

A FIELD GUIDE IN FIVE PILLARS

Modernize your BI estate. Build what comes next.

Every reporting estate rests on the same five load-bearing capabilities, whether anyone has named them or not. EntityBI names them, builds on them, and keeps your team at the review of every one — across Power BI, Tableau, Looker, Cognos, MicroStrategy, SAP BusinessObjects, Salesforce, and Omni.



An estate nobody designed on purpose

Most BI estates weren't built. They accumulated — one platform migration here, one urgent dashboard there, three years of analysts solving today's problem with today's deadline.

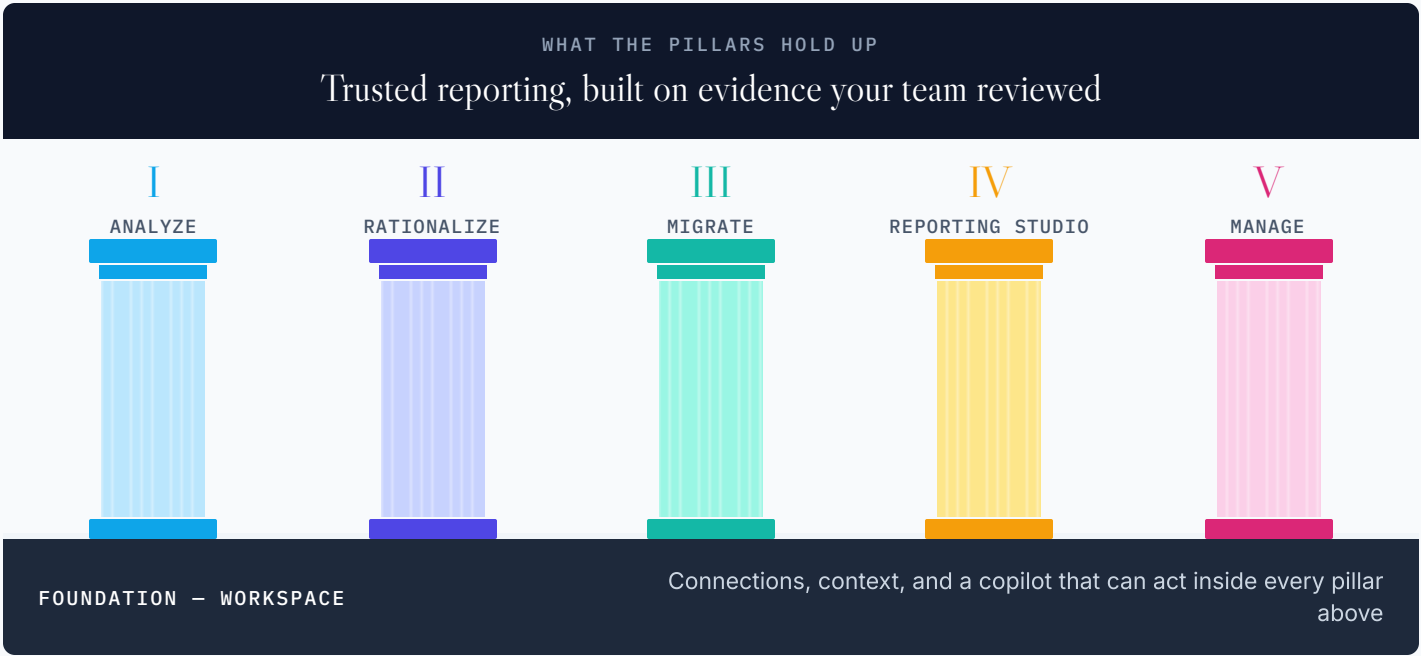
Nobody disagrees that the estate should be understood, prioritized, modernized, and operated with evidence. The gap is that those are four different conversations, usually with four different owners, rarely connected to the same inventory.

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- Reports and models scattered across five platforms, with no shared inventory of what exists or who depends on it.
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- Duplicate logic nobody notices until two dashboards disagree in front of a client.
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- A platform migration that outruns the team's ability to review what came out the other side.
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- Reporting requests that bypass governance because the governed path is slower than asking an analyst directly.
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An estate like that doesn't need another tool bolted on top. It needs pillars — permanent, load-bearing capabilities a team can actually stand on, in an order that holds up under weight.

Five pillars, one estate

Each pillar carries its own weight. Together, they hold up one outcome: a reporting estate your team understands, trusts, and can defend.



