



# Embedded BI

## Features Checklist

# The Rise of Embedded BI in the Digital Era

In today's digital-first world, businesses seek tools that integrate seamlessly into their existing platforms, enhancing decision-making without jumping between multiple applications. Embedded Business Intelligence (BI) tools rapidly become a cornerstone for such integrations. But with a multitude of options available, how do you determine the best fit? Our essential features checklist will guide you through the process, ensuring you pick the right embedded BI solution tailored to your business.

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# Core Features

In this first point, we will explore the fundamental capabilities that should be at the heart of any embedded BI tool. These essential capabilities form the bedrock of a versatile and powerful analytics solution and shouldn't be overlooked. As you embark on your journey to select the right embedded BI vendor, pay close attention to these essential building blocks. They will empower you to unlock the full potential of your data and create an exceptional analytics experience.



### ✓ **Data Connectivity**

Ensure the tool supports diverse data sources like APIs, SQL databases, cloud storage, and more.

### ✓ **Data Visualization**

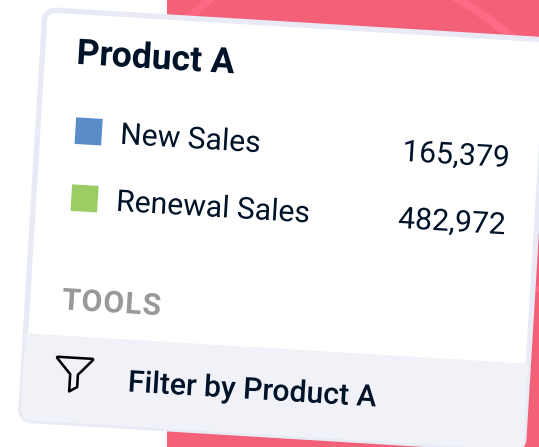
Look for a rich library of charts, graphs, and other data visualization tools, including geospatial visualizations and heatmaps, and the ability to create custom visualizations.

### ✓ **Interactive Dashboards**

Move beyond static dashboards. Features like drill down and filtering are key for insights generation.


### ✓ **Self-Service**

A key embedded BI feature that empowers users to create customized dashboards on the fly without the need for predefined templates or extensive technical expertise.

An illustration of a dashboard widget for 'Product A' showing sales data and a filter tool.

Product A	
<span style="color: blue;">■</span> New Sales	165,379
<span style="color: green;">■</span> Renewal Sales	482,972

**TOOLS**

 Filter by Product A

You'll also want to pay attention that these features are included:

- ✓ **Simple & approachable UX for any user**
- ✓ **Dashboard templates**
- ✓ **Custom & ad-hoc filtering**
- ✓ **Automatic drill down & data hierarchies**
- ✓ **Custom visualizations**
- ✓ **Theming & branding capabilities**
- ✓ **Seamless embedding into your application with no iFrames**
- ✓ **Export to Microsoft Excel, PowerPoint, PDF**
- ✓ **APIs on the client and server that enable total control over the BI experience**



# Developer Experience

When assessing embedded BI vendors, the emphasis on the developer experience within the SDK becomes a critical factor in determining the success of your BI project's proof-of-concept and implementation phases.

## ✓ SDK Availability

Client-side SDKs tailored for modern programming languages such as C#, JavaScript, or TypeScript are essential for achieving deeper customization and control during deployment. Equally important are server SDKs compatible with common back-end technologies like .NET Core, Node.js, and Java.

## ✓ Documentation & API Support

Developer how-to documentation, in addition to API documentation enriched with code snippets, is crucial for ensuring a seamless integration process.

```
1. <!DOCTYPE html>
2. <html lang="en">
3. <head>
4.   <meta charset="UTF-8">
5.   <meta http-equiv="X-UA-Compatible" content=
6.   <meta name="viewport" content="width=device
7.   <title>Reveal Sdk - HTML/JavaScript</title>
8. </head>
9. <body>
12.   <script src="./assets/reveal/infragist
13. </body>
14. </html>
```

