAGMENTS_DIRECTORY=<Data Files Directory>
# Data fragment size. Data files are downloaded in fragments. Default fragment size is 500MB.
MAX_DATA_FRAGMENT_SIZE_IN_MB=500

[UploadDataFragments]
# Upload data files: Upload data files to the target Oracle Analytics Cloud.
# Target Oracle Analytics Cloud URL. For example: https://targethost.com:443 or http://targethost.com:9704
TARGET_URL=http(s)://<Target Oracle Analytics Cloud Host>:<Target Port>
# Name of a user with Administrator permissions in the target environment. For example: TargetAdmin
TARGET_USERNAME=<Target Administrator User Name>
# Local directory containing the data files you want to upload. For example: /tmp/mydatafiledir
DATA_FRAGMENTS_DIRECTORY=<Data Files Directory>
# Location of the source BAR file. For example: /tmp/20190307095216.bar
BAR_PATH=<Path to Source BAR File>

6. Run the migrate-oac-data.jar file in your local environment.
   Syntax:
Where:

- **-config configfile**: Name of the config.properties file
- **-d**: Downloads data locally using information in config.properties
- **-help**: Displays help
- **-m**: Migrates data using source and target information in the config.properties file
- **-u**: Uploads data using information in the config.properties file

For example, to migrate data files in a single step:

```
java -jar migrate-oac-data.jar -m -config config.properties
```

For example, to download data files locally:

```
java -jar migrate-oac-data.jar -d -config config.properties
```

For example, to upload data files:

```
java -jar migrate-oac-data.jar -u -config config.properties
```

7. Sign in to your target Oracle Analytics Cloud.

8. To expose the data files in Oracle Analytics Cloud, you must restore the snapshot that you used to migrate your content for a second time. This time, you must select the **Custom** restore option.
   a. Open the Console, and click **Manage Snapshots**.
   b. Select the snapshot containing your data files.
   c. Select the **Custom** restore option, and then select the option **File-based data**. Deselect all other options.
   d. Click **Restore**.

9. Verify that your data files are available.

### Verify and Configure Service Settings

Many settings are migrated for you. Take some time to review various configuration options on the target Oracle Analytics Cloud and reconfigure settings, if required.

1. Sign in to the target Oracle Analytics Cloud and navigate to **Console**.

2. Verify that all the application roles that you want are available and they’re assigned to the correct users and roles.
   a. In Console, click **Users and Roles**.
   b. Click **Application Roles**.
      
      See Add Members to Application Roles.

3. Reconfigure search crawl users.
The user name that is configured immediately after migration includes the tenancy prefix required for Oracle Data Visualization Cloud Service. You must remove the tenancy prefix because this isn't required in Oracle Analytics Cloud.

a. In Console, click Search Index.

b. On the Catalog tab, click the Set User search icon for the User to Run Crawl As field, and select the name of a user with administrative permissions in Oracle Analytics Cloud.

   For example, you might change the user name from <Tenancy>.MyAdminUser to MyAdminUser. If you prefer, you can select the name of a different user.

4. In Console, click Safe Domains to verify your safe domains are configured.

   See Whitelist Safe Domains.
Complete the Post-Migration Tasks

After successfully migrating your Oracle Data Visualization Cloud Service content to Oracle Cloud Infrastructure, test your new Oracle Analytics Cloud instance thoroughly, and then perform cleanup and other optional configuration tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test the migrated service</td>
<td>Check that the content you migrated is available on Oracle Cloud Infrastructure and everything works as you expect.</td>
<td>Test the Migrated Service Instance</td>
</tr>
<tr>
<td>Clean up services on Oracle Cloud Infrastructure Classic</td>
<td>Remove any resources that you don't need.</td>
<td>Clean Up Infrastructure and Platform Resources in Oracle Data Visualization Cloud Service</td>
</tr>
</tbody>
</table>

Test the Migrated Service Instance

After migrating your Oracle Data Visualization Cloud Service instance to Oracle Cloud Infrastructure, test your service thoroughly to ensure it's production-ready.

1. Navigate to the Projects page, then open some data visualization projects you're familiar with to make sure the visualizations display the correct data.
2. Navigate to the Data page.
   a. Verify your data sets.
   b. Check connection details.

Clean Up Infrastructure and Platform Resources in Oracle Data Visualization Cloud Service

After testing your Oracle Analytics Cloud instance on Oracle Cloud Infrastructure you can delete the source Oracle Data Visualization Cloud Service instance and any other supporting resources in Oracle Cloud Infrastructure Classic. Remove these resources from Oracle Cloud Infrastructure Classic to avoid costs for services that you no longer use.

1. Delete the Oracle Data Visualization Cloud Service instance.
   1. Sign in to your traditional Oracle Cloud account, and navigate to the Oracle Data Visualization Cloud Service Details page.
   2. Click Action Menu for the instance you migrated, and then select Delete.
   3. When prompted for confirmation, click Delete.