Pages 4–8 take each pillar in turn. Page 9 is the foundation they all share. None of it replaces the review your team already does — it gives that review something solid to stand on.

Understand what your BI estate contains before you change it.

"What exists, what depends on it, and where is the complexity?"

Analyzer brings inventory, complexity, dependencies, readiness, object detail, and connection context into view across the platforms your teams actually run — Power BI, Tableau, Cognos, MicroStrategy, Looker, and SAP BusinessObjects — then exports that evidence for review.

WHAT YOU GET

- Scoped inventory and asset catalog
- Complexity and readiness scorecards
- Dependency and lineage summary
- Platform-specific extraction notes, including gaps
- Delivery wave input for the pillars that follow

HOW IT RUNS

- 01 Connect or upload platform assets
- 02 Extract metadata and dependencies
- 03 Score complexity and readiness
- 04 Open the analyzer workspace for review
- 05 Move reviewed assets onward

WHERE THIS PILLAR RUNS

Power BI

Tableau

Cognos

MicroStrategy

Looker

SAP BusinessObjects

Boundary. Coverage depends on the source platform, asset type, and permissions granted. Analysis is scoped to what EntityBI can read — it does not automatically discover every asset in an enterprise.

Decide what to keep, consolidate, retire, rebuild, or migrate.

"What should we keep, consolidate, retire, rebuild, or migrate?"

Rationalization turns analyzer output into portfolio decisions: duplicate and similarity clusters, canonical asset candidates, strategy templates, and run history — with exportable evidence your owners can actually review.

WHAT YOU GET	HOW IT RUNS
• Owner-reviewed decision register • Duplicate cluster review with shared-field evidence • Canonical asset recommendations • Retire, merge, rebuild, or migrate backlog • Scope reduction notes for the delivery plan	01 Import analyzer output 02 Cluster similar assets 03 Review shared tables, fields, and formulas 04 Record a strategy decision with its owner 05 Promote only selected assets onward
WHERE THIS PILLAR RUNS	
Power BI Tableau Cognos MicroStrategy Looker SAP BusinessObjects	

Boundary. Similarity is evidence for review, not permission to delete. Business value, criticality, and retirement decisions stay with your report owners — EntityBI records the decision and the evidence behind it.

Move selected assets along a supported direction, with the review loop intact.

"How do selected assets reach a new platform with business meaning preserved?"

Migration converts source assets into a target workspace, then keeps validation, repair, lineage, packaging, and handoff in the same surface — so your team reviews the result before anything is released, not after.

WHAT YOU GET

- Converted target workspace
- Conversion report and exception list
- Translated calculations and semantic mappings
- Publish-ready artifacts, where the direction supports it
- Validation and handoff evidence

HOW IT RUNS

- 01 Select a supported direction and variant
- 02 Upload a file or connect the source server
- 03 Run parser, converter, and enrichment
- 04 Review and repair in the generated workspace
- 05 Validate, package, and hand off

WHERE THIS PILLAR RUNS

Power BI

Tableau

Looker

Omni

Cognos

MicroStrategy

SAP BusinessObjects

Salesforce

Boundary. Migration is directional. EntityBI supports specific source-to-target directions, not arbitrary any-to-any conversion. Fidelity is not guaranteed — confirm source versions and asset types during assessment.

Build and improve reporting on the platforms you already run.

"How do we create and improve reporting on the platforms we use — without a migration?"

Reporting Studio is how EntityBI helps with no migration required. Teams build or maintain BI assets directly in platform-native workspaces, using scoped agent modes, with every proposed change available for review before it's released.

WHAT YOU GET

- Platform workspace ready for review
- Semantic model, report, or workbook object state
- Agent-proposed edits with change records
- Validation queue and results
- Publish-ready package, where the platform supports it

HOW IT RUNS

- 01 Start blank, migrated, or from a connected source
- 02 Attach data and BI server connections
- 03 Use agent modes to design and build
- 04 Review changes in the workspace panels
- 05 Download, publish, or move into operations

WHERE THIS PILLAR RUNS

Power BI

Tableau

Looker

Omni

Boundary. Publish and deploy coverage differs by platform. An available agent mode is not proof a task succeeded — changes are proposed, reviewed, and released by your team.

Operate workspaces with connections, versions, changes, and release controls.

"How do teams control access, connections, changes, and release work?"

Management turns delivered BI work into an operating process: saved BI server credentials, database and MCP connections, workspace publish controls, version snapshots and diffs, logs, and tenant administration.

