

Gartner Research

Quick Answer: How to Audit and Migrate Legacy Analytics Dashboards

David Pidsley

6 February 2024

Gartner[®]

Quick Answer: How to Audit and Migrate Legacy Analytics Dashboards

Published 6 February 2024 - ID G00773597 - 6 min read

David Pidsley

Initiatives: Analytics and Artificial Intelligence

Many organizations struggle with how to migrate or consolidate their existing analytics dashboards from their legacy analytics and BI platforms to new platforms. Data and analytics leaders should use this research to streamline the migration process with a resilient and value-added approach.

Quick Answer

How can we audit and migrate our legacy analytics dashboards to a new platform?

- Audit and triage the value-added assets to be migrated. This will reduce the effort because not all analytics content is worth migrating
- Avoid replicating and copying dashboards feature-by-feature to the new platform; instead, migrate by analytics use cases and rethink how the content can be delivered by leveraging modern capabilities in new platforms.
- Empower business analysts with self-service analytics, enabling them to autonomously develop their analytics scenarios and continuously uncover novel use cases.
- Leverage the analytics catalog capability to manage all analytics assets and provide observability even in the intermediate stage.

More Detail

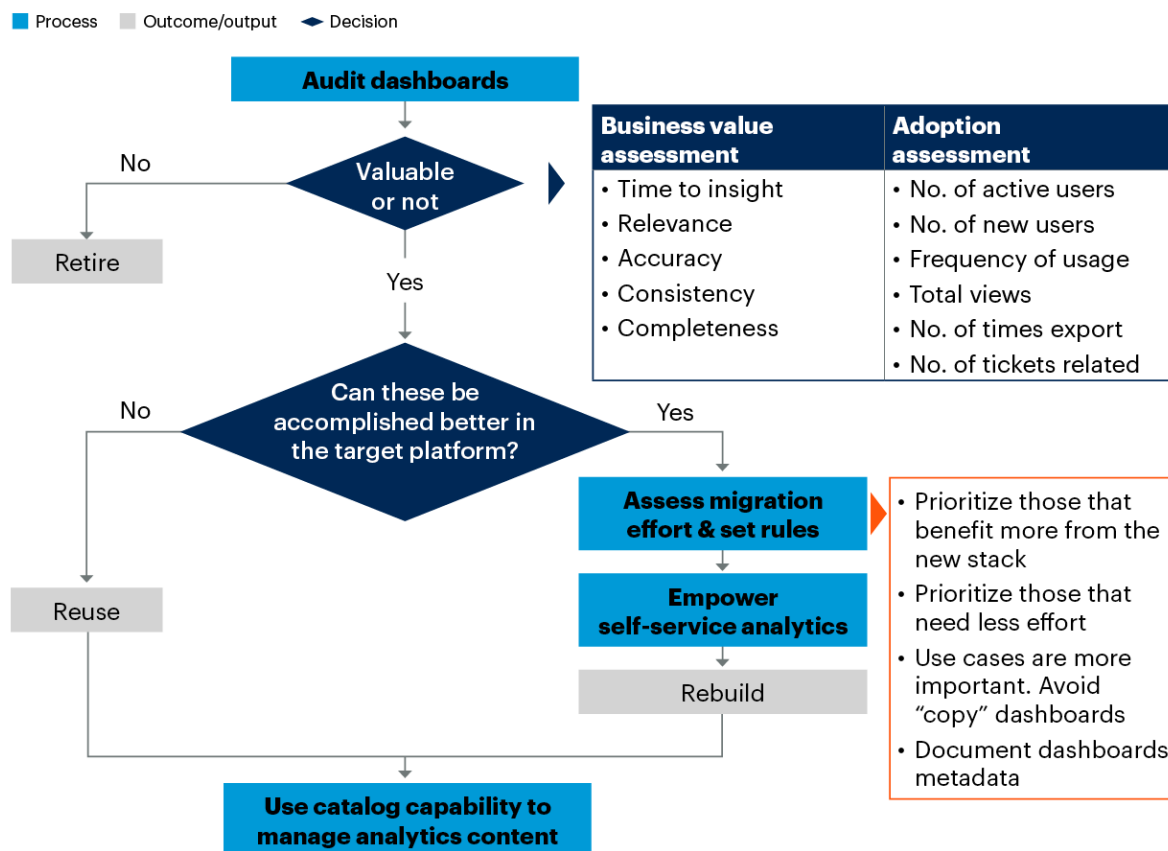
The initiative of analytics and business intelligence (ABI) platform migration is often triggered by:

