

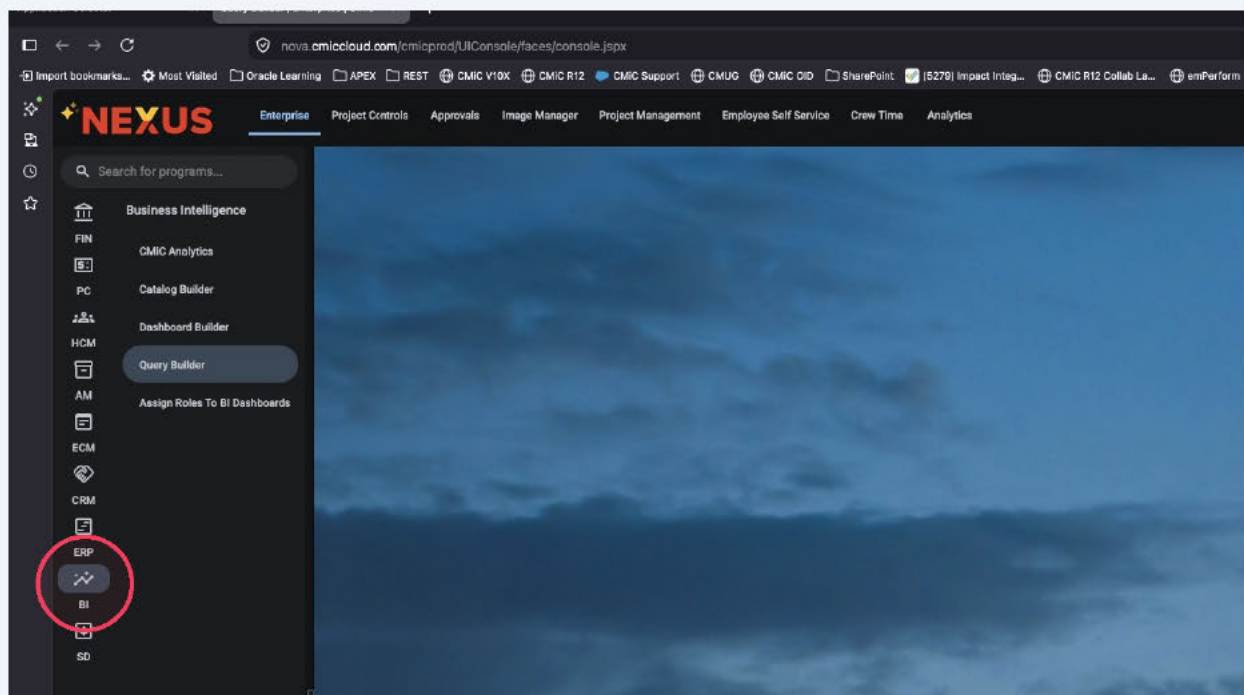
Importing a CMiC BI Query to a Different Data Source



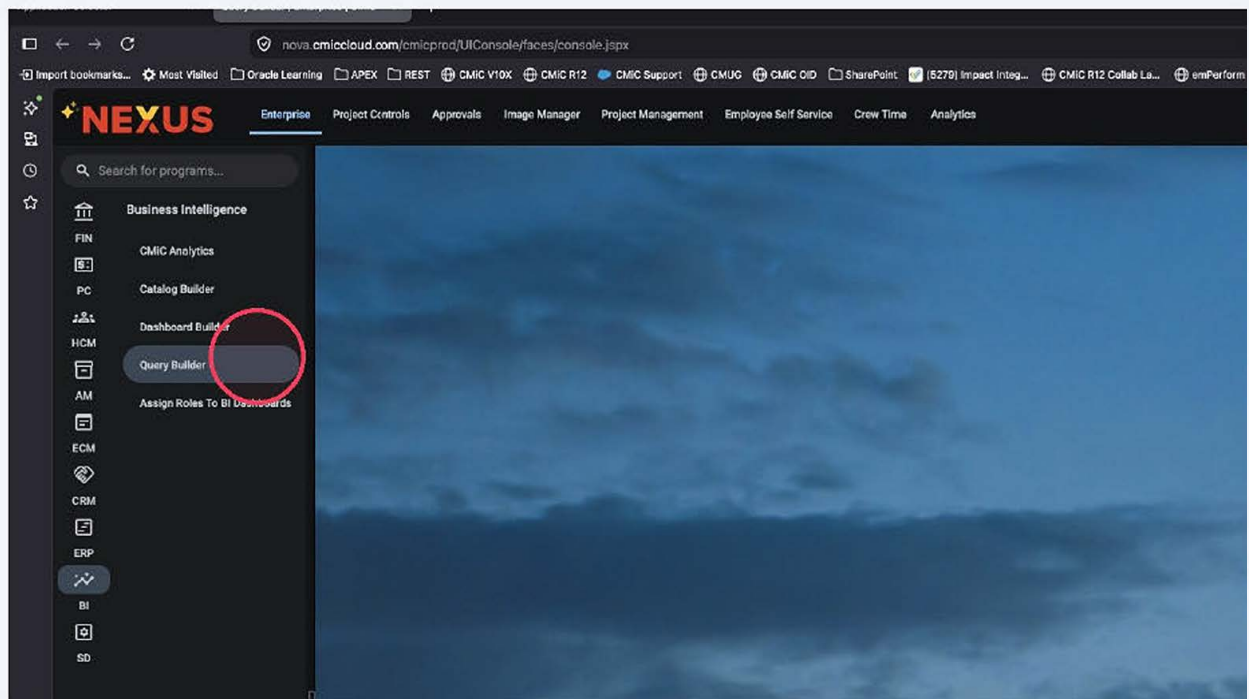
This guide shows how to export a BI query from CMiC, import it, and reassign it to a different data source. Follow it to preserve query configuration while switching environments, avoid rebuilding queries from scratch, and ensure the query points to the correct dataset. It's useful for migrations, testing, or sharing queries across projects.

