



# Power BI Training and Transition from Tableau

## Challenge

The client had chosen to migrate from Tableau to Power BI. As a result, they needed to provide Power BI training for all internal staff, including an analytics team, to bring them up to speed and provide guidance on moving their reporting to Power BI. In addition to the necessary training and migration guidance, the client had several Power BI models that had long refresh times, so the client also needed a partner who could assist with the issue as well as help them understand how to derive meaningful and insightful data from the data models.

In addition to these requests, the client also expressed interest in developing a dashboard to be embedded in a new external customer-developed portal solution

requiring row-level security (RLS) integration with the portal and its security process. The client wanted to understand the correct approach for the security required to transition from Tableau to Power BI in addition to best practices on methods to accommodate the growing business. The client needed solutions to these challenges as soon as possible, so they turned to INSPYR Solutions for expert support.

## Solution

INSPYR Solutions assigned one of its Data & Analytics Practice Leaders to this project in recognition of the urgency required to get the client on track as soon as possible. As an expert in this area, the consultant was able to analyze the scope of the project very quickly, and performed

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the following steps for the client to give them a roadmap to success:

**Step 1: Power BI training sessions.**

The INSPYR Solutions team facilitated training from beginner to advanced learning levels, encompassing both dashboard development and Power BI service. In addition, individual one-on-one training sessions and development processes were provided as needed.

**Step 2: Review of data models.**

The team implemented parameters to apply consistency in the Snowflake warehouse that was being used. INSPYR Solutions also performed a time analysis to examine necessary data with partitions implemented to refresh and retrieve data faster.

**Step 3. Mobile portal and security.**

The purpose of the mobile portal was to display reports from the analytics team to business operators via Power BI embedding. Extensive work was involved to define the scope of the mobile portal report requirements with users in the business as well as technologists. Row-level security was implemented as a security measure for embedded Power BI reports connecting to two mobile portals to display the correct information to the appropriate audience, who was granted access.

**Step 4. Successful project**

**implementation.** A team from INSPYR Solutions was deployed to train all internal staff members on best practices to be utilized in working with Power BI.

## Outcome

Once the client engaged INSPYR Solutions to assist with these projects, the team delivered successful training and performed the advanced technology work of embedding Power BI into the client's mobile application. Our team also assisted the client with gaining an understanding of the infrastructure needed to convert the Tableau reports and dashboards into Power BI. The client's requests were all met within the project timeline and INSPYR Solutions delivered the improvements the client needed. The efficiencies gained enabled the client to save time and money, and the client's staff was prepared to work autonomously in the new systems.

## Client Profile

The client provides mobile solutions that give consumers a safe, secure, and responsible way to fund their online and in-person gaming activities and enables businesses to offer cashless wagering and

personalized loyalty options across the entire property. Through its unique technology offerings, the client is uniquely positioned to transform the traditional gaming landscape.

## Technologies Supported/ Created

Power BI, Snowflake, Tableau.

## About INSPYR Solutions

Technology is our focus and quality is our commitment. As a leading expert in delivering flexible technology and talent solutions, we strategically align industry and technical expertise with our clients' business objectives and cultural needs. Our tailored offerings include a wide variety of professional services, project solutions, managed services, and talent resources, all bolstered by our strategic partnerships with cutting-edge technology services. By always striving for excellence and focusing on the human aspect of our business, we work seamlessly with our talent and clients to match the right solutions to the right opportunities. Learn more about us at [www.inspyrsolutions.com](http://www.inspyrsolutions.com).