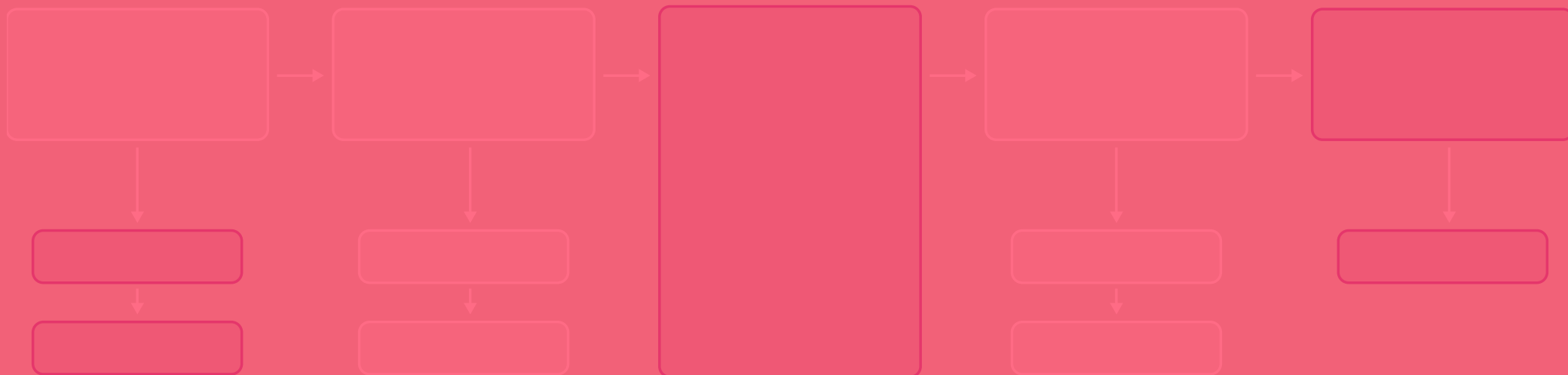


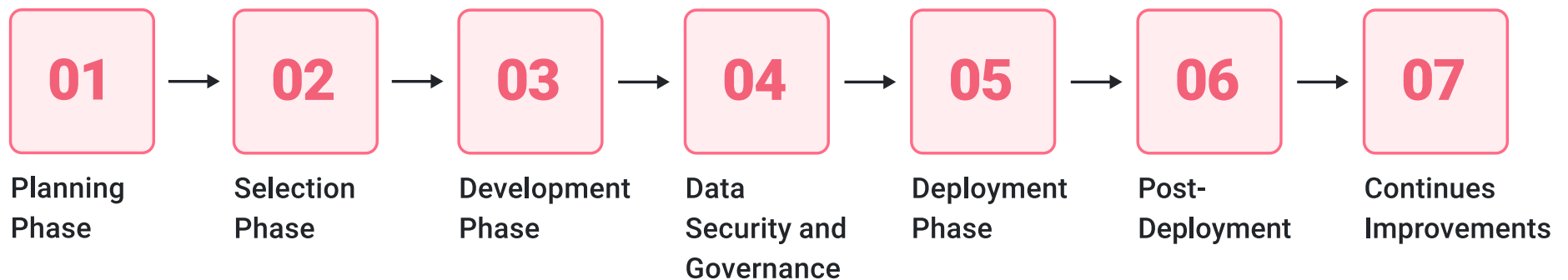


# End-to-End Embedded BI

## Deployment Guide



Implementing Embedded Business Intelligence (BI) in your organization helps you make informed decisions based on data. However, it's not easy to do. Embedded BI is complicated, with many choices and challenges. Our “End-to-End BI Deployment Guide” is a detailed checklist to help you understand and use embedded BI effectively.



## 1 Define Objectives

- Determine the need for an SDK, hosted, or hybrid BI solution
- Decide if a complete white-label solution is required
- Assess whether an iFrame solution is sufficient or if an embedded white-label solution is needed
- Evaluate if you have a development team available to integrate the solution



## 2 Identify Your Audience

Determine the BI solution users and their data requirements. By identifying your audience, you can tailor your analytics solution to deliver insights that matter most to them.