Open Query Builder

1 Click "BI"

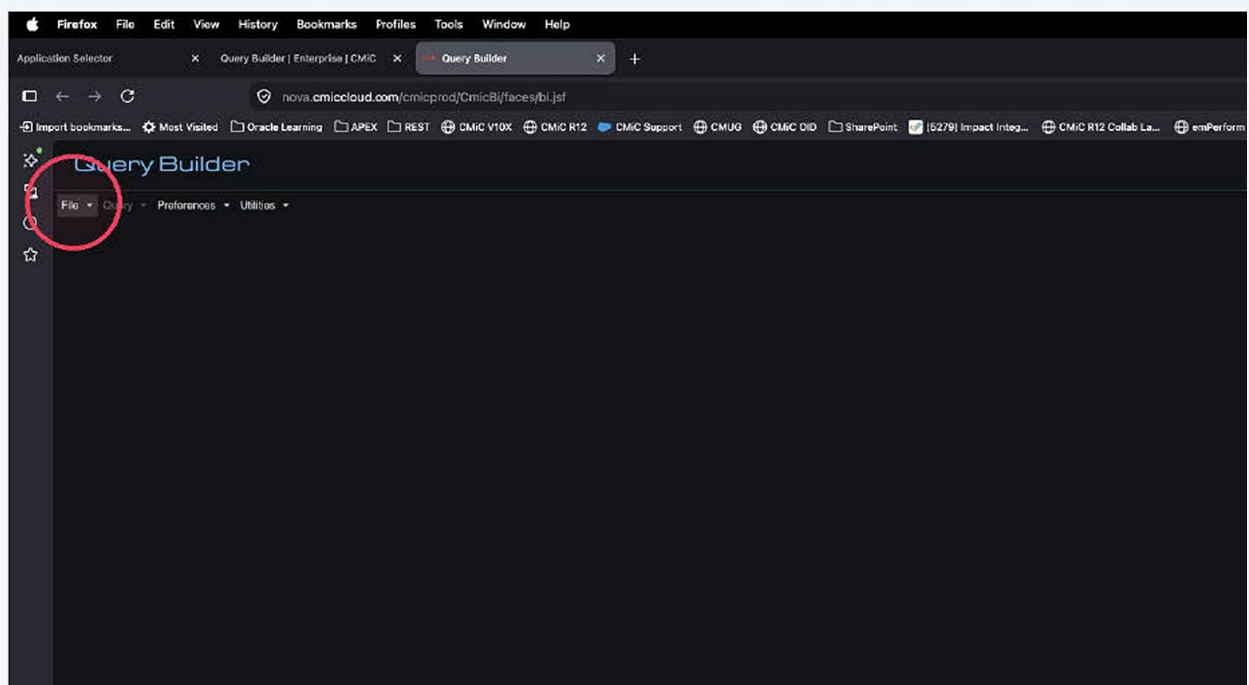


2 Click "Query Builder"

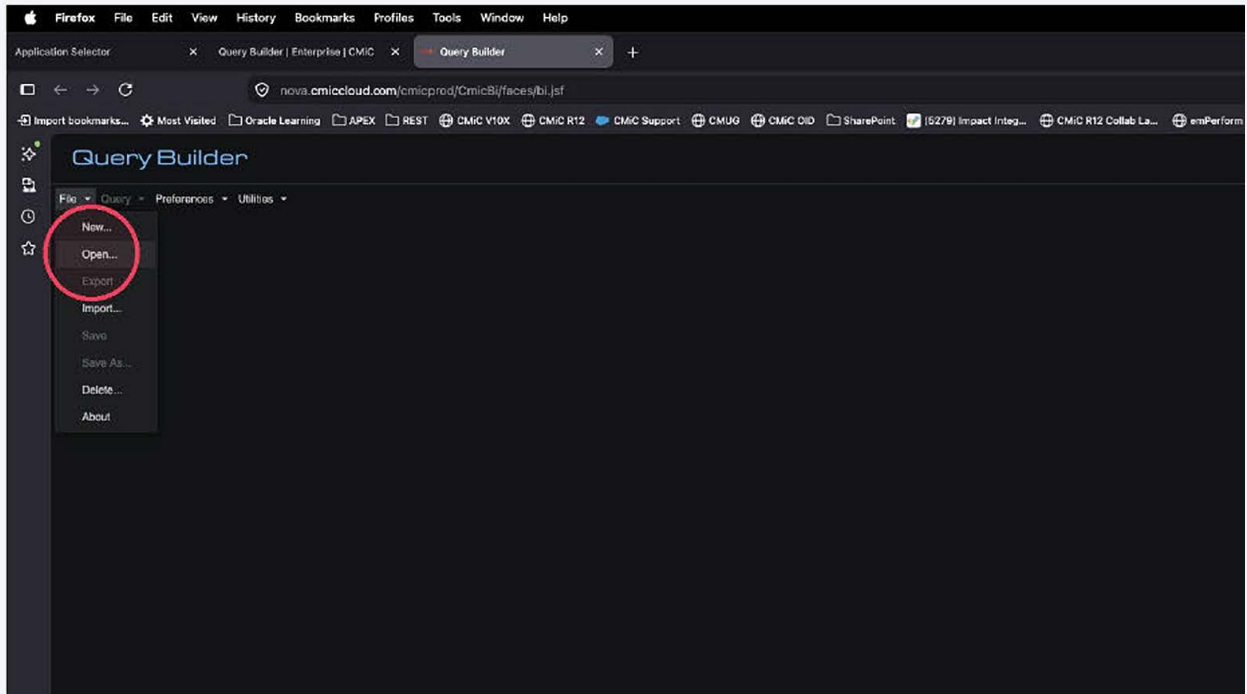


Export Original BI Query

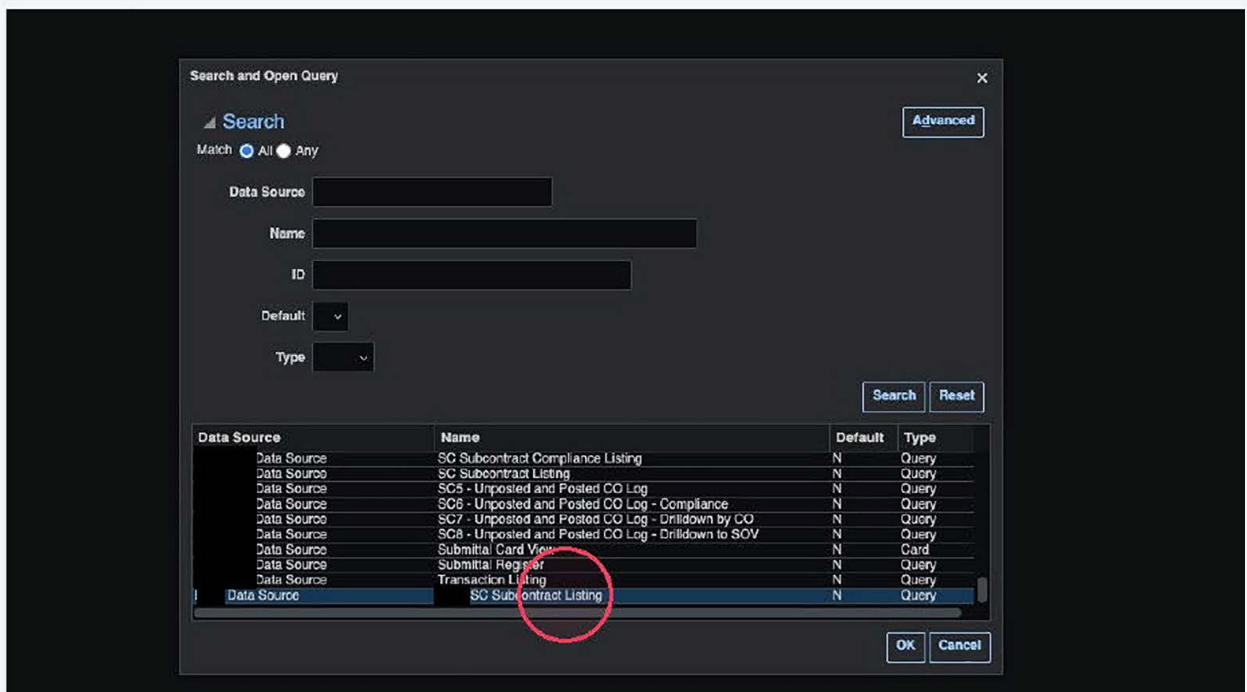
3 Click "File"



