BI Migration

Data & Analytics

Persistent Structure - Digital Engineering has been the bedrock of our growth

Across industry verticals powered by service lines

Service Lines

- Digital Strategy & Design
- Software Product Engineering
- CX Transformation
- Cloud & Security
- Intelligent Automation
- Data & Analytics
- Enterprise Integration

Industries

Software and Hi-Tech

Banking

Financial Services

Insurance

Healthcare

Lifesciences

Consumer

Retail

Logistics

Enabling functions

CTO Office

Driving Innovation and Research in Digital Engineering

Delivery Excellence

Quality, Process Excellence, Benchmarking

Tools COE

Tools, Accelerators & Assets to support Service Delivery

Talent Management

Availability of Right Skills, at the Right Time

Learning & Development

Continuous Training & Talent Development

Human Resources

Employee Wellbeing & Experience

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Persistent Data & Analytics Practice – Helping customers in driving actionable insights out of their data ecosystem

1000+

Engagements in past 30+ Years

Global data & analytics practice overview

We are trusted strategic partner providing superior and measurable business value by bringing in best in class people, processes and technology solutions

9.2/10

CSAT score

3500+

Data relevant certified professionals

Data Strategy & Consulting

Enterprise Data Management

BI & Reporting

Advanced Analytics

Open-Source Contributions

Hadoop, Sqoop, Hive, SciDB, Apache Phoenix

Building data products is our DNA

Accelerators

Data Foundry, Connector Factory, Text.AI, ML Ops, Migration Utilities

AI ML based Data Quality, Dynamic Data Ingestion Framework

snowflake databricks aws Microsoft Gold Partner tableau Google Cloud

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Reporting platform Challenges

Reporting Ecosystem - Challenges

01

Maintenance

Supporting existing reports across various verticals and formats in large numbers comes with a huge cost

02

Governance

Clients generally don’t know which report already exists before submitting for a new report

03

Redundancy / Usage

Organizations do not have an accurate understanding of the frequency of usage of any report and the redundancies exist amongst their reports

04

Modernization / Migration

Modernizing the legacy BI platform and migrating reports/dashboards is a challenge for organizations for number of reasons.

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BI Migration Challenges

Typical BI migration challenges

Which Approach to Choose?	\ Lift and Shift \ Net new development \ Hybrid approach
What to Migrate?	\ No clear inventory of reports, dashboards, data assets delays the migration process
What can we automate?	\ Is there any possibility to automate any of the migration step?
What best practices to adopt?	\ Can we use best practices in the target platform to adhere to the prescribed approaches and standards?
How to increase user adoption?	\ How can we enable the developers and end users on the new BI platform?
How much time will it take?	\ Lack of control over migration timeline and lack of clear migration strategy.
Large number of data assets	\ How will we migrate the data assets and sources?
Migration Planning and Cutover	\ Migration Planning amidst other business priorities and carefully planning cut overs need meticulous planning and top down push

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Need for BI Migration

BI Migration – Common questions

How do we migrate hundreds of BI apps without overwhelming the team and confusing end users?

How can we define best practices in our new platform so we don't make a whole new mess?

How do we know which BI reports or dashboards to migrate?

Will the process be completely manual or is there any automation we can achieve?

How to prioritize the migration sequence to free up user licenses and maximize ROI.

How to get users to adopt and use a brand new BI platform and embrace self-service for their analytics needs.

Persistent Migration Accelerators can help in answering these questions.

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Why BI Migration

- Lack of advance features and capabilities in Legacy BI systems
  - Might struggle with handling huge volume of data, real time analytics, or supporting mobile access
  - shift towards self service analytics from manual analytical processes
- Scalability Challenges
  - May not be scalable, performance bottlenecks
- Cost Overheads
  - Maintaining and licensing legacy BI systems could be costly
  - May require extensive customizations to adapt to changing needs
- Future proofing BI strategy and platforms
  - Adopt latest technology, keep abreast with market changes
  - Take advantage of more modern capabilities, such as visual data exploration/Artificial Intelligence (AI)/Machine learning (ML) /Natural Language Querying
- Data Security & compliance risks
  - Legacy BI systems may not have native support to latest security and compliance requirements like HIPAA, GDPR etc.

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Business Impact of Migration to PowerBI

Business Impact of migrating to PowerBI

~30% elevation in user experience

30% savings related to licensing costs

Secure Data Governance across the Platform

Do More with Less by using Intuitive MS Power BI tools

Accelerated Decision-making with Self-service Analytics

Data-driven collaboration among stakeholders

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Accelerator Driven Migration Approach

Persistent accelerators for Report Factory

Preparation

- **Usages Metrics** for assessment and prioritization
  - Generate current system inventory, usages, user and report mapping.
  - Helps in prioritizing reports during migration.
- **Report Unifier** for consolidation
  - Identify duplicates, similar reports to be consolidated and rationalized.