- Identify if there are non-technical users who will consume dashboards
- Identify any technical/power-users responsible for creating/editing dashboards
- Identify any IT/data science technical user roles



## 3 Define Deployment Scope

Identify whether it's for a specific department, organization, or external clients. Understanding the scope ensures you allocate resources effectively.

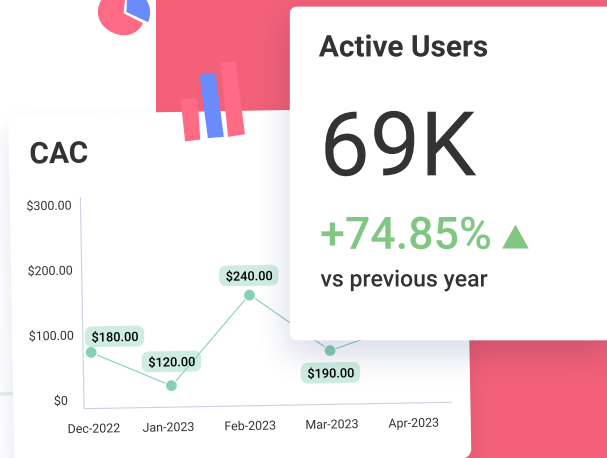
- Specify if the deployment is internal to your own users within your custom application
- Decide if it's a SaaS application hosted in the cloud
- Assess if it's an on-premises application deployment for your customers



## 4 Select KPIs

Choose the metrics crucial for your business needs. By selecting Key Performance Indicators (KPIs), you define what success looks like for your analytics initiatives.

- List key measurements that are necessary for users to drive data-driven decisions
- Identify what audiences need to see each KPI



KPI%

## 5 Data Source Identification

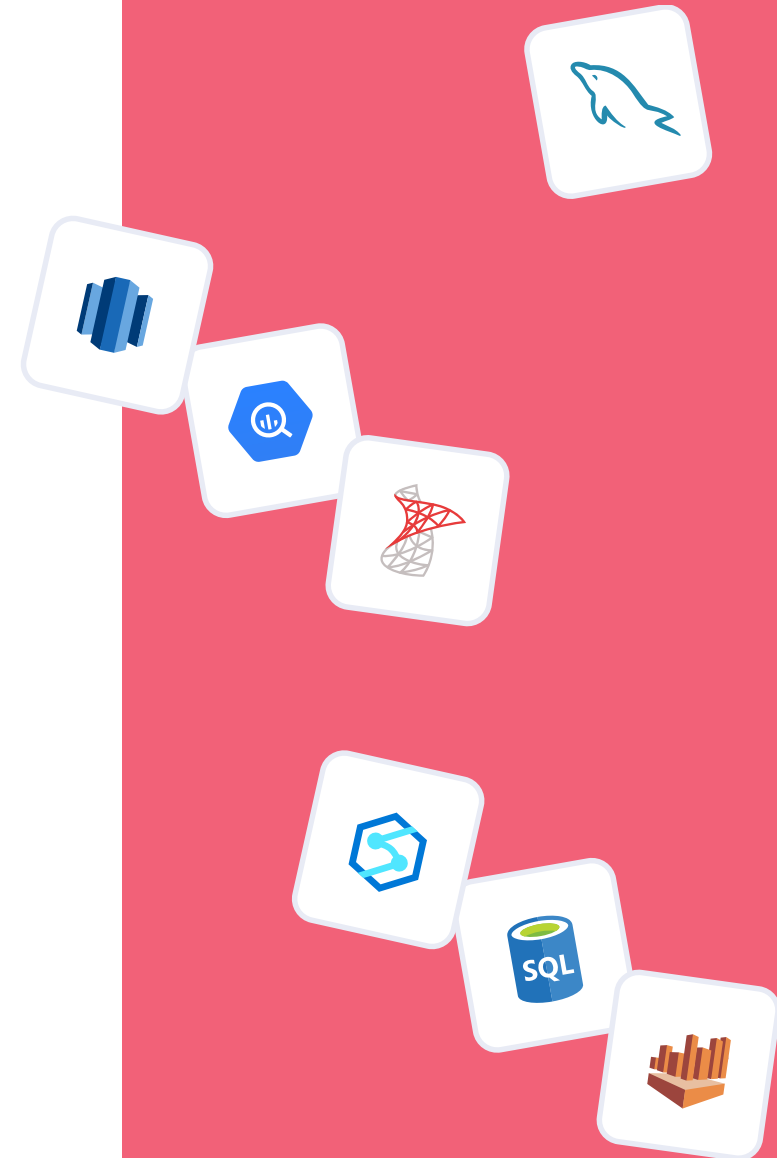
List all data sources connected to the BI system. A thorough understanding of your data sources ensures data quality and comprehensive insights.