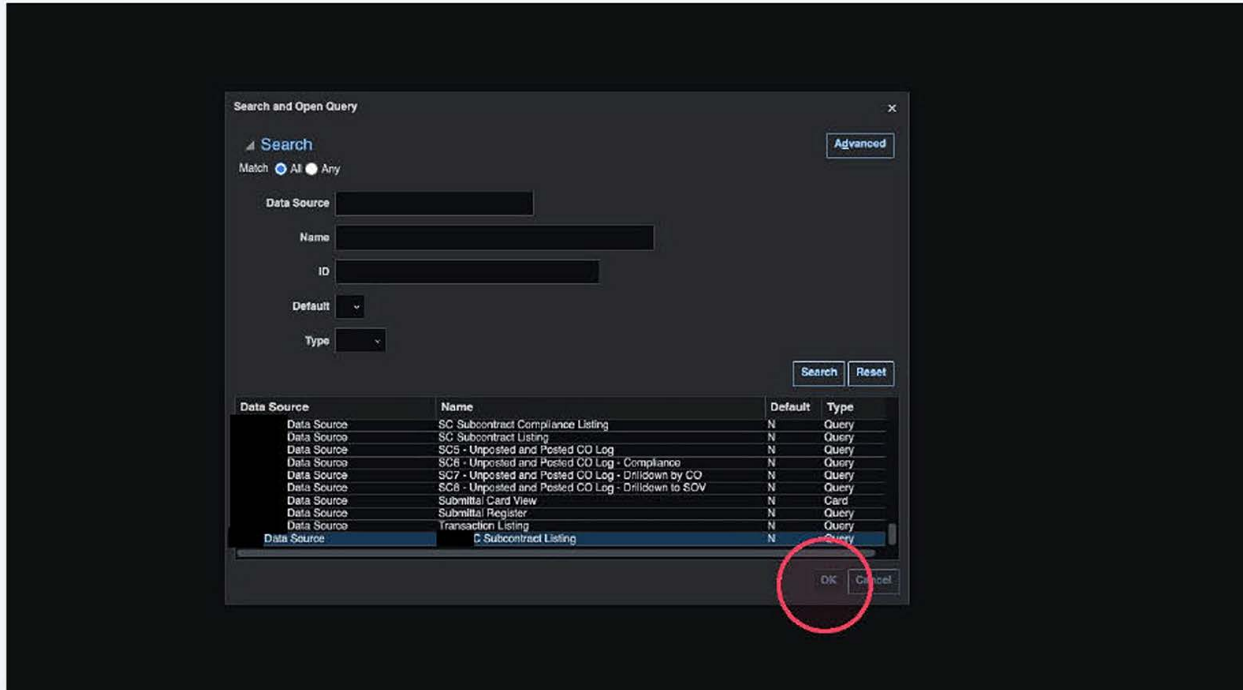
4 Click "Open..."