### ✓ **Samples & Training**

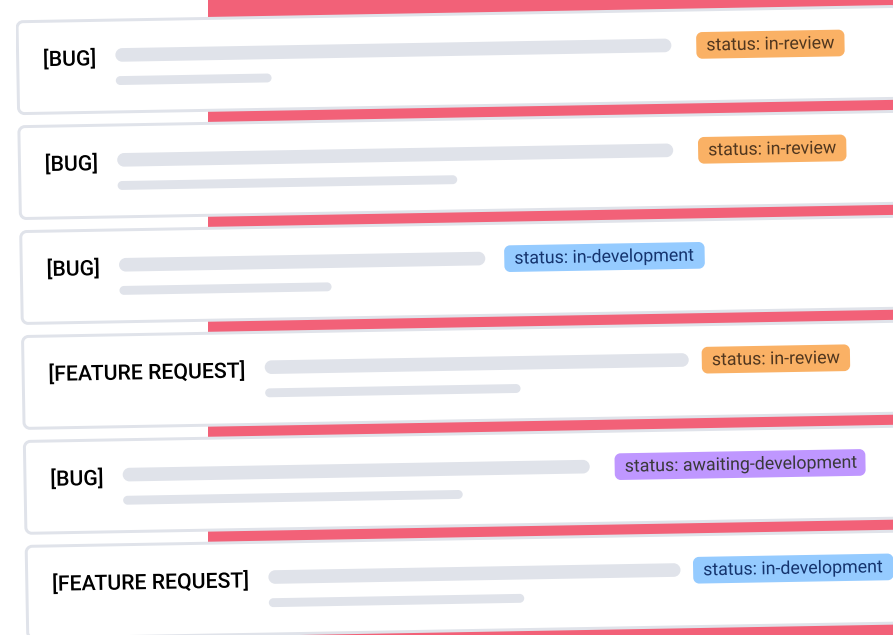
Providing comprehensive end-to-end examples on GitHub for both client and server features, along with step-by-step video training and accompanying guides, will equip your development team with all the necessary resources to integrate the solution into your application seamlessly.

### ✓ **Real-time Support**

The availability of support channels, including real-time chat, email, and escalation paths, guarantees that assistance is readily available when needed.

### ✓ **Issues, Bugs & Roadmap Transparency**

Access to GitHub for posting new issues, viewing, and commenting on existing issues, as well as accessing the roadmap and release notes, instills confidence within the development team. This access assures them that the vendor maintains transparency regarding their processes and the current state of the product.





# Data Analysis Features

Regarding self-service embedded analytics, the priority for your customers and end-users is the “**ease of use.**” Your customers expect a simple experience to create visualizations and dashboards, view underlying data, and draw conclusions without specialized training or IT involvement.

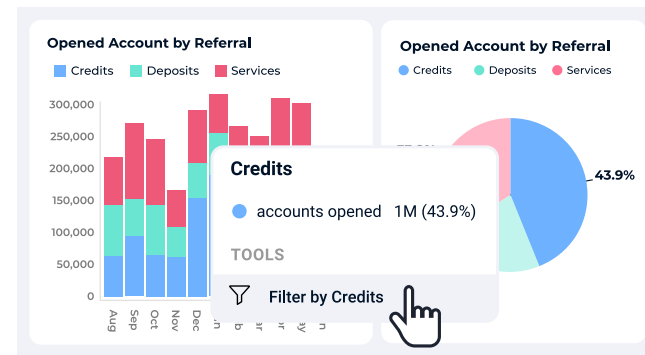


The top embedded BI data analysis features you should be looking for include:

✓ **Self-service analytics experience with a rich WYSIWYG drag & drop visualization editor**



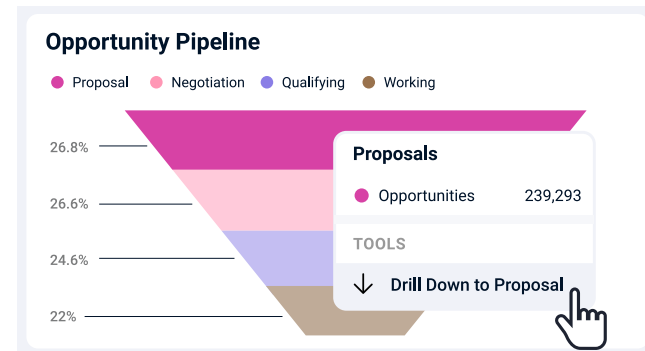
✓ **Ad-hoc data dashboard filtering & exploration**