- Decide if your data is on-prem or cloud data sources
- Determine if your data is a database or REST endpoint
- Review if your data is in a format that is ready for dashboard creation or end-user consumption

## 6 Budget Assessment

Determine the budget for the BI project, including software, hardware, training, and maintenance. This step is crucial for managing expectations and resources effectively.

- Determine your budget for the BI project
- Decide if you want a fixed-price solution, or pay-per-user, or editor



# Selection Phase

The selection phase is where you evaluate potential embedded BI vendors, assess their compatibility with your technical stack, and make the critical decision of who to partner with.

## 1 Vendor Research

Conducting thorough research on potential vendors is crucial for any business looking to make informed decisions. This process involves gathering information on the vendors' products, services, reputation, and pricing to evaluate their suitability for the organization's needs.

- Understand the product maturity
- Look into the support capability
- Review site mentions
- Research the company's history



### 2 API and SDK Evaluation

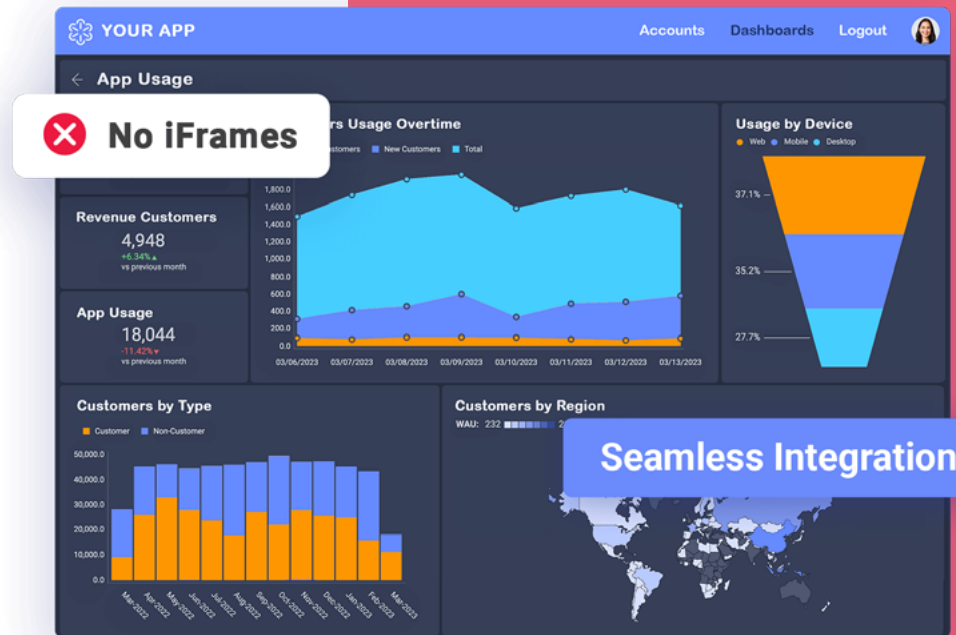
Assess if the selected BI tool's API/SDK seamlessly integrates with your existing technical stack to ensure compatibility and a smooth integration process.

- Assess the compatibility of the tech stack of the vendor's solution – cloud / SaaS, desktop, or modern-web
- Assess the compatibility of backend server integrations such as NodeJS, Java, or .NET Core

### 3 Development Languages

Make sure the BI solution is compatible with popular development languages.