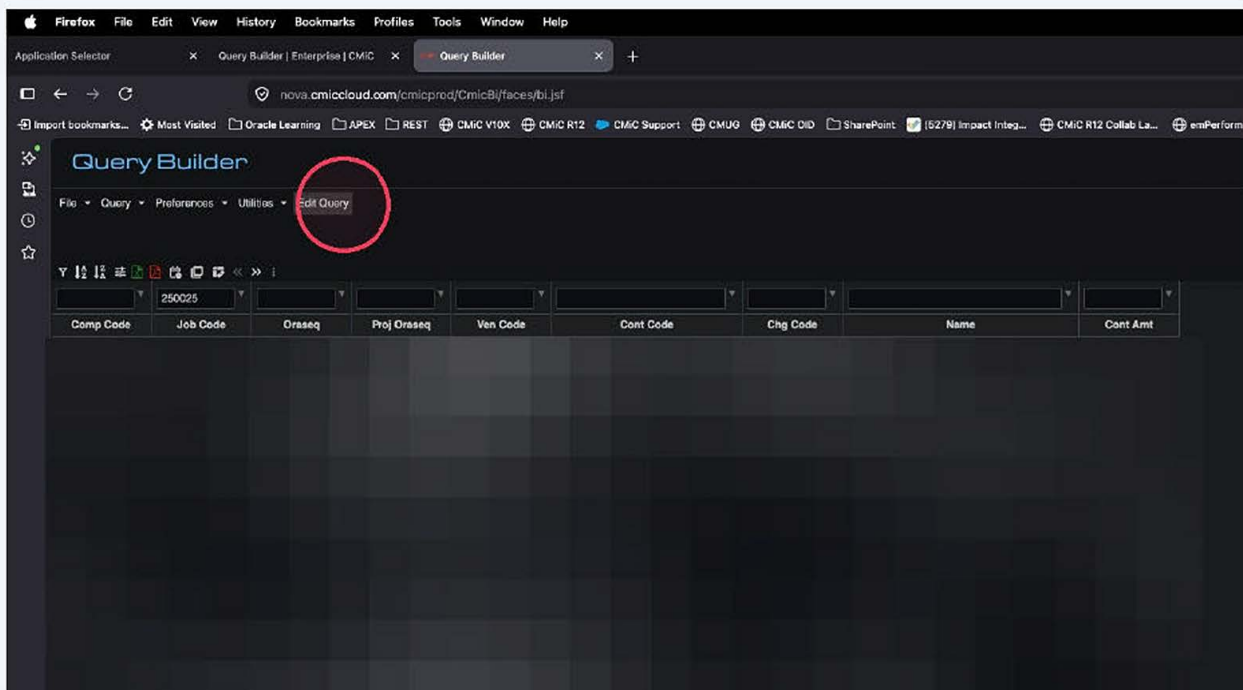
5 Click on the desired query



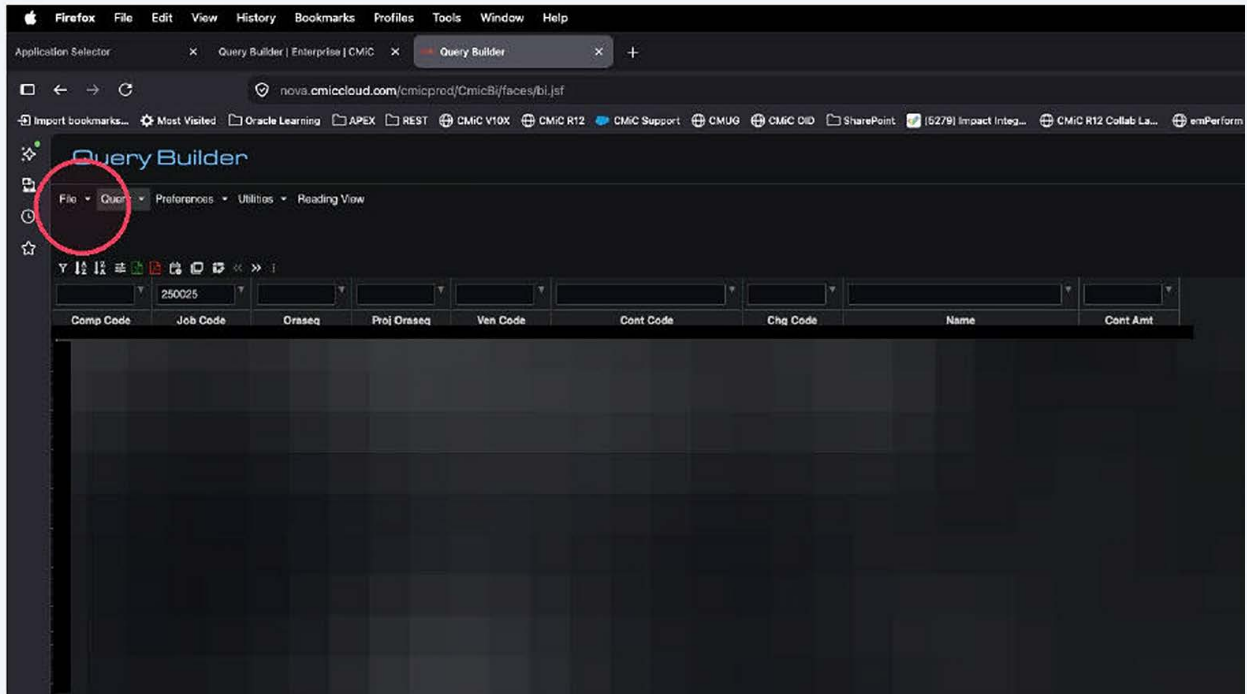
6 Click "OK"



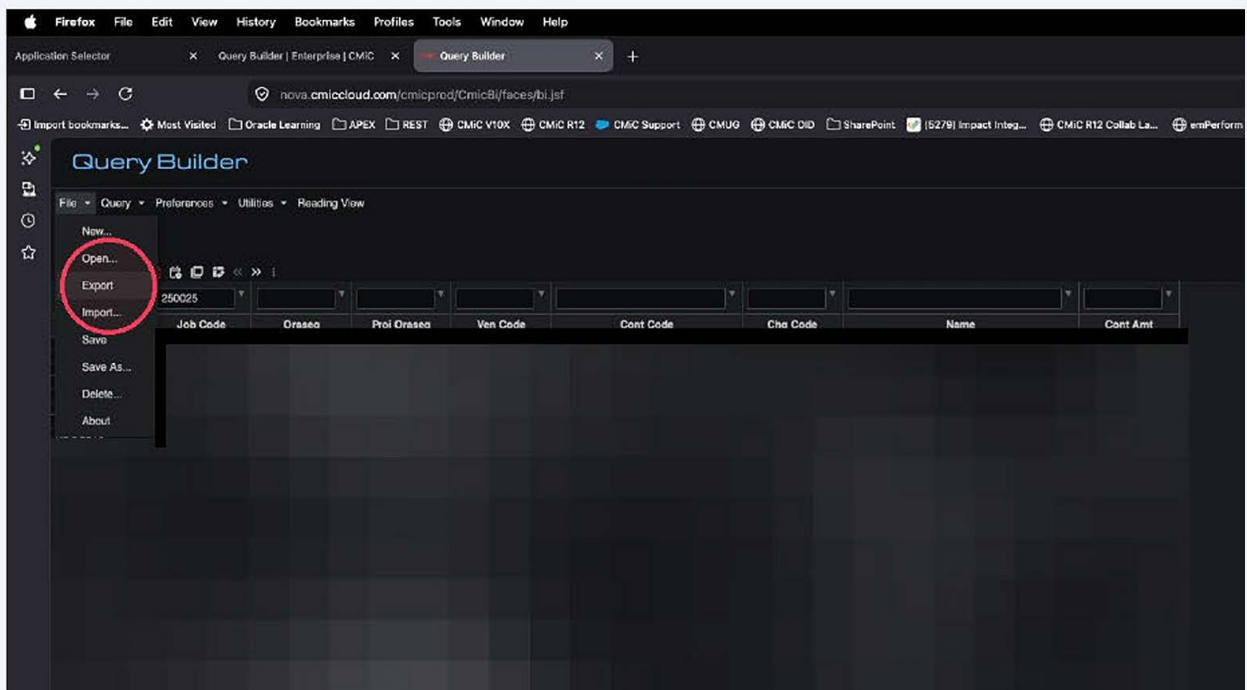
7 Click "Edit Query"