- Organizations changing their data and analytics (D&A) strategy and operating model (e.g., adopting a vision to move to the cloud ecosystem), overall IT stack change (e.g., adopting a modern data platform), business transformation, post-acquisition mergers or an effort to reduce redundancy
- Organizations concerned with technical debt and the age and brittleness of underlying technology (such as the retirement of Adobe Flash, and Microsoft IE) used by legacy BI platforms
- Ownership and maintenance of the current platform becoming much more expensive than purchasing and implementing a new platform, considering the different pricing models and levels of scalability

However, ABI platform modernization could be painful and risky for organizations since there are so many existing analytics dashboards and reports running on their legacy platforms. These reports might be slow to use and change, but they still serve mission-critical reporting needs and provide business value. Therefore, organizations should create a migration strategy to prioritize an appropriate scope for replacement and smooth the transition process (see Figure 1).

Figure 1: Analytics Dashboards Migration Process

Analytics Dashboards Migration Process



Source: Gartner
773597_C

Gartner

Step 1: Audit Existing Dashboards by Adoption Status and Value Realized

Not all dashboards and reports should be migrated. Business users must be involved from the beginning to clarify the business value and adoption status of analytics content (see Figure 1). The D&A team should fully communicate and collaborate with business stakeholders to conduct value and adoption assessments of dashboards. Dashboards could be evaluated and categorized into different value groups. Gartner recommends leveraging auditing or usage analytics modules if available to reduce manual work.

Organizations often accumulate reports and dashboards that fall into disuse over time. Therefore, some dashboards provide less value and should be consolidated into new dashboards. The old dashboards should be retired. When dashboards and reports serve important use cases (e.g., finance, legal or compliance domains) and cannot be achieved in the target new platforms, reuse and maintain content (metrics) on the traditional platform until the new platform fully supports them.

Step 2: Assess Migration Effort and Set Migration Rules

D&A leaders must decide between an exhaustive overhaul or a quick but acceptable transition. In an exhaustive overhaul, the migration effort would be expanded to consider investing in a semantic layer that offers more agile and well-harmonized metrics to future ABI platforms, or even redesigning the whole data stack and the KPI systems. When D&A leaders choose a quick but acceptable transition, they must consider consolidating existing dashboards. Although rebuilding work is inevitable in most cases, semiautomated migration is possible. Consider leveraging tools and services from D&A service providers, such as Wipro SNIPE and PITSS.

Organizations often try to replicate old dashboards and reports in the new platform. This approach may appear deceptively simple for IT departments to practice and simple for business users to adapt to. However, due to technology differences, it is often hard to copy every widget feature by feature, like for like, into the new platform. Furthermore, such practices bypass the benefits and higher business value of advanced capabilities provided by the target platform.

D&A leaders must prioritize and establish migration rules to balance efficiency and analytics value optimization.

- Define the purpose of the new platform. Prioritize dashboards and reports that can be run better and benefit from the new platform. For instance, a new platform may offer augmented capabilities such as forecasting and simulation to fulfill augmented use cases or provide better performance. Automated insights are the most important critical capability in the selection of an ABI platform in the next year, according to the Gartner 2023 Analytics & BI Platforms Magic Quadrant Highlights webinar poll respondents.¹ These enable the application of machine learning (ML) techniques to automatically generate insights for end users (for example, identifying the most important attributes in a dataset). Do not seek to migrate manual dashboards where automated insights and augmented capabilities make them redundant.