- Compatible with C#
- Compatible with JavaScript
- Compatible with TypeScript





## 4 Documentation

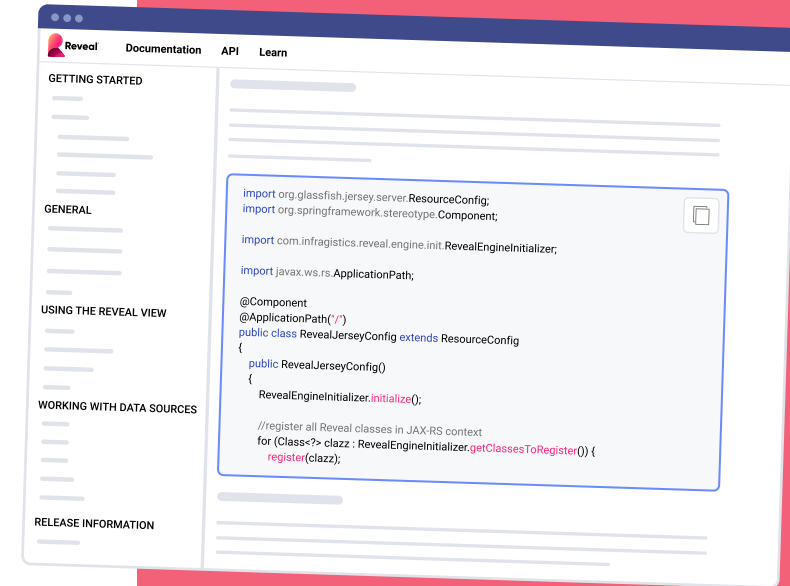
Is comprehensive documentation available for data sources, processes, data models, and report/dashboard development?

- Check for comprehensible how-to and API documentation
- Make sure feature demos are readily available in your required programming language

## 5 Training

Train users to effectively utilize the BI tool. User training enhances user adoption and ensures users leverage the tool to its full potential.

- Determine if the vendor offers training
- Find out if the vendor offers deep-dive sessions with your product team



## 6 Feature Comparison

Prioritize features aligned with your unique business requirements. Consider features that empower your users to extract maximum value from the analytics solution.

- Check if the vendor's roadmaps are public and accessible
- Review prior release notes
- Understand the release cadence of the product

Vendor 1	Vendor 2	Vendor 3
✓	✗	✗
✓	✓	✗
✓	✗	✓
✓	✗	✗

## 7 Demo and PoC Testing

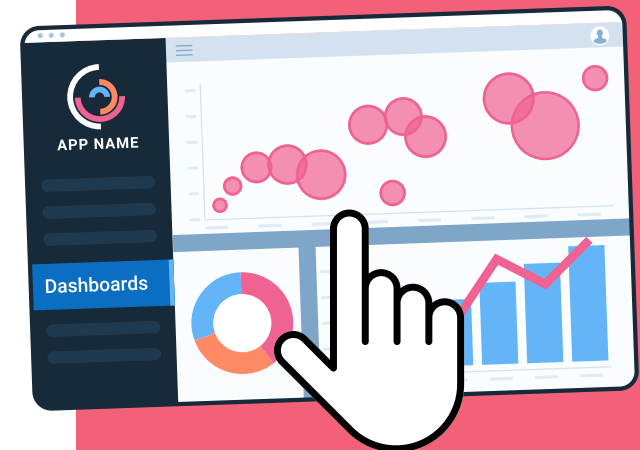
Request demos and conduct a proof-of-concept test. Hands-on experience allows you to evaluate the BI tool's usability and suitability.

- Make sure overview and technical demos are readily available
- Request technical demo that match your tech stack
- Request to meet with all stakeholder groups in your organization that require demos for evaluation

## 8 Select a Vendor

Make the final decision based on various factors, including pricing, features, security, support, and scalability. Choose a vendor that aligns with your long-term vision.

- Make a final decision based on factors such as pricing, features, security, support, and scalability



# Development Phase

The development phase focuses on implementing and customizing the chosen BI solution. It's where your analytics solution starts taking shape.