8 Click "File"

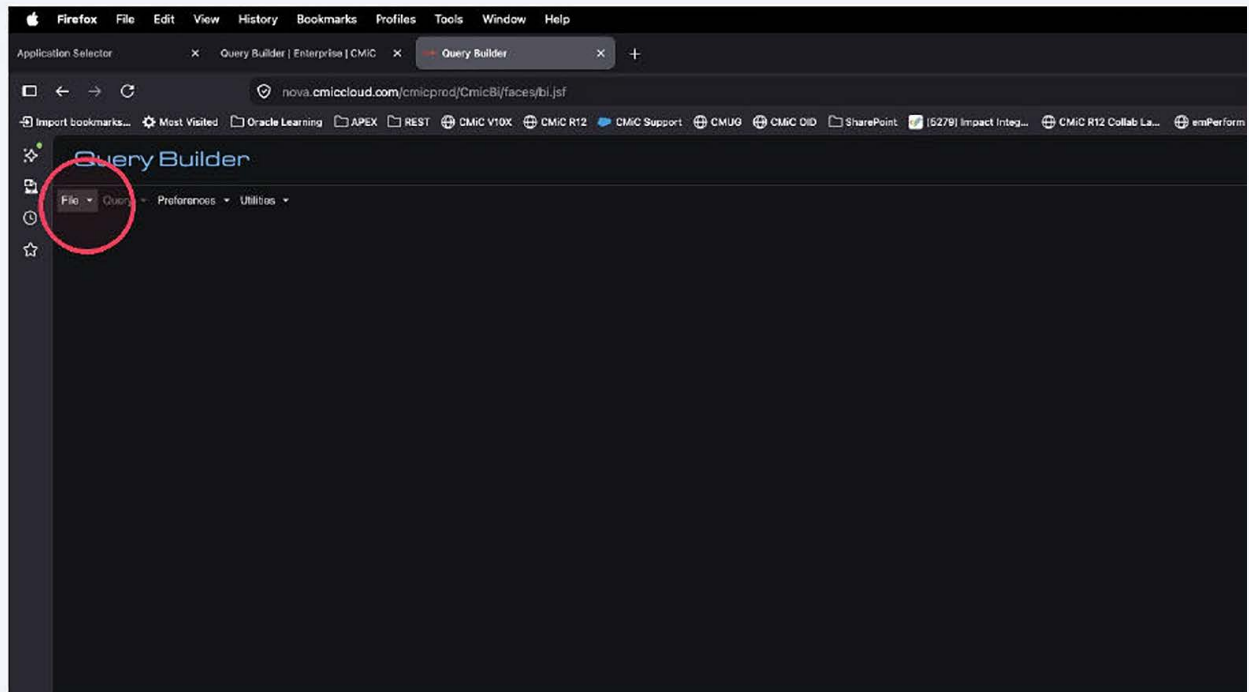


9 Click "Export"

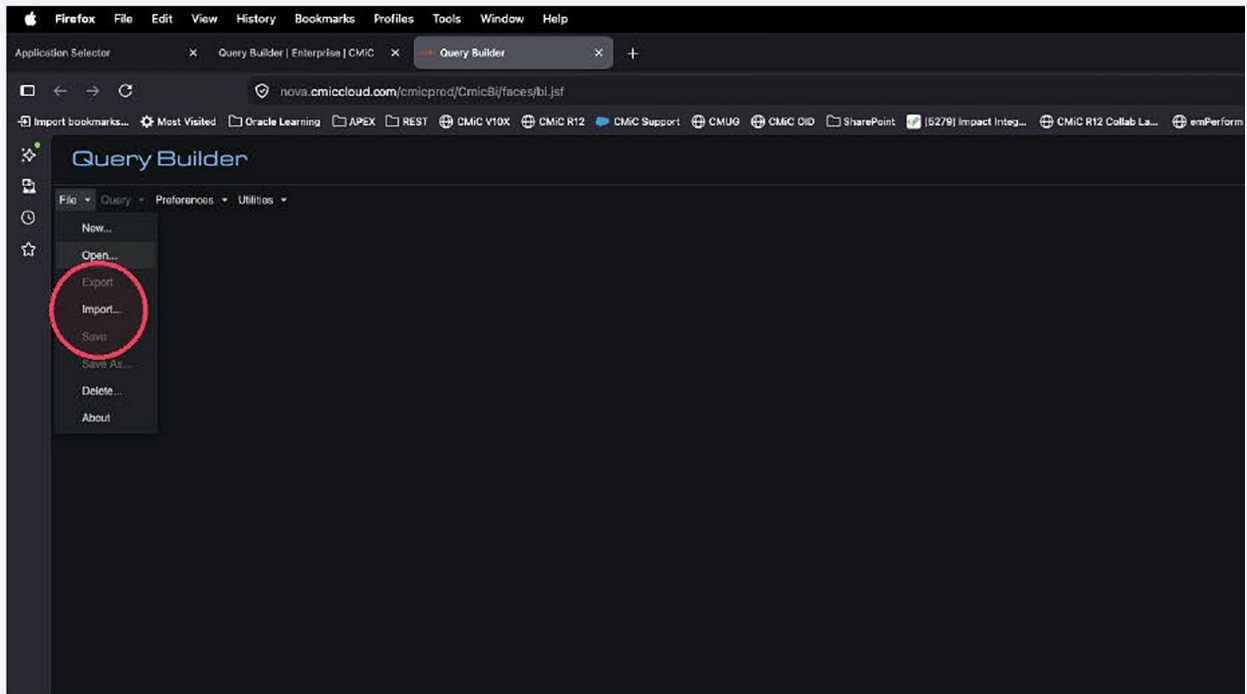


Import BI Query

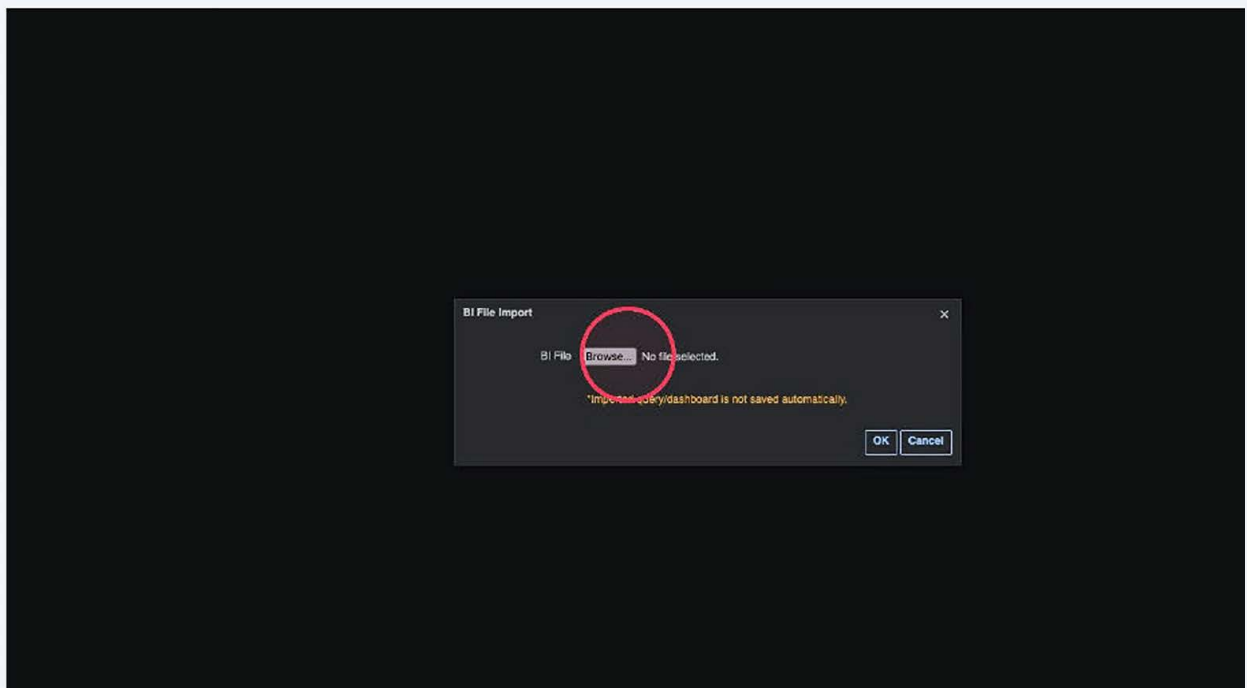
10 Click "File"