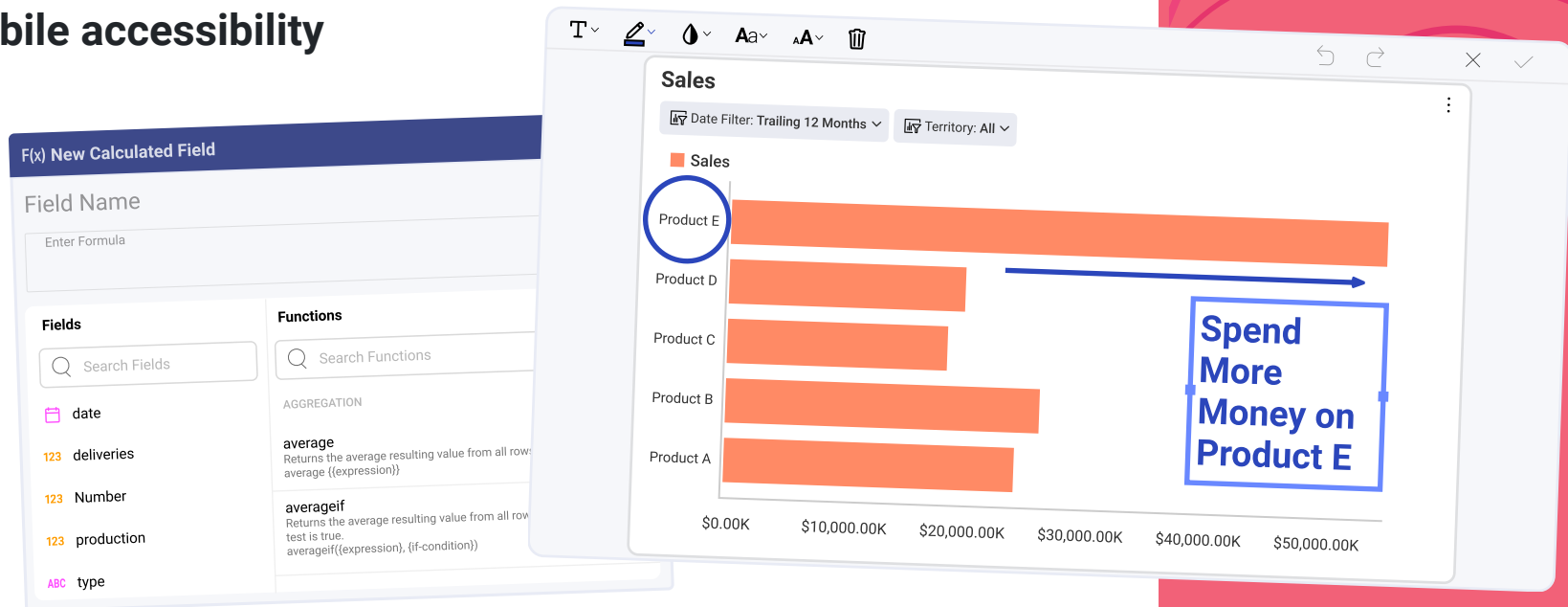
✓ **Time-series drill-down**



✓ **Hierarchical drill-down**



- ✓ **Data joining & blending**
- ✓ **Dashboard linking**
- ✓ **Calculated & custom fields**
- ✓ **Tooltips with data values & summaries**
- ✓ **Annotating & exporting visualizations as images**
- ✓ **Statistical functions like Regression, Forecasting & Outliers**
- ✓ **Mobile accessibility**



# Customization Capabilities

Customizing the user experience enhances engagement, satisfaction, and the overall competitiveness of your solution. It's crucial that any embedded BI solution not only replicates the look and feel of your application but also provides the capability to tailor the user experience based on individual user needs and profiles.

Customization capabilities you should consider include:

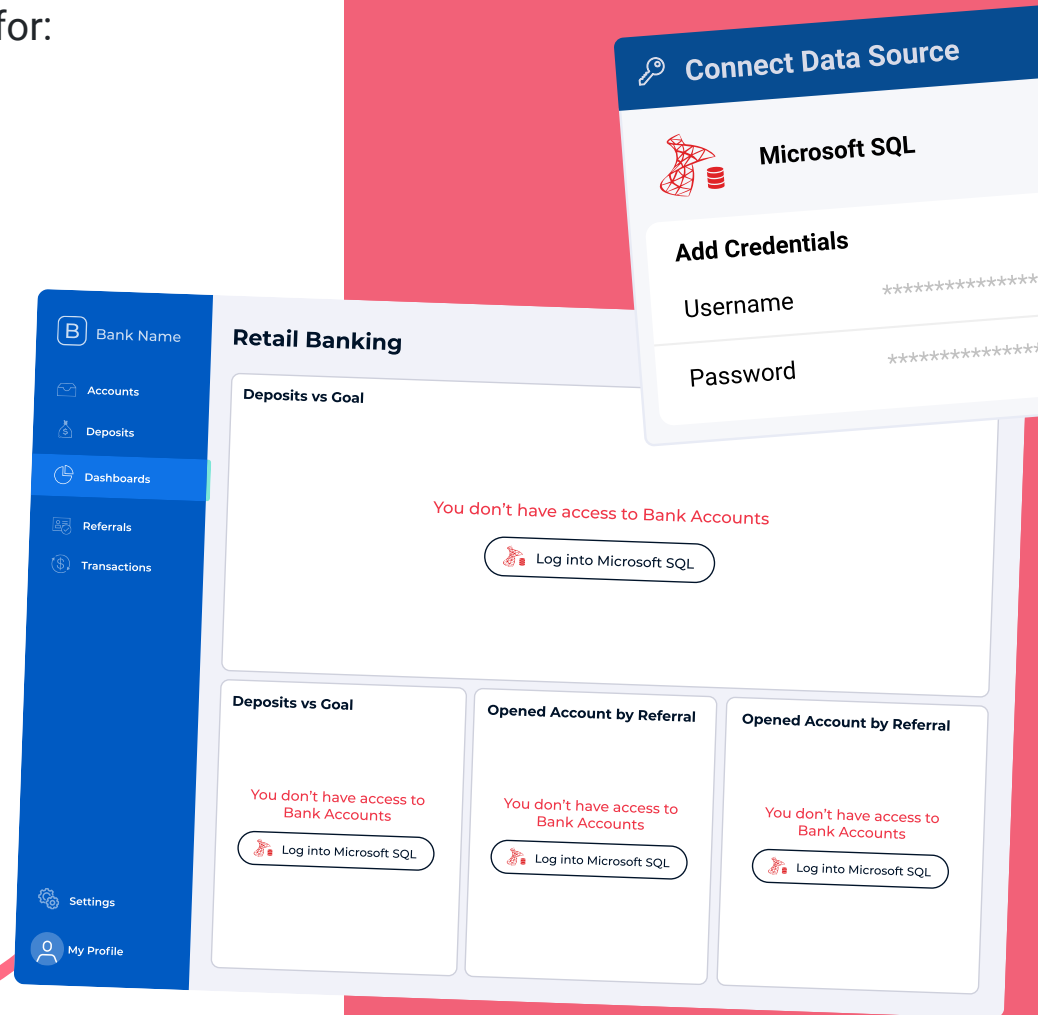
- ✓ API-driven approach (both client and server) to show or hide available features
- ✓ Built-in themes that support light and dark models
- ✓ CSS or property-based theming and branding options enabling custom theme creation to match your desired brand experience
- ✓ The ability to add custom buttons on visualizations with custom actions and to override existing default events in the API



# Security

Security is a paramount concern when implementing an embedded BI solution. Here are a few things to look out for:

- ✓ **Datasource-level authentication features like username and password, tokens, and OAuth**
- ✓ **Role-based access APIs**
- ✓ **APIs that simplify passing user context from client to server**