**Data  
Integration**

**Data  
Security**

**UI/UX  
Customization**

**Performance  
Testing**

### 1 Data Integration

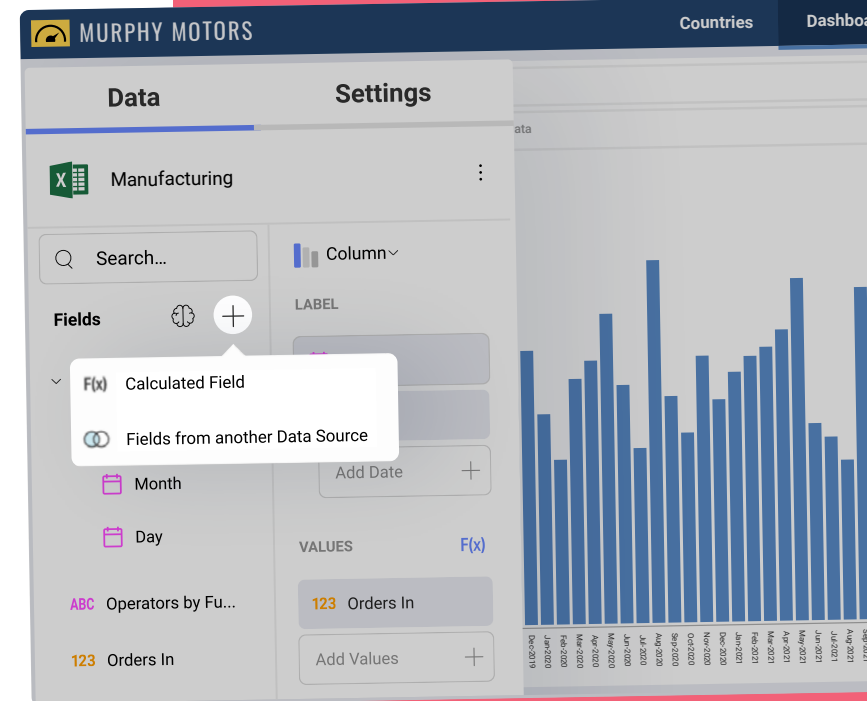
Connect the BI solution to data sources to ensure data quality and consistency. Data integration is the backbone of meaningful analytics.

- Ensure the data connectivity works within your current security scheme
- Make sure data connectors are provided for your data sources
- Understand if the BI solution works with multiple data sources

### 2 Data Security

Implement role-based access control for data security and compliance. Protect sensitive data and ensure that users access only what they're authorized to see.