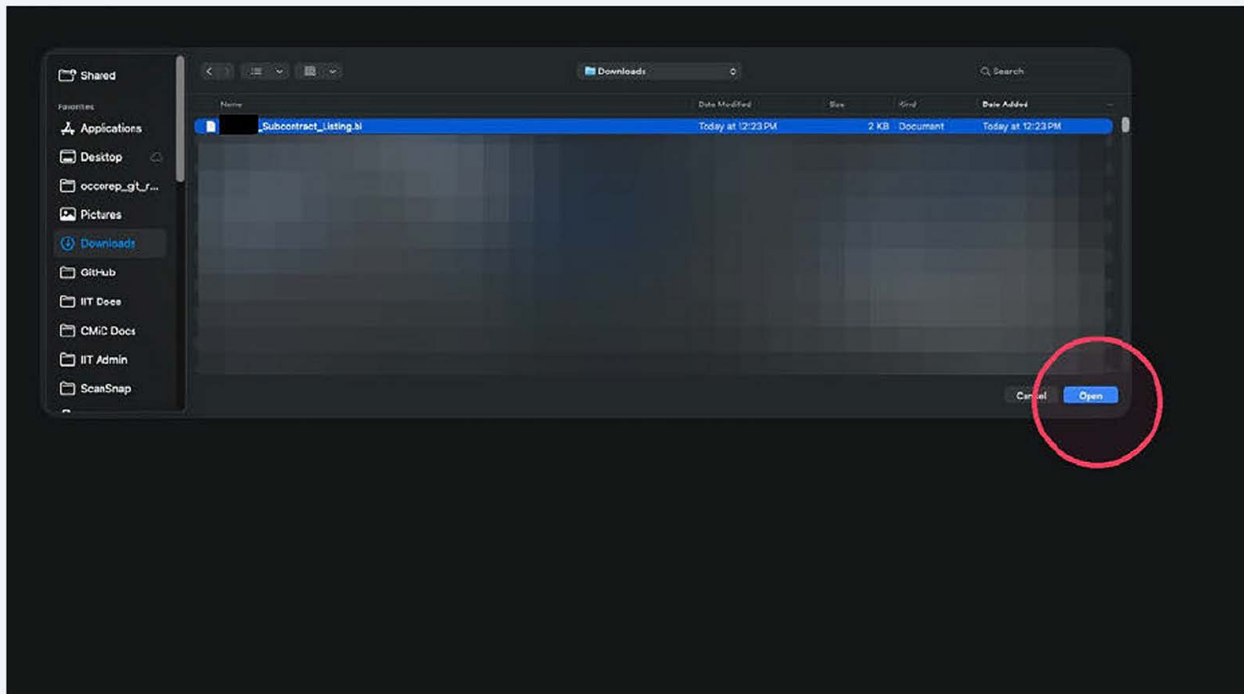
11 Click "Import"



12 Click "Browse..."

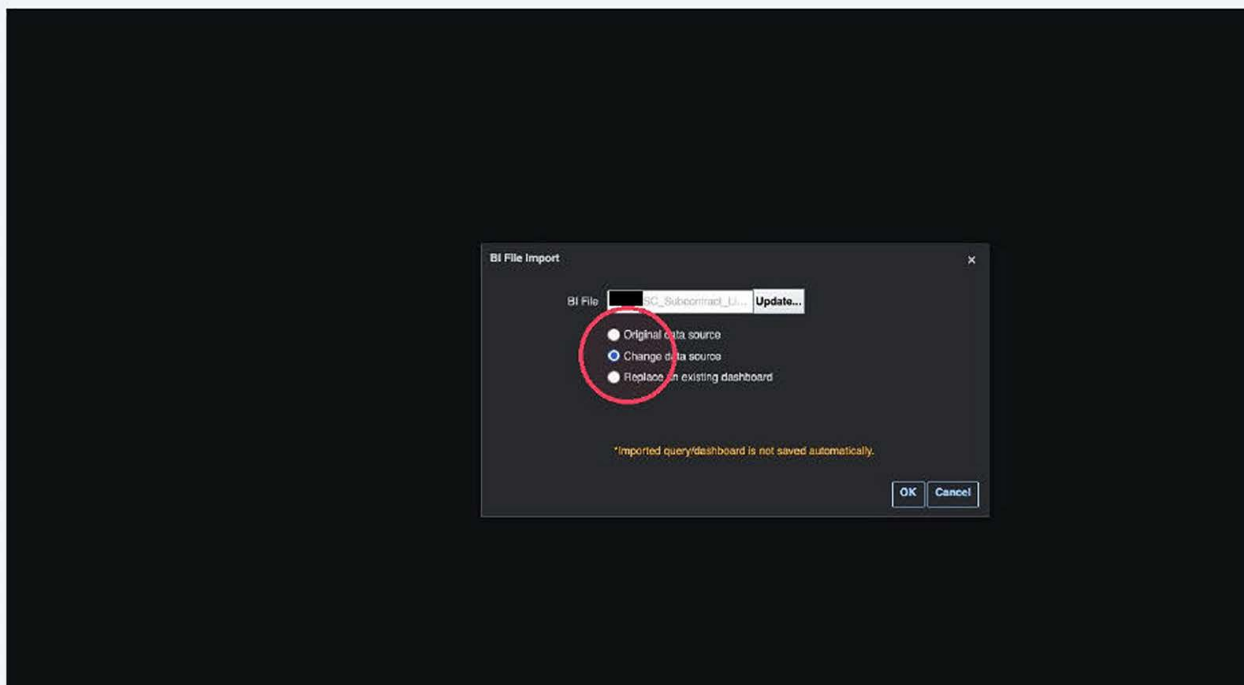


13 Double-click "text field"



Change Data Source

14 Click "Change data source"



If the data source isn't listed — or the import returns an error instead

Both symptoms have the same cause, and rebuilding the data source by hand will not resolve either one. Read the next page before continuing to Step 15.

When the Data Source Is Missing or the Import Returns an Error

Steps 15 to 18 assume the destination data source is there to be picked. Two things can happen instead. You clear the Name field, search again, and what you need is still absent from the results. Or the import never reaches that point at all and simply returns an error. Both trace back to the same cause.

CMiC identifies a data source by a generated ID, not by the name shown on screen. When a query is exported, that ID travels inside the **.bi** file. The file is requesting one particular data source by number — not any data source that happens to carry a given name.