- Estimate migration effort by categorizing tasks to different levels of analytics work needed. Does the dashboard require analytics models rebuild, metrics redesign or just visualization recreation? Does the dashboard contain complex calculations, formulas, layout design and filters? Who, and at which professional level, should do the migration?
- Avoid lift and shift, when you only “copy” dashboards to the new stack but deploy the same analytics use case in the new platform.
- Define D&A ownership, standardize and document the key metadata of dashboards during the transition for governance purposes. Names, descriptions and categories of dashboards should be cleaned up, well-documented and managed for further governance purposes.

Step 3: Empower Self-Service Analytics Use of the New Platform

The ABI platform migration journey is an opportunity to promote self-service analytics and increase overall data literacy within the organization. In fact, the polls from the previously mentioned webinar found that business analysts (47%) are the most important users in their selection of ABI platforms in the next year. ¹ Modern ABI platforms lower the technical barriers to allow business users to quickly deploy their analytics use cases and create context-enriched analysis. This releases centralized IT from tedious rebuilding work to focus on advanced data modeling and other innovative technical use cases, such as using AI and ML to create data science models. With self-service analytics, business analysts from lines of business could better redevelop dashboards and reports and identify new use cases that can gain more business value from the new platforms.

Step 4: Leverage the Analytics Catalog Capability to Manage All Analytics Contents

The ABI platform migration is not a short-term project but a journey, especially when some dashboards and reports cannot be easily rebuilt in the new platform. The analytics catalog module can be introduced to manage various analytics contents from tools invested in different phases. It also helps to minimize the impact on daily business analytics usage in the intermediate stage when you do not need to jump between different tools. Analytics catalog capability is one shape of composable analytics that supports portal-like curation and collaboration in one place. Analytics catalogs enable a single point of entry to find existing content, thereby reducing wasted work in dashboard duplication. This is a vital capability built into modern ABI platforms or is provided by independent software vendors giving data source connectivity across many ABI platforms.

Evidence

¹ The Gartner 2023 Analytics & BI Platforms Magic Quadrant Highlights webinar held on 13 September 2023 conducted two polls among 539 participants:

1. Which critical capability is the most important in your selection of an ABI platform in the next year? (272 respondents)
 - Automated insights (28%)
 - Data storytelling (25%)
 - Data science integration (19%)
 - Collaboration (13%)
 - Metrics store (7%)
 - Natural language query (7%)
 - Other (1%)
2. Which users are most important in your selection of ABI platforms in the next year? (267 respondents)
 - Business analysts (47%)
 - Augmented consumers (21%)
 - Analytics developers (18%)
 - Data scientists (14%)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

Creating a Modern, Actionable Data and Analytics Strategy That Delivers Business Outcomes

Evolve Self-Service Analytics for the Era of Generative AI

3 Steps to Build and Optimize a Portfolio of Analytics, Data Science and Machine Learning Tools

Innovation Insight: Metrics Stores

Market Guide for AI and Data and Analytics (D&A) Service Providers

© 2024 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.

Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools for Data & Analytics leaders:



Webinar

Is Your Data AI Ready? Critical Questions You Must Ask Data Engineers

Explore the interactive relationship between traditional and augmented data management.

[Watch Now](#)



Webinar

The Foundation of a Modern Data and Analytics Strategy

Delve into a data and analytics strategy that enables organizations to thrive in dynamic business environments.

[Watch Now](#)



eBook

Get AI Ready — What IT Leaders Need to Know and Do

Ready your enterprise to capture AI opportunities and bolster your cybersecurity.

[Download eBook](#)



Roadmap

Solution Path for Building Modern Analytics and BI Architectures

Use this roadmap to build self-service analytics and business intelligence architectures.

[Download Now](#)

Already a client?

Get access to even more resources in your client portal. [Log In](#)

Connect With Us

Get actionable, objective insight to deliver on your mission-critical priorities. Our expert guidance and tools enable faster, smarter decisions and stronger performance. Contact us to become a client:

U.S.: 1 855 811 7593

International: +44 (0) 3330 607 044

[Become a Client](#)

Learn more about Gartner Data & Analytics

gartner.com/en/data-analytics

Stay connected to the latest insights



Attend a Gartner conference

[View Conference Calendar](#)