- Ask if role-based security for your data is available in the BI solution

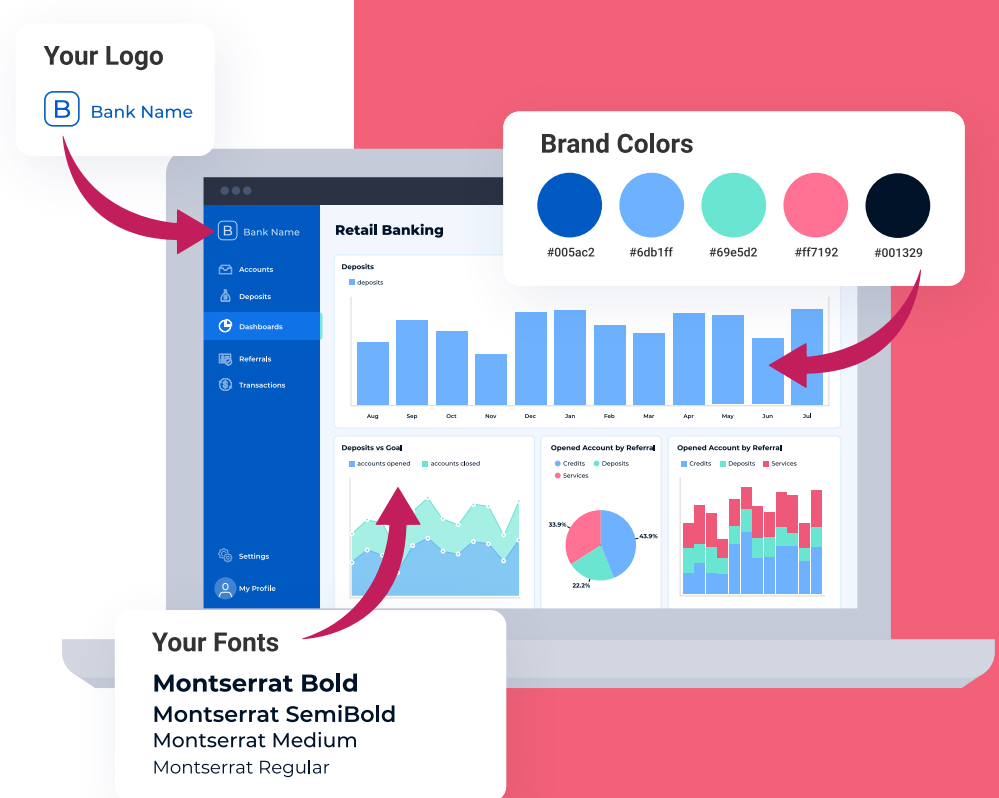


- Ensure the client and server can be further secured according to your security policies
- Ensure there are multiple checkpoints for data security in the API lifecycle

### 3 UI/UX Customization

Customize the user interface to align with your brand. A visually appealing and intuitive interface enhances user adoption.

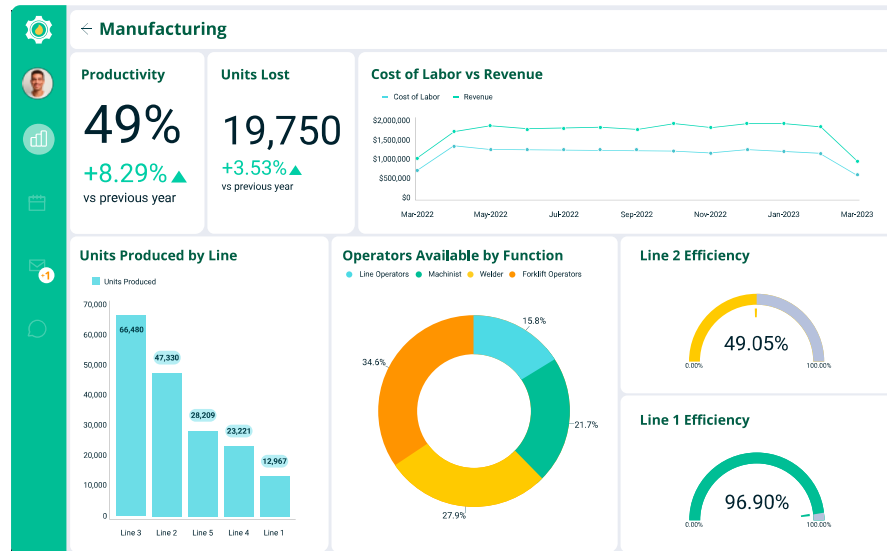
- Ensure you can match the embedded solution to your brand experience
- Understand if the brand experience is customizable per customer and deployment
- Review if there are necessary UX APIs that enable/disable interactions on the client UI



### 4 Performance Testing

Ensure the BI tool meets performance benchmarks.  
Performance testing guarantees your users a seamless experience even under heavy workloads.

- Ask if the vendor has technical guidance on performance optimizations
- Review whether the vendor customers are representative of your performance needs