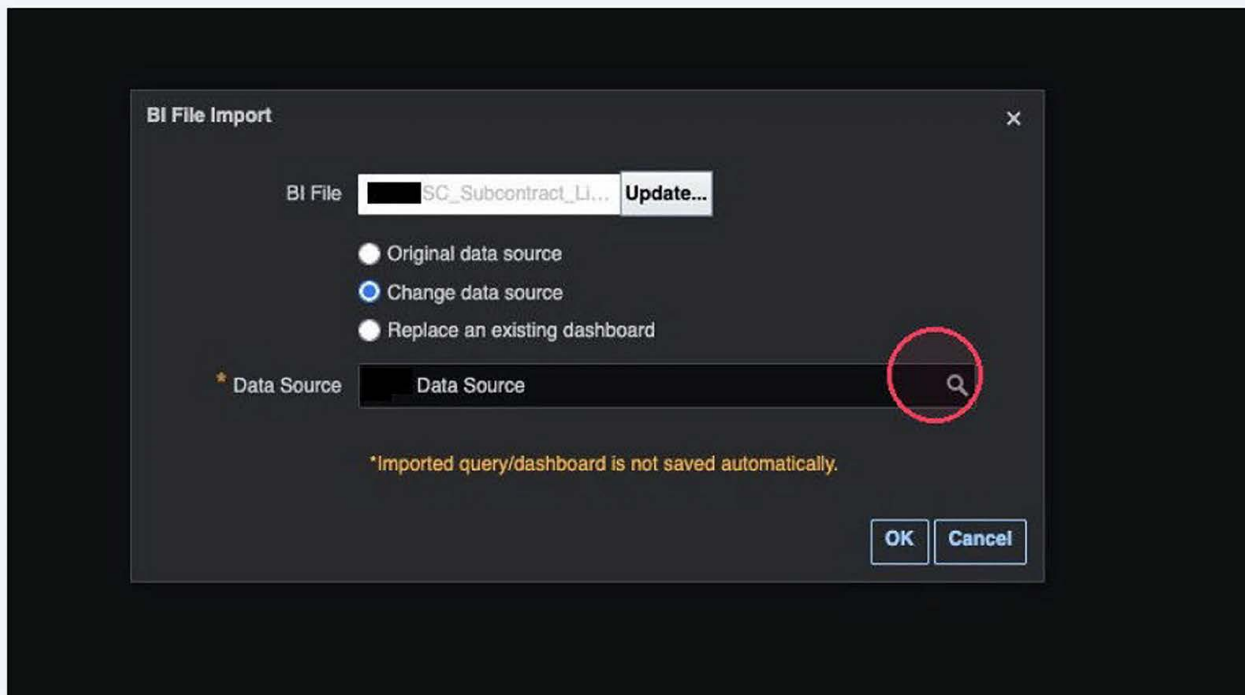
A data source assembled by hand in the target environment receives an ID of its own. Matching the name exactly and mirroring every property does not change that. From there, the behaviour varies: the system may leave it out of the selection list, or it may reject the import outright and never offer a choice. Neither outcome tells you what is actually wrong.

Move the data source across rather than reconstructing it. **Catalogue Builder** will export a data source from one environment and load it into another with its identity preserved. With the same ID present on both sides, the query file finds what it expects and imports without complaint.

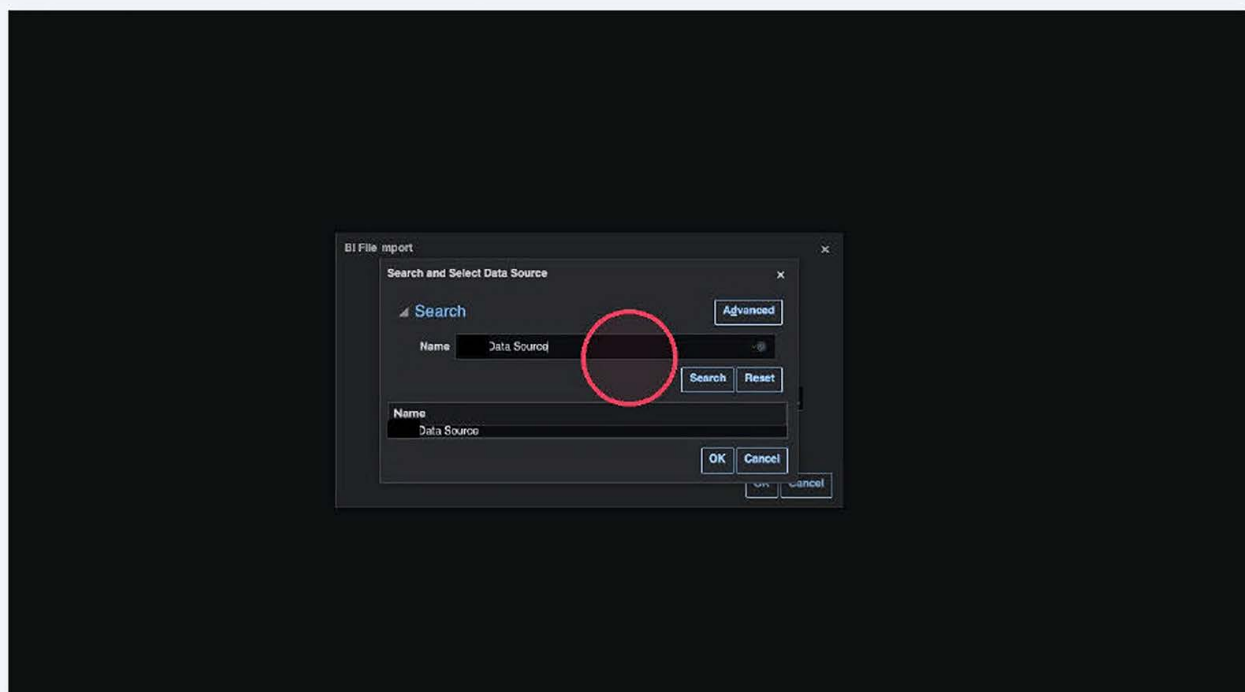
Sequence matters: the data source has to reach the destination before the query does.

Once the data source is in place, return to Step 15 and continue. If the import still errors after the IDs match, the problem lies elsewhere and is worth raising with CMiC Assist.

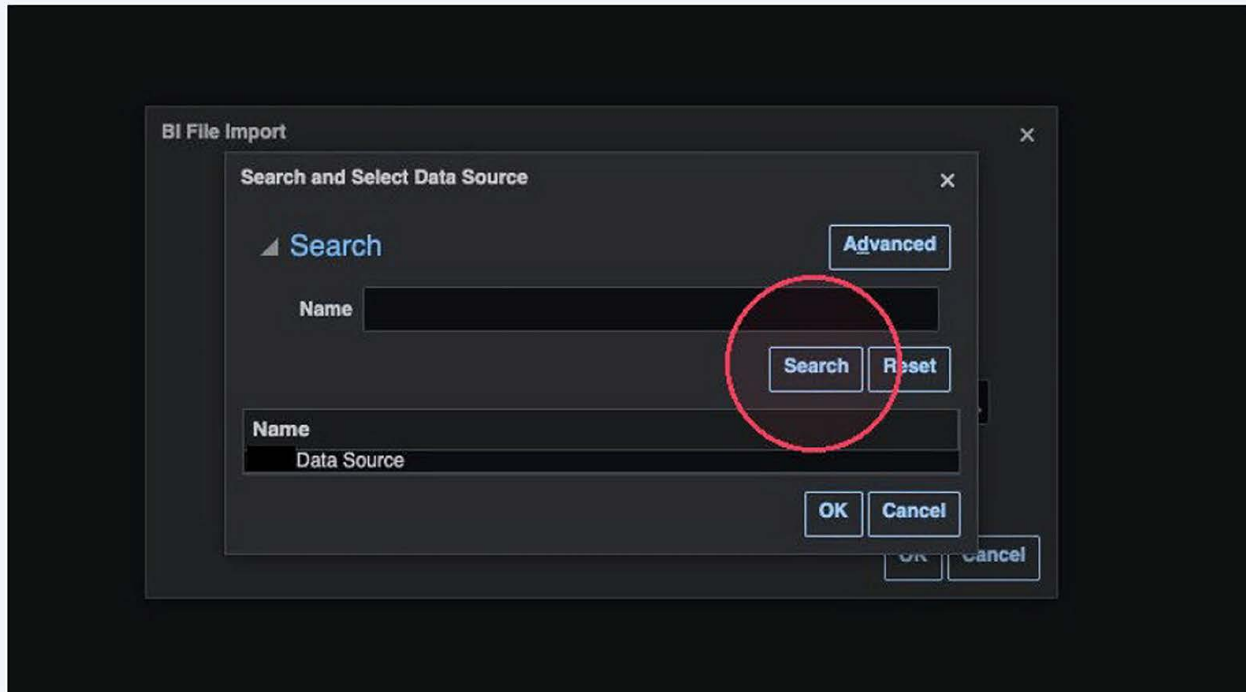
- 15 Click the magnifying glass icon to select a different data source



