IntelliFront BI Internal Evaluation Guide

Create reports, dashboards and KPIs your team can use

Start with a question your team needs to answer. This guide helps you turn that question into working reports, dashboards and key performance indicators (KPIs), then test them with the people who will use them. Share the results with your business sponsor, IT, security and procurement teams.

What you are evaluating

IntelliFront BI is an on-premises business intelligence platform with browser-based tools for creating native reporting content. Your evaluation should show whether your team can connect the right data, explain it clearly, explore it interactively and share it with the right audiences.

Choose a useful first project

For example, a service team might ask: “Where is work building up, and which team needs help?” A pilot could combine an open-work dataset, a dashboard showing workload and trends, two KPI cards and a canvas for the morning review. The examples throughout this guide illustrate possible uses.

Agree success before you begin

- Choose a report owner, a data owner and a few readers. Ask IT to provide the evaluation environment and connections.
- Agree the calculations, update frequency and questions readers must be able to answer. Set acceptable load times for realistic data volumes.
- Record the current effort involved so you can compare the pilot with today’s process.

What to have at the end

Aim for a validated dataset, a native dashboard with useful visuals and interactions, two checked KPI cards, and an audience-specific canvas. Add a workflow if the business question calls for an automated response. Test everything through reader accounts before making a decision.

The main evaluation uses IntelliFront BI’s native capabilities. Optional existing-report integrations, Gizmos and API extensions are covered on the final page.

Explore the details Product overview | Knowledge base

EVALUATION 1

Connect and validate your data

Give every visual a dependable starting point.

Why this matters

A dashboard earns trust when its figures match the source and readers know when they change. Start with a manageable dataset whose meaning your team understands.

What to explore

- Build datasets from database queries or Excel files. Use the query builder or your own SQL and preview the results.
- Configure caching to store dataset results and update them on a schedule. Choose whether an update replaces stored data or adds to it.
- Set query retry rules and inspect the caching history for query datasets.

Try it with your data

1. Choose fields that answer your pilot question. For the service example, these might include a record identifier, team, region, status and relevant dates.
2. Compare record counts and a sample of values with the source. Check how the query handles missing values and duplicate records.
3. Set an update schedule. Add a test record and change another, then observe when the dataset reflects each change.
4. Test an unavailable source in the evaluation environment. Review the recorded outcome and the recovery steps.

A successful result

The dataset agrees with the source, updates within your chosen interval and handles changes as expected. The data owner can explain the query and the team knows how to investigate a failed update.

Keep this evidence

Save the query or source definition, reconciliation results, measured update delay and the name of the person responsible for maintenance. Use realistic volumes to check the effect on source systems.

Explore the details Configure datasets

EVALUATION 2

Choose visuals that answer questions

Build a useful report rather than a screen full of charts.

Start with the decision a reader needs to make. IntelliFront BI includes grids, pivot tables, charts, cards, gauges, treemaps, scatter charts and maps. Choose a small set that makes your pilot question easier to answer.

Question to answer	Visuals to consider	What to check
Where are the detailed records?	Grid	Readers can locate and interpret the records behind a total.
How do teams or periods compare?	Chart or pivot table	Categories, dates and totals use the right grouping.
How is the mix distributed?	Pie chart or treemap	Parts are clearly labeled and reconcile to the whole.
How does performance compare with a target?	Dashboard card or gauge	Actual values, targets and units are easy to distinguish.
Are two measures related?	Scatter chart	The chosen measures and individual points are meaningful.
Where is activity concentrated?	Geo point, choropleth, bubble or pie map	Locations and geographical groupings match the data.

For more specialized questions, the visual library also includes Gantt, polar and funnel visuals. Evaluate these when they suit your data and the decision being made.

Try it with your data

Build three complementary visuals for the same question. In the service example, compare workload by team, show activity over time and include a grid of the underlying records. Give each visual a clear title, readable labels and consistent units.

A successful result

A reader can explain what each visual shows and use it to answer the pilot question. Totals reconcile across the views, and any required PDF, image or Excel export remains useful.

Explore the details Create native dashboards | Dashboard cards | Pivot tables

EVALUATION 3

Explore the detail interactively

Let readers follow a question without asking for another report.

What to explore

Use chart master filtering so a selection filters other dashboard items. Configure drill-down to move between summary and detail. Date selections, range filters, list boxes, combo boxes and parameters can help readers narrow the view. Cascading parameters let one selection determine the choices available in another.

Try it with your data

1. Choose a hierarchy that readers recognize, such as region followed by team. Configure a chart with a useful drill-down path.
2. Enable master filtering on a suitable visual. Select one region and check which other items change.
3. Add a date or range selection and test a period with known results. Where relevant, add related parameters and confirm their available choices.
4. Clear or reset the selections, return to the wider view and check a selection that returns no records.