# Usability

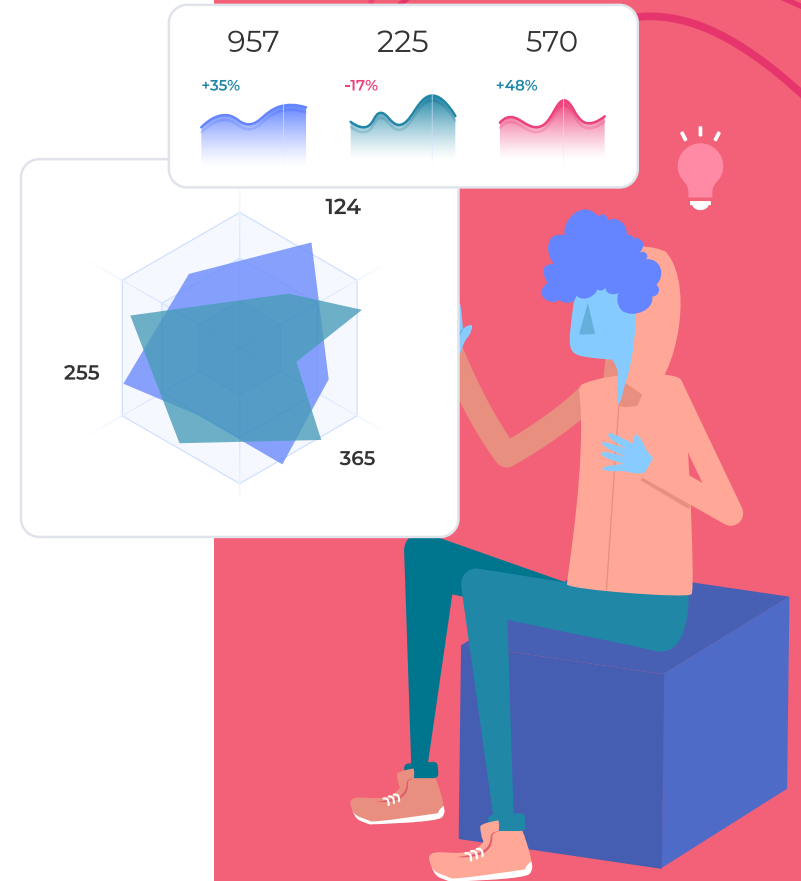
In the world of embedded BI, usability is the compass that guides your users through their data journey. The ease with which users can navigate, analyze, and interpret data is a fundamental aspect of a successful embedded BI solution.

## ✓ Self-service

The embedded BI tool shouldn't limit experienced users and overwhelm beginners. Look for a self-service tool that provides your users with the ability to analyze data and create beautiful dashboards independently.