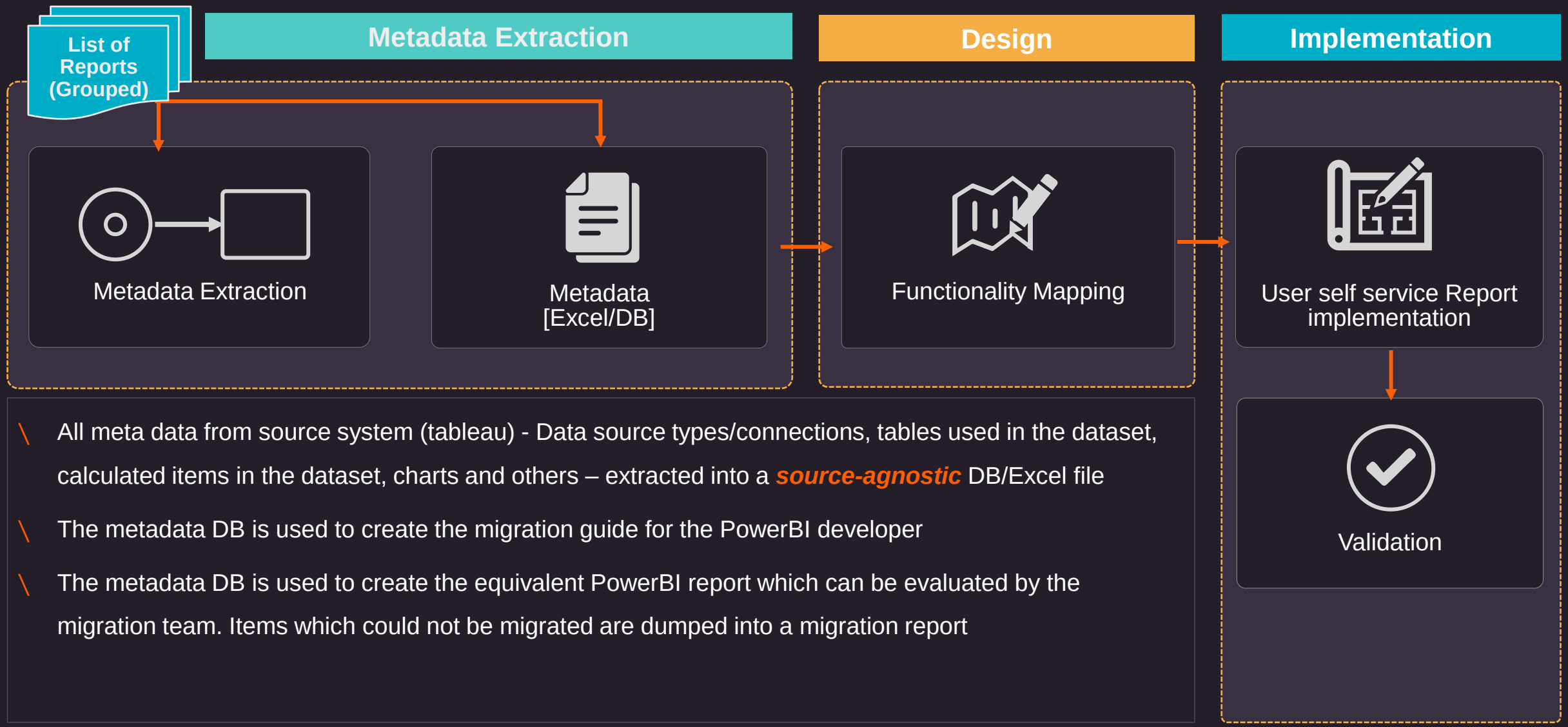
Execution

- **Automated Metadata extractor**
  - Extract KPIs, objects , data sources etc. which have **been** used in reports.
- **Functionality mapping and parser**
  - Map functionality of source(Tableau) to target (Power BI), parse to generate target template .
- **Automated PowerBI report creation**
  - Create PowerBI visualizations for Tableau reports to the extent possible in automated way.

Post Production

- **Automated Reports Recommendation Engine**
  - Provide existing templates matchings to new report requirements.
  - Reduce time, effort and future maintenance costs.
- **Usages metrics and Report Unifier** for continuous monitoring on old and new system.
  - Run these accelerators at scheduled interval(s) to monitor and mine performance and consolidation opportunities.

Tableau to PowerBI Migration Accelerator



- All meta data from source system (tableau) - Data source types/connections, tables used in the dataset, calculated items in the dataset, charts and others – extracted into a ***source-agnostic*** DB/Excel file
- The metadata DB is used to create the migration guide for the PowerBI developer
- The metadata DB is used to create the equivalent PowerBI report which can be evaluated by the migration team. Items which could not be migrated are dumped into a migration report

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Usage of Metadata – Examples

A Migration Guide Sample

Power BI Report Conversion Guide for Tableau Report - Superstore

This document provides a comprehensive guide for converting Superstore
Follow the steps outlined in each section to ensure a smooth transition.