### BI Tool Performance

92%

100%



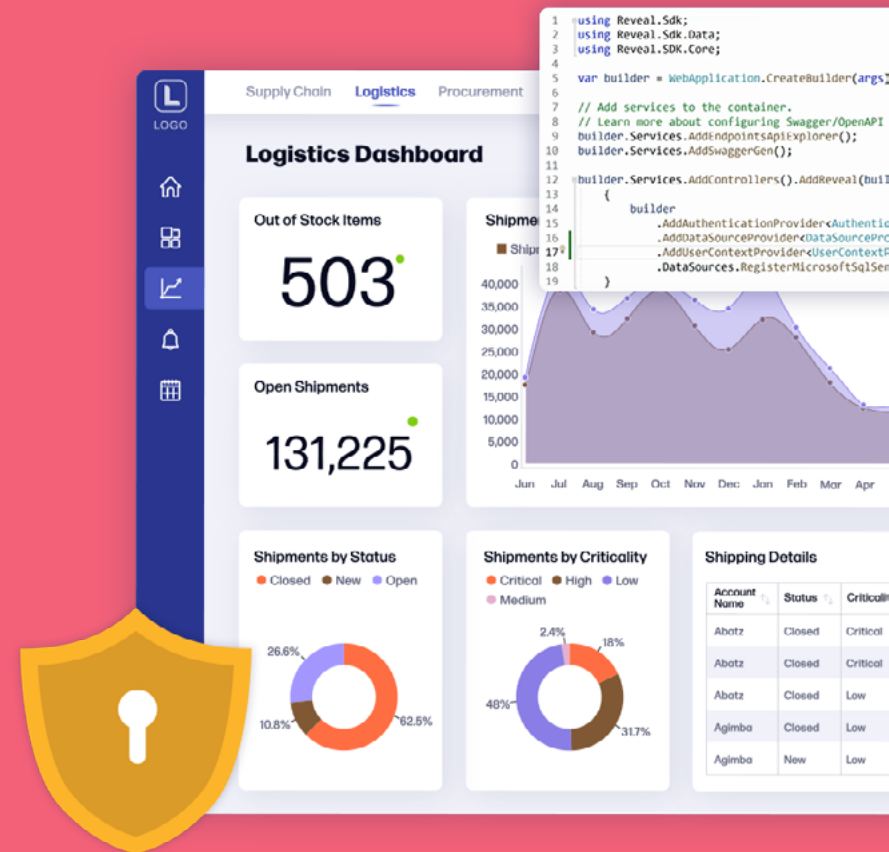
# Data Security and Governance

In this phase, you'll focus on safeguarding your data and ensuring compliance with industry regulations.

## ✓ Compliance with Regulations

Ensure the vendor's policy complies with relevant data protection regulations.

- Make sure the vendor has GDPR measures in place
- Make sure the vendor has CCPA measures in place
- Make sure the vendor can provide SOC2 compliance certificates on demand





# Deployment Phase

The deployment phase marks the transition from planning and preparation to actual implementation. Your BI solution becomes accessible to users.



## ✓ Solution Deployment

Configure servers, databases, and security settings. A well-prepared environment is the foundation for a successful deployment.

- Ask if the vendor provides ready-made PoC to build on
- Understand if the BI solution can be deployed in Docker or Kubernetes on any cloud
- Ask if the BI solution can be deployed as part of your existing application

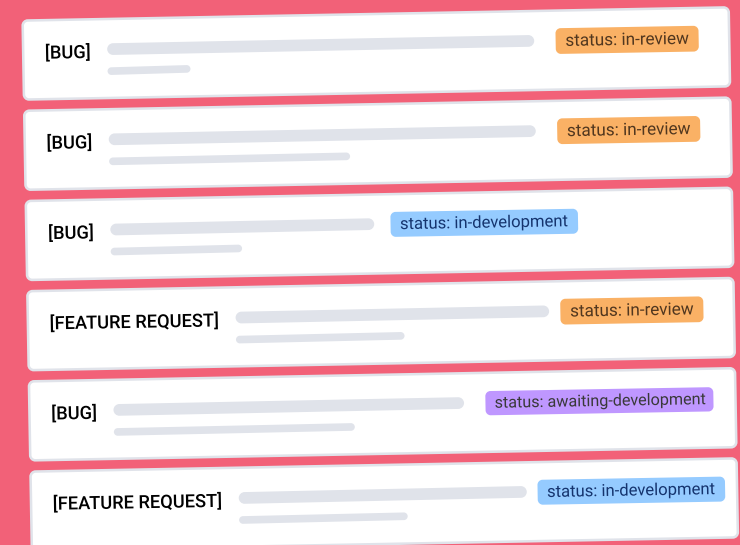
# Post-Deployment

Post-deployment is about ensuring the ongoing success of your embedded BI solution, including user training, support, and monitoring.