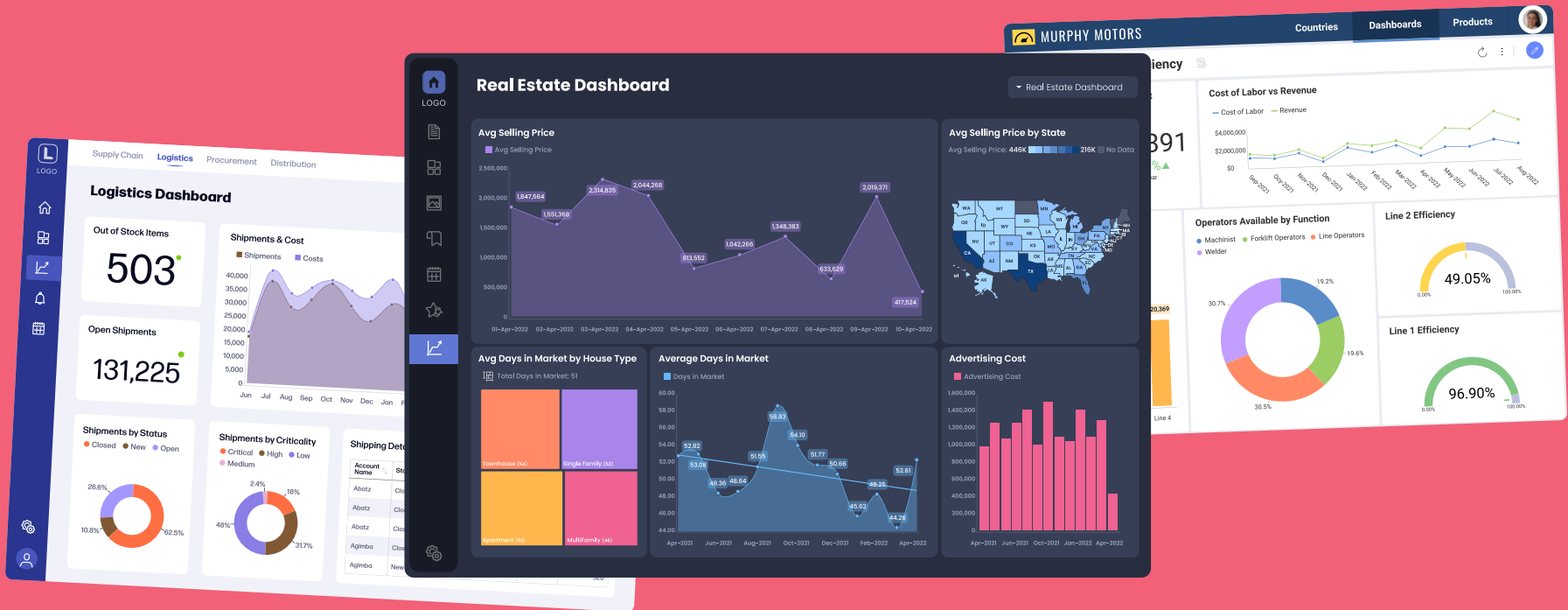
## ✓ Learning Curve

How steep is the learning curve, especially for non-technical users? Does the vendor provide onboarding resources to ease adoption?



# Vendor Support

Choosing the right embedded BI vendor is not only about the tool's features but also about the support ecosystem it offers. Make sure that the vendor will provide you with the resources you need to overcome any technical challenges and more.



## Documentation

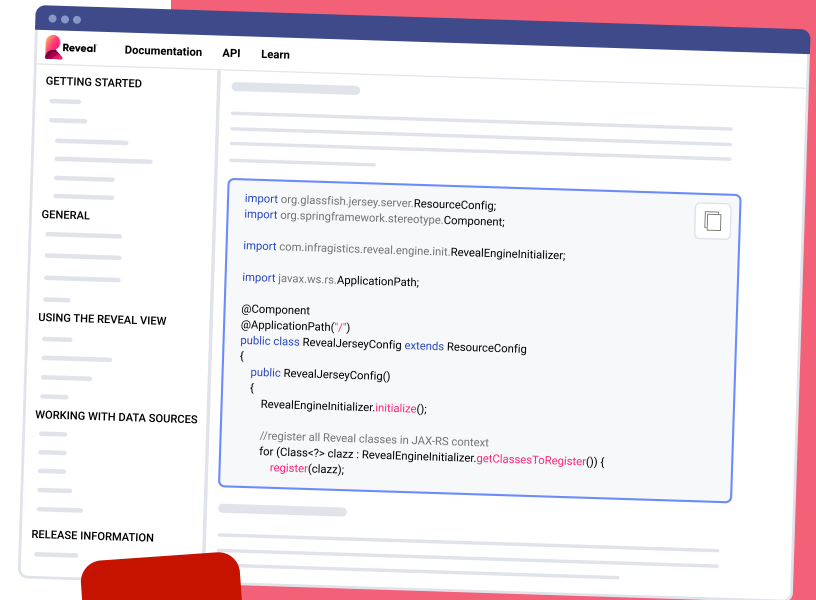
Comprehensive documentation, tutorials, videos, and how-to content are crucial. Clear documentation should be readily available, guiding developers and end-users through the implementation and usage processes.

## Customer Support

A combination of live and self-service support options, and experienced professionals must be available to help you with any technical questions.

## Community

An active user community can help you share best practices and experiences with others so anyone can benefit and help each other grow and succeed.





# Pricing & Licensing

Understanding the pricing and licensing aspects is crucial for a successful partnership with your chosen vendor. Ensure the embedded BI solution investment aligns with your budget and delivers the expected return on investment (ROI).

## ✓ Pricing Model

Is the pricing model aligned with your budget and ROI expectations?

## ✓ Licensing

Confirm that the licensing model meets your deployment requirements.


## ✓ Free Trial

Make sure there is a free trial to test the product before investing.



# About Reveal

Reveal is more than just an embedded analytics tool; it's a game-changer for businesses aiming to integrate powerful, customizable analytics into their apps seamlessly. From branding to deployment, we ensure your dashboards resonate with your brand. Let us handle the technicalities so you can focus on scaling your business.

 **Customize Completely**

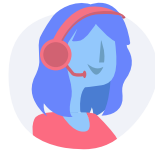


Dive deeper into the Reveal experience—here are a few ways to do so:



### Book a Demo

See Reveal in action and learn how it can accelerate your business.



### Talk to an Expert

Book a call with our sales team and get answers to all your questions.



### Download our SDK

See for yourself how easy it is to integrate reliable and self-service analytics directly into your existing website or application.

## Connect with our Senior Product Manager

Casey Ciniello can also answer all your product-related questions.



### Casey Ciniello

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