A successful result

Readers can move from the overall picture to the records that need attention, understand which selections are active and return to the starting view. Each interaction produces the expected totals.

Questions to resolve

Which visuals should respond together? Should any item retain its broader context? Can a reader identify an empty result without mistaking it for a system failure?

Keep access controls separate

Evaluate reader permissions as well as interactions. A filter or parameter used to explore a dashboard must not be the only protection for confidential customer or departmental data.

Explore the details Chart interactivity | Cascading parameters

EVALUATION 4

Create KPIs people can trust

Make the measure, its target and its meaning clear.

What to explore

Create standalone KPI cards from a dataset and column. Select the aggregation, rounding, units, target and whether the target is met above or below the chosen value. Set a useful name, description, color and glyph, then assign the intended groups.

Dashboard card visuals serve a related purpose inside a dashboard: they can compare actual and target values, with delta and sparkline options. Evaluate these separately from standalone KPI cards used on a canvas.

Try it with your data

1. Define two measures and their reporting periods. For the service example, use an open-work count and a second measure that helps the team understand progress.
2. Agree the calculation and target with the data owner. Check each value independently, including rounding and units.
3. Test a value above and below the target. Confirm that the direction represents success correctly.
4. Change the source data and check the displayed result after the required dataset and display updates.

A successful result

Readers understand what each KPI means, which period it represents and how it compares with the target. Values reconcile with the source and change within the agreed interval.

Keep this evidence

Record each definition, target owner, expected result and measured update timing. If the team needs notifications, test a separate workflow against the required business condition; setting a KPI target alone does not create an alert.

Explore the details Create KPI cards | Dashboard cards | Workflows

EVALUATION 5

Build a canvas for your audience

Bring the daily reporting view together in one place.

Why this matters

A manager may need headline measures and more than one dashboard during the same review. A canvas brings selected KPI cards and dashboards together, so the audience has a useful starting point.

What to explore

- Select existing KPI cards and dashboards and add them to a canvas.
- Give the canvas a name and description that explain its purpose, then assign the relevant groups.
- Choose a favorite canvas as a default and configure the KPI update interval through application settings.

Try it with your data

1. Create a morning-review canvas for the service team using your validated KPI cards and native dashboard.
2. Add another dashboard only if it answers a different question the same audience needs. Check the current canvas item limits for your build.
3. Open the canvas through a reader account. Check the underlying dashboard and KPI permissions as well as the canvas assignment.
4. Update the source data and observe the displayed KPI values. Ask readers whether the content and layout support their review.

A successful result

The audience can open the canvas, understand the headline position and reach the supporting views without searching through unrelated content. Values update as expected and the reader sees only permitted information.

Keep this evidence

Record the audience, included items, update timing and reader feedback. Check the page on the screens people will actually use.

Explore the details Create canvases | Create KPI cards | Manage groups

EVALUATION 6

Turn a business condition into action

Test a useful workflow alongside the reporting.

What to explore

Workflows can monitor database feeds for new, modified or existing records, or look for files through an FTP feed. Available actions include email, a delay, running a SQL query, downloading an FTP file and running a Gizmo. Multiple actions can form a sequence.

Try a focused scenario

For the service pilot, try a query that identifies newly qualifying overdue work. Configure a workflow to monitor that result and email the responsible team. Design the feed and query around the condition you want to detect, then test when it triggers.

1. Define the exact condition, who should be notified and when the condition should be checked. Start with one feed and one email action.
2. Create a test record that qualifies and confirm the recipient, message and timing.
3. Test a non-qualifying record and a later change to the qualifying record. Check whether repeated checks cause duplicate actions.
4. Test an unavailable connection or failed action. Establish how the owner will detect and resolve the failure.

A successful result

The action runs for the intended condition, reaches the right recipient and behaves predictably on repeated checks. The owner can identify a failure and recover without losing track of the business event.

Extend the workflow when needed

Add SQL, file or delay actions only when the process requires them. Use approved test data and appropriate database permissions. The optional Gizmo scenario is explained on the final page.

Explore the details Workflows

EVALUATION 7

Test the portal as a reader

Make useful information easy to find and safe to share.

What to explore

Use accounts, groups and permissions to organize access. Tags and Smart Collections help gather related content. Include customers, vendors or partners where they need their own reporting view; additional IntelliFront BI user licenses are not required for external readers.

Try it with your audience

1. Create an author account and two reader accounts with different permissions. Assign the relevant dashboards, KPI cards and canvases.
2. Ask each reader to find the right report and answer a real question without help. Review names, descriptions and tags where people hesitate.
3. Check direct links, required exports and any shared or embedded dashboard views. Verify both permitted access and rejected access.
4. If external access is part of the pilot, use two customer accounts with different data scopes. Check that each is prevented from reaching the other customer's information.
5. Disable an account and confirm access is removed. Check content with no explicit group assignment as well as assigned items.