## ✓ Updates and Upgrades

Keep the BI tool up to date with the latest features and security patches.

- Ensure the vendor provides regular, consistent updates with bug fixes and security patches
- Ensure framework versions (Angular, React, .NET, Java, etc.) are kept up to date to ensure your analytics solution remains at the forefront of technology



# Continues Improvements

## ✓ Feedback Loop

Establish a feedback loop to gather user input and improve the BI solution over time.

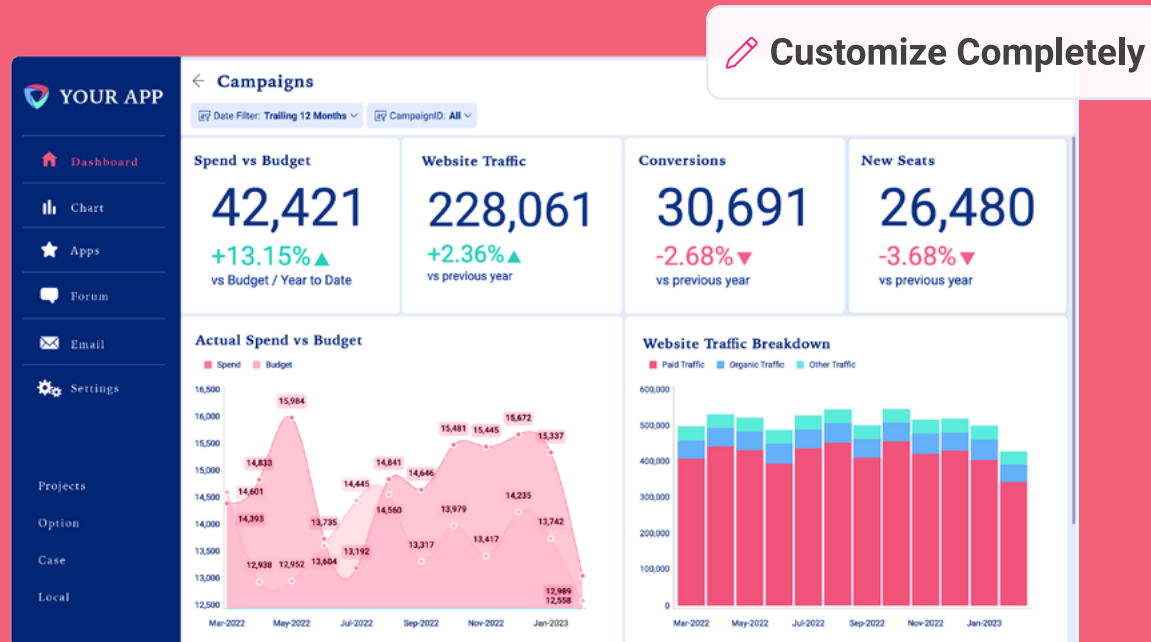
- Check if the vendor provides a channel for product improvement
- Understand if roadmaps and backlogs are public and visible on demand
- Ask if you can meet regularly with the vendor throughout the year to discuss product issues/enhancements



# About Reveal

Reveal is a leading embedded analytics solution, purpose-built to provide ease of use for integrating powerful analytics capabilities into applications. With Reveal, you have control over branding, feature customization, security implementation, and deployment.

We bring industry knowledge, robust IT infrastructure, and domain expertise, allowing you to focus on your business growth while we handle the rest.



Explore Reveal:



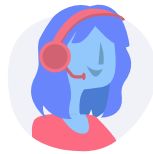
### Book a Demo

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



### Download our SDK

Experience firsthand how simple it is to integrate reliable self-service analytics into your existing website or application.



### Talk to an Expert

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



### Join our Discord Channel

Our product team is available to assist with any questions or roadblocks you may encounter while using Reveal.

## Connect with our Senior Product Manager

Casey Ciniello is ready to address all your product-related inquiries.



### Casey Ciniello

Reveal's Senior Product Manager  
[cciniello@infragistics.com](mailto:cciniello@infragistics.com)