WHAT YOU GET

- Attached BI server and database connections
- Release readiness checklist
- Deployment metadata
- Version and change history
- Tenant administration and operating responsibilities

HOW IT RUNS

- 01 Attach platform credentials
- 02 Review workspace state and validation results
- 03 Run the publish or download action
- 04 Track deployment status and change history
- 05 Operate through customer admin controls

WHERE THIS PILLAR RUNS

Power BI

Tableau

Looker

Omni

Cognos

MicroStrategy

SAP BusinessObjects

Boundary. These are workspace and tenant operations. A comprehensive enterprise catalog, estate-wide lifecycle ownership, and governance enforcement are roadmap items, not available today.

Every pillar stands on the same ground.

Workspace isn't a sixth pillar — it's what the five above are built on. Connections, context, and history don't reset when you move from Analyze to Manage; they stay attached to the work, and a copilot can act inside any of them.

Context that carries over

Connections, version history, and chat history belong to the workspace, not the session — open Pillar III next week and the context from Pillar I is still there.

A copilot inside every pillar

The same agent modes that build a report in Reporting Studio can propose a rationalization cluster or draft a migration repair — scoped to that workspace, never acting outside it.

Nothing ships unreviewed

Agent-proposed edits and manual saves follow the same controlled path: versioned, diffable, and released only when your team runs the publish action.

One administration model

Users, roles, SSO, branding, templates, and logs are managed once, through customer admin — not reconfigured per pillar.

Where this stands today: workflow definition and on-demand runs on the canvas are available now. Persistent schedules and long-term run diagnostics are preview surfaces we'll demonstrate for your scenario, not claim as shipped.

Start with the platform you run today

One journey, shaped to each platform's own objects and workflows. Coverage and migration directions vary — see entitybi.com/platforms for current scope.

 Power BI Lead reporting workspace and analyzer AVAILABLE	 Tableau Native workspace and analyzer AVAILABLE	 Looker Analyzer and native LookML workspace AVAILABLE
 Cognos Analyzer and migration source AVAILABLE	 MicroStrategy Analyzer, inspection workspace, migration source AVAILABLE	 SAP BusinessObjects Analyzer and migration source AVAILABLE
 Salesforce Reporting conversion to Power BI AVAILABLE	 Omni Omni workspace and publish path AVAILABLE	 Qlik QlikView scope under design — not yet available PLANNED

A design preview or editorial color does not establish availability. Migration is directional — EntityBI does not convert arbitrary source and target combinations — and scope is confirmed against your source versions and asset types during assessment.

Enterprise-ready, on your terms

Two deployment models, with identity, connectivity, and data access policy owned by your team either way.

SAAS TENANT

EntityBI hosted SaaS

A dedicated tenant, operated as SaaS with tenant-level isolation, managed updates, and faster onboarding.

- Client-specific tenant, users, roles, and workspaces
- Managed application updates and release cadence
- Tenant-level workspace separation by function
- Secure connectivity to approved BI platforms and sources

CLIENT CLOUD

Deploy inside your network

Runs inside your own cloud and network boundary — Azure, AWS, or GCP.

- Deployed into your cloud account, VPC/VNet, and security controls
- Private connectivity to BI platforms, warehouses, and identity
- Environment-specific storage, secrets, logs, and queues
- Runs lifecycle services inside your own boundary

3

cloud targets for client-cloud deployment
— Azure, AWS, GCP

2

deployment models, one review standard
across both

0

releases without an owner decision on your
side

You keep identity

Identity users, approval workflow, and SSO stay under your control in both models.

You set the policy

Data access policy and workspace governance are configured by your team, not assumed by ours.

You review every release

Version history and change review precede every publish — nothing ships without an owner decision.

NEXT STEP

Start with your platform.

A Power BI dataset, a Tableau workbook, a Looker metric definition, a SAP BusinessObjects universe — each brings a different first question. Tell us yours and we'll show the relevant pillar, the workspace it runs in, and what your team reviews along the way.

I Share your platform and objective

What you run today, and the decision you're trying to make.

II We confirm scope against your estate

Source versions and asset types determine what's in scope — confirmed, never promised in advance.

III You see the pillar and the first review

The relevant workflow, the workspace it runs in, and exactly what your team reviews before anything ships.

See EntityBI on the platform you run today.

entitybi.com/demo-request

[Book a demo →](#)