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Seamless Transition Migration from Cognos / Tableau Reports to Power BI

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Business Context

Strategic Migration from Tableau to Power BI

Over time, the client and organization have developed *a large-scale Tableau footprint*, with hundreds to thousands of reports spanning departments and geographies.

While this reporting ecosystem has supported decision-making, it now presents growing challenges:

- *Escalating licensing costs and fragmented report ownership*
- *Inconsistent reporting standards across business units*
- *Limited integration with modern automation and Microsoft-native platforms*
- *Lack of centralized governance, leading to duplication and trust gaps in data*

As the enterprise pivots toward a *Microsoft-first strategy*, the need for a scalable, low-disruption migration framework becomes urgent—not just to replicate existing reports, but to reimagine BI delivery for performance, extensibility, and user empowerment.

This transformation is not just technical—it's strategic. It demands a partner who can align architecture, automation, and adoption with business outcomes.

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Approach & methodology

Our Approach in 3 phases after the POC

1. Assessment
2. Migration
3. Reconciliation

Our proprietary algorithm enables end-to-end automation for transforming and rebuilding core components of the Power BI platform, ensuring speed, consistency, and scalability across migration workflows.

Automated Transformation Includes:

- **Visualizations**: Dashboards, charts, and associated styles, themes, and formatting
- **Semantic Modelling**: Data models, tables, relationships, calculations, and DAX measures
- **Dataset Mapping**: Intelligent alignment of source datasets to Power BI structures

Approach & methodology

1 Assessment

Automated Discovery & Scope Rationalization

➡️ Intelligent Inventory: Use APIs to extract 100% of Tableau assets (Workbooks, Data Sources, Users).

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➡️Scope Reduction: Analyze usage logs to automatically flag unused reports for decommissioning.

➡️ Complexity Scoring: Proprietary algorithm scores reports to accurately predict manual effort.

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Approach & methodology

2

Migration

Automated Conversion with a Self-Improving Engine

➡️ Secure Setup: Provision Dev/Test/Prod Power BI Workspaces and configure Microsoft Entra ID security.

➡️Automated Conversion (80%): Engine converts queries and visuals rapidly (less than 5 minutes per report).

➡️ Algorithm Refinement: Experts use the few manual fixes to update the core algorithm, expanding future automation.

Approach & methodology

3

Reconciliation

Reconciliation Guarantee & Go-Live

➡️ Data Integrity: Automated scripts validate control totals and logic consistency between systems.

➡️ Visual Fidelity: Proprietary reconciliation process performs a pixel-by-pixel review to ensure layout matches the original.

➡️Final Sign-off: Business users conduct UAT, leading to formal approval and deployment to Production

Our Differentiator

Intelligent Automation

- Automated Assessment & Discovery
- Rapid inventory and dependency mapping of Tableau assets
- Automated Conversion Engine
- End-to-end transformation of reports, models, and datasets with 80% accuracy

Accuracy & Assurance

- 100% Reconciliation Guarantee
- Pixel-perfect and logic-consistent validation between Tableau and Power BI
- Full-Fidelity Migration
- Every report, model, & dataset migrated with integrity

Performance at Scale

< 5 Minutes per Report Conversion

< 5 Minutes per Model Conversion

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Study Case

To demonstrate our proven methodology, we've outlined a case study involving the migration of 1,000 reports.

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Scope (case study)

In Scope

- Migrate ~1000 Tableau workbooks to Power BI Reports
- Migrate associated semantic models and datasets

Out of Scope

- ***Report Transformation:*** Migrate Tableau reports to Power BI (Paginated & interactive), enhance visuals, and optimize performance
- ***Infrastructure Readiness:*** Plan capacity, configure workspaces/gateways, and manage licensing for Power BI and related platforms
- ***Data & Integration:*** Migrate legacy data with ETL/ELT pipelines and align datasets to Power BI semantic models
- ***Security & Access:*** Transition users, groups, and RBAC roles; implement governance-aligned security models
- ***Legacy Decommissioning:*** Retire Tableau assets and archive reporting logic for compliance and continuity

Assumptions and Dependencies

Assumptions

A provision of up to 2 hours per day for UAT and production support is deemed sufficient to meet the requirements over the two-month period.

Client reporting landscape is characterized by the following distribution:

- ➡️~85% of reports comprise approximately 5 dashboards each
- ➡️~13% include around 10 dashboards per report
- ➡️~2% consist of more than 20 dashboards per report

Data sources remain constant for the scope of the migration

Assumptions and Dependencies

Dependencies

➡️Access to both source and destination Reporting Environment (including Database access) - At least 1 Non Prod environment access is needed.

➡️Necessary financial, regulatory and business & travel approvals.

➡️Code freeze to be provided before the commencement of migration.

➡️Access to metadata of all Tableau workbooks and associated dependencies to be migrated.

Cost & Schedule

1. **W1 & 2: POC** ~15 Tableau-Power BI migration
2. **W3 & W4: Assessment *Step-1:*** Client's Reporting Landscape Discovery
3. **W5 & W6: Assessment *Step-2***: Scope freeze for migration
4. **W7 & 8: Migration *Step-1:*** Environment setup
5. **W9-12: Migration *Step-2:*** Reports Migration Execution
6. **W13-16: Reconciliation** Reconciliation of migrated reports
7. **W17: UAT Deployment**

Cost driving factors:

Reports Range	* % of overall reports
Average 5 dashboards/report	85
Average 10 dashboards/report	13
>20 dashboards/report	2

***Current consideration of overall reports:1000 / 16 weeks duration**

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Company profile

At **Quintesys**, we specialize in transforming how organizations harness their data through modern business intelligence solutions. Our core expertise lies in migrating legacy reporting systems to scalable platforms like Microsoft Power BI and open-source environments such as Apache Superset.

What sets us apart is our **automation-first and GenAI-enabled approach**. We accelerate migration workflows using intelligent scripting, reusable templates, and AI-assisted transformation logic—dramatically reducing manual effort and deployment time.

Leveraging Generative AI, we further enhance reporting modernization by:

- Automatically generating report summaries and insights for end-users
- Assisting in metadata mapping and dashboard rationalization

Our migration offerings include:

- Migration from **IBM Cognos to Power BI**
- Migration from **Tableau to Power BI**
- Migration from **Cognos or Tableau to Apache Superset**

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