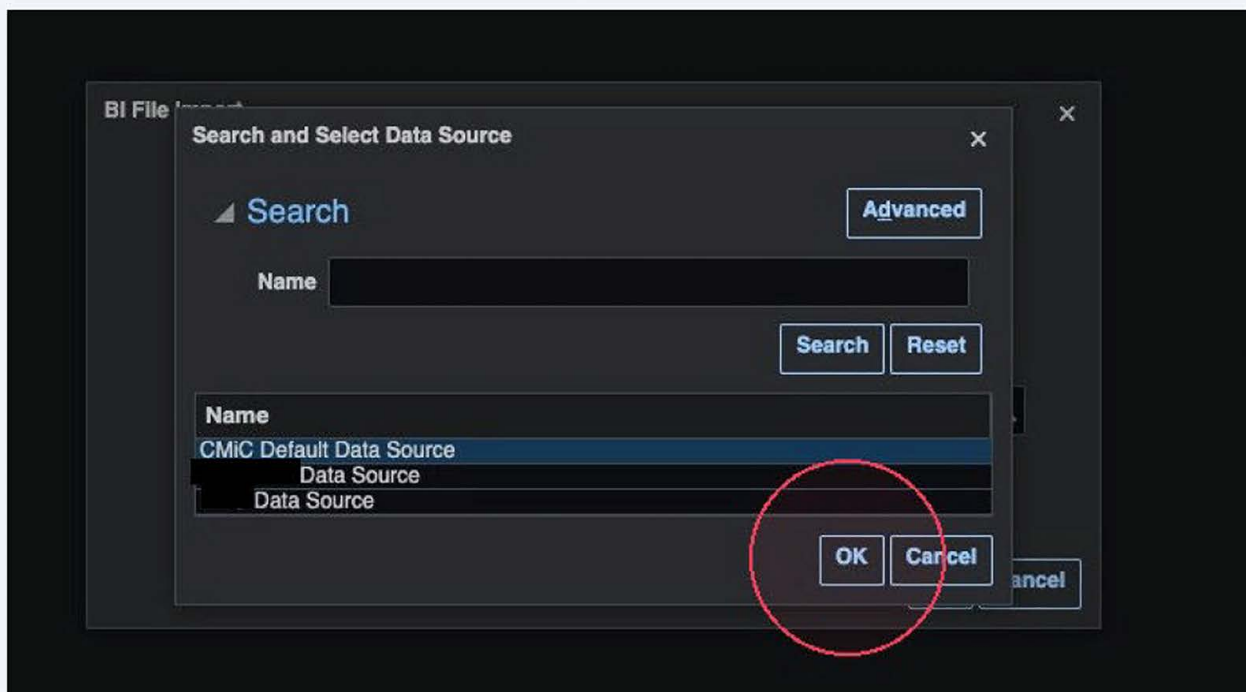
- 16 Click "Name"



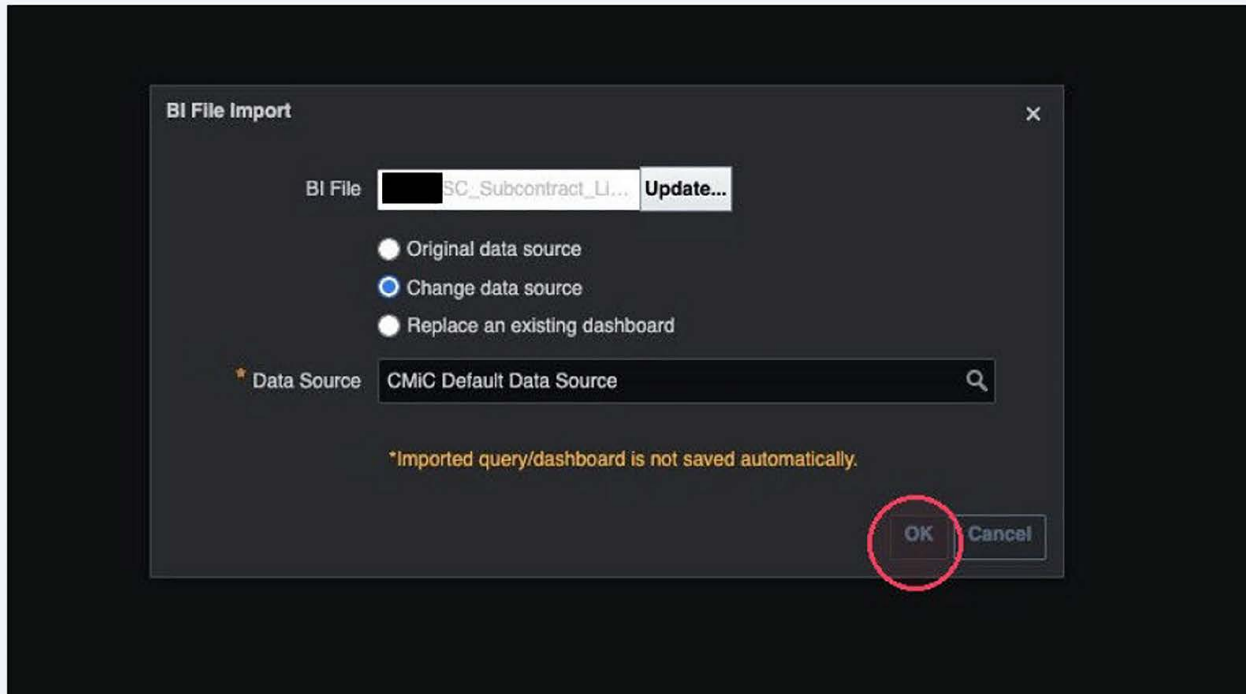
- 17 Delete the text in the "Name" field and click "Search"



- 18 Click the desired destination data source and click "OK"



19 Click "OK"



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