Data Sources Used

#1 : Connect to the Excel file - 'Data/Superstore/Sales Target.xlsx'

#2 : Connect to the text file - 'Sales Commission.csv'

#3 : Connect to the Excel file - 'Data/Superstore/Sample - Superstore.xls'

Calculated Fields Used

Calculation Name	Formula	Type	Role
Base Salary	50000	quantitative	measu

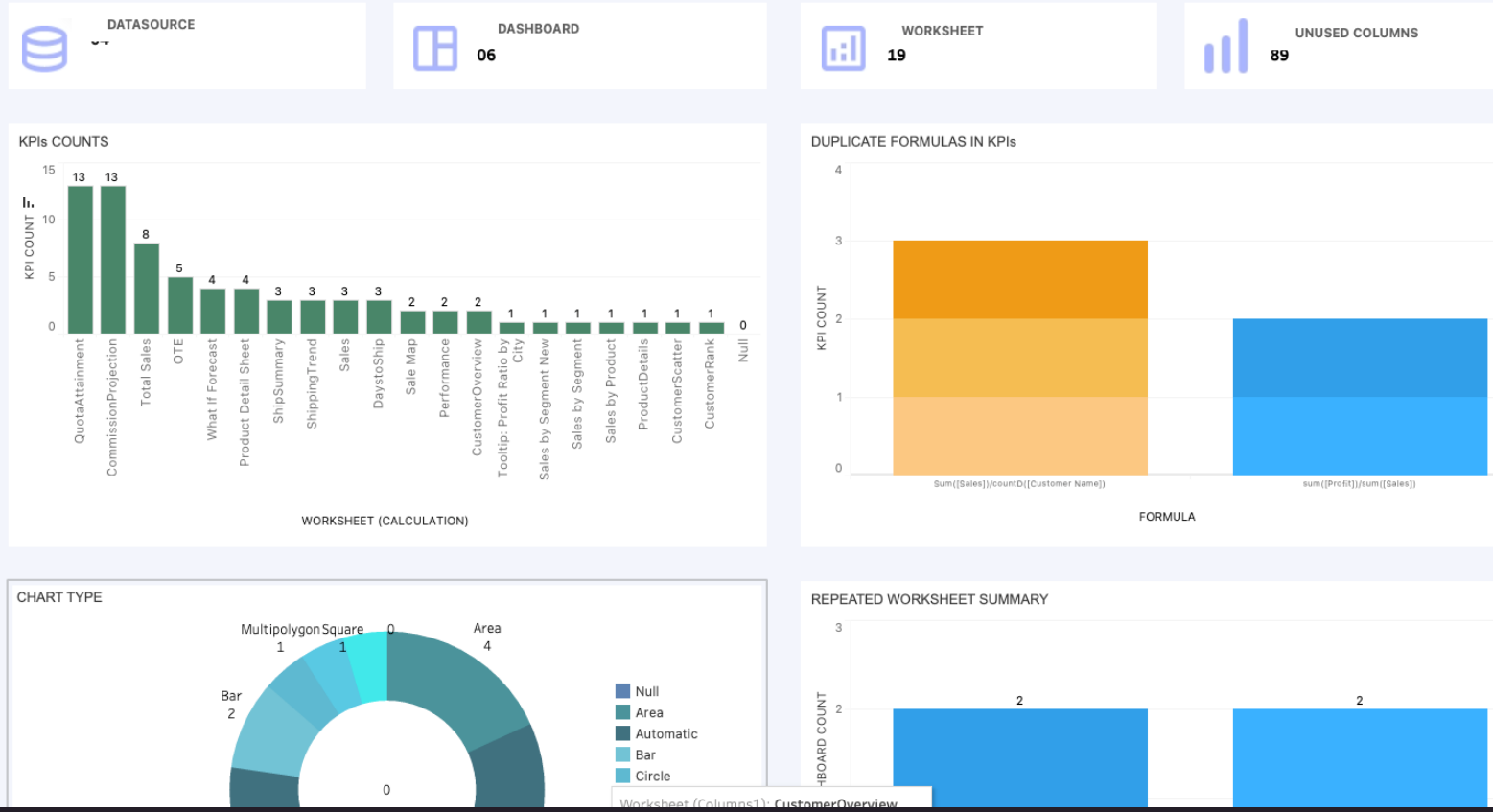
Migration Notes :

In Power BI, you can create a new column or measure to represent the equ
formula. Here's how you can do it:

1. Open your Power BI Desktop.
2. Go to the "Modeling" tab and click on "New Column" or "New Measure" t
3. In the formula bar, you can write the equivalent formula.

566 words | English (United States) | Accessibility: Investigate

Analyze MetaData for Standardizing Report Design



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