A successful result

Readers can find and use the information intended for them. Authors have the maintenance permissions they need. Confidential content remains protected through navigation, direct links and any enabled sharing or export routes.

Keep this evidence

Record which account can see and change each item. Include reader feedback and the results of unauthorized-access tests. Have security review the external access design before inviting more users.

Explore the details Manage users | Manage groups | Use Smart Collections

EVALUATION 8

Confirm readiness for everyday use

Agree how your team will run and support the platform.

What to explore

IntelliFront BI runs in your environment using Windows, IIS and database components. Review the supported prerequisites for your selected build. Authentication options include Active Directory group linking, Microsoft single sign-on and two-factor authentication.

Try it with IT and security

1. Confirm the hosting design, network access, certificates and credentials. Identify who maintains the platform and who owns the reporting content.
2. Test the chosen sign-in method and the process for adding, changing and removing access.
3. Use representative data and simultaneous readers to measure load time and the impact of dataset updates during a busy period.
4. Test your backup and restore procedure and a connection failure. Record how service will be restored and who will respond.

Review the records you need

When enabled, the audit trail records API requests and retains entries for 72 hours. Arrange export and retention if your policy requires a longer history. Review the actual records against your requirements rather than assuming every business activity is covered.

A successful result

The platform meets the agreed performance and access requirements. Named owners understand updates, credentials, recovery and support escalation. The organization has an operating plan it can maintain after the pilot.

Confirm the commercial scope

Obtain a written quote covering the installation, unlimited-user scope, required add-ons, support and renewal terms. Include hosting, implementation, data preparation, administration and any third-party services in the budget.

Explore the details Installation prerequisites | Microsoft single sign on | Audit trail

Review the results and decide

Return to the question you started with. Can the intended readers now get a reliable answer, and can your team maintain the reporting behind it? Use the pilot results to decide what happens next.

Keep a small evidence pack

Keep the dataset definition, calculation checks, dashboard and canvas designs, test accounts, measured timings and reader feedback. Record the IntelliFront BI build and configuration used so the team can repeat the tests.

Decision area	Evidence of a successful evaluation
Data	Sample records and totals reconcile with the source; updates meet the required interval.
Native reporting	The chosen visuals answer the pilot questions and required exports remain readable.
Interaction	Selections, drill-down and resets produce the expected views and totals.
KPIs and canvas	Measures and targets are correct; the canvas helps the audience complete its review.
Workflow if needed	The intended condition produces the right action, with repeat and failure behavior checked.
Access	Authorized readers can use the content; unauthorized accounts cannot reach protected information.
Operations and cost	Performance, recovery, ownership and the written commercial scope meet the agreed needs.

Measure the business improvement

Compare the pilot with your starting process. Record time spent preparing information, repeated requests for reports and whether readers can answer follow-up questions themselves. Use observed results when making the business case.

Agree the next step

If the pilot meets your criteria, name the rollout owner, audience and timetable. Give each remaining issue an owner and a follow-up date. Resolve material gaps before wider use, and keep the working native content as the starting point for implementation.

Explore the details Product overview | Knowledge base

Extend the evaluation where needed

Choose these scenarios when they support your business requirement. You can complete the native reporting evaluation without adding them.

Bring existing reports into the portal

Optional Power BI, SSRS and Crystal Reports add-ons bring existing reporting content alongside native dashboards. Test a representative report with its real connection, credentials, parameters, reader permissions and required viewing or export options. Record add-on costs and third-party licensing requirements.

Schedule and distribute reports with Gizmos

A Gizmo groups one or more Crystal Reports or SSRS reports for execution and delivery. It can include triggers, multiple destinations and data-driven instructions, helping you schedule and distribute existing reports.

For a relevant pilot, configure one Gizmo, run it manually and then through its trigger. Check the generated reports, recipients and destinations. Review the last-run status, timing and queue. If a workflow runs the Gizmo, test when it starts and whether the workflow should wait for completion.

Connect an application through the API

The developer portal provides reference documentation, guides, recipes and Postman resources for supported analytics, user and reporting operations. Start with a read-only native KPI request and compare the result with the application.

Use the installation's API URL. The IIS web application normally uses HTTPS port 443; the API normally uses port 50255. Ask the administrator to confirm the API's protocol, host, port and any application path. Check the calling identity's permissions and how the integration handles errors.

What to record

Keep the reason for each extension, its additional dependencies and the test results. Approve it on the evidence from your own reporting environment.

Explore the details Gizmos | Workflows | Developer portal