# BI Practice – By Cognitive Convergence (Rev1)



**Cognitive Convergence** is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents.

We offer Power BI consulting services covering solution architecture refinement, customization, integration, transformation, visualization and analytics to uncover insights hidden within data and enhance data exploration.

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#### **OBJECTIVE**

Objective of this paper is to describe competency solution of BI practice. Different tools of BI are explored and their comparison and market competency. Different dimensions of BI solutions such as self-service BI, cloud BI and Distributed model for BI will discuss. Power BI development services provided by cognitive Convergence followed by few of the client dairies of cognitive convergence will discuss here.

#### **BUSINESS INTELLIGENCE**

BI (Business Intelligence) is a set of processes, architectures, and technologies that convert raw data into meaningful information that drives profitable business actions. It is a suite of software and services to transform data into actionable intelligence and knowledge.

BI has a direct impact on organization's strategic, tactical and operational business decisions. BI supports fact-based decision making using historical data rather than assumptions and gut feeling.



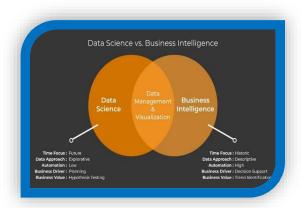
#### **DATA SCIENCE**

Data science is basically a field in which information and knowledge are extracted from the data by using various scientific methods, algorithms, and processes. It can thus be defined as a combination of various mathematical tools, algorithms, statistics, and machine learning techniques which are thus used to find the hidden patterns and insights from the data which helps in the decision making process. Data science deals with both structured as well as unstructured data. It is related to both data mining and big data. Data science involves studying the historic trends and thus using its conclusions to redefine present trends and also predict future trends.



# **Data Science and Business Intelligence**

It is important to begin with some basic definitions of the two terms, taking a deeper look at the two distinct (though closely allied) fields within Data Analytics. Data Science, as used in business, is intrinsically data-driven, where many interdisciplinary sciences are applied together to extract meaning and insights from available business data, which is typically large and complex. On the other hand, Business Intelligence or BI helps monitor the current state of business data to understand the historical performance of a business.



# **Business Intelligence and Business Analytics**

Since business intelligence focuses on current situations and business analytics determines future situations. Business analytics (BA) refers to the practice of using company's data to anticipate trends and outcomes. BA includes data mining, statistical analysis, and predictive modeling that help make more informed decisions.

Data analytics is the technical process of mining data, cleaning data, transforming data, and building the systems to manage data. Data analytics takes large quantities of data to find trends and solve problems. Data analytics is used across disciplines—from government to science. It's not just confined to business applications.



# **Business Intelligence and Artificial Intelligence**

BI and AI are distinct but complementary. The "intelligence" in AI refers to computer intelligence, while in BI it refers to the more intelligent business decision-making that data analysis and visualization can yield. BI can help companies bring order to the massive amounts of data they collect.



#### HOW BUSINESS INTELLIGENCE WORKS

Businesses and organizations have questions and goals. To answer these questions and track performance against these goals, they gather the necessary data, analyze it, and determine which actions to take to reach their goals.

Raw data is collected from the business's activity. Data is processed and then stored in data warehouses. Once it's stored, users can then access the data, starting the analysis process to answer business questions.



#### **TOOLS FOR BI**

Business intelligence makes sense of the modern data landscape, which grows increasingly more complex and digitized. It follows that picking the right BI tools for company makes all the difference in deriving meaningful insights from data and making better business decisions. BI tools perform data analysis and create reports, summaries, dashboards, maps, graphs, and charts to provide users with detailed intelligence about the nature of the business.



#### Power BI

Microsoft Power BI is an analytics and data visualization tool that enables users to connect to a wide variety of data sources and create reports and dashboards. Though it originally emerged as an add-on to Microsoft Excel, Power BI has since grown to stand on its own as a formidable product that fulfills the needs of all companies, from small businesses to large enterprises. Its highlights include seamless integration with Microsoft Office technologies, powerful data preparation and data querying capabilities, a drag-and-drop data visualization builder and a perpetually free version.



#### **Tableau**

Tableau is a data visualization solution that excels in helping businesses turn their data into actionable insights through interactive dashboards and stories. With a high degree of customization and security options, it offers users considerable control over their data storytelling. Through a user-friendly interface and intuitive drag-and-drop functionalities, it encourages users of all technical skill levels to create and explore data visualizations. While Tableau Desktop is the main offering, it comes as a part of several different packages that pair it with a license for Tableau Server or Tableau Online.



# Qlik

QlikView is a data discovery and analytics platform from Qlik Technologies that helps companies make data-driven decisions by making insights accessible to business users. Built for speedy deployment and quick configuration, it connects directly to and pulls information from almost any data source and then allows users to analyze all their data and build visualizations that convey its story effectively. Its differentiators include the Qlik Associative Engine, which indexes every possible relationship among data to render faster insights and enable associative analysis, a data governance dashboard and wizards for alerts, reporting and more. Though the vendor encourages users to move to its cloud-based QlikSense platform, it continues to provide updates and support for QlikView, as it remains a strong competitor in the business intelligence field.



# Microstrategy

Microstrategy is a modern analytics and Business intelligence platform offered by Microstrategy Inc. Microstrategy's business analytics and mobility platform helps enterprises build and deploy analytics and mobility apps to transform their business. It offers federated analytics, mobility, predefined contextual insights within existing applications like Microsoft Outlook desktop, web and mobile applications. The Microstrategy data visualization tool is just one of the products that the company has to offer. The company goes by the motto "Take analytics into your own hand" when it comes to their data visualization tool. The tool vouches for flexibility and speed of data study without losing on the scalability and security that an enterprise analytics environment has to offer.



#### **COMPARISON BETWEEN TOOLS**

Features	Power BI	Tableau	Qlik	Microstrategy
Purpose	BI tool to analyze business and BI insights	BI and data analysis tool to generate reports and data visualization	BI tool which is used for converting raw data into knowledge and offers data visualization in a meaningful and innovative way.	Micro Strategy's business analytics and mobility platform helps enterprises build and deploy analytics and mobility apps to transform their business.
Data sources	Limited access to other databases as compared to tableau	Access to more data sources than PBI	Almost all types of datasets	Connect to and blend data from any source.
Data Capacity	10 GB	Millions	250 GB	

Data Visualizati on	Power BI provides interactive and user friendly wide range of visualization	Provide intuitive and user-friendly data visualization platform	Qlik Sense is a Data Visualization Powerhouse	Microstrategy provide data visualization
Machine Learning	Integrated with Microsoft azure allow ML based data understanding	Python is integrated, allow efficient ML operations over databases	ML support not fully available yet	Microstrategy can be used as a hub for machine learning
Mobile Intelligen ce	Yes	Yes	Yes	Yes
Cloud Intelligen ce	Yes	Yes	Yes	Yes
Tool users	Naïve users, experienced users	Experienced and analytical users	Experienced developers	Business Analysts, IT developers, and administrators.
User Interface	Dashboards are the key feature of Power BI when has a good User interface to publish the report.	User Interface is better	User Interface is quite down when compared with Tableau.	Exceptional User interface with Governed Self-Service
Ease of learning	User-friendly- Knowledge of Excel is enough	They do not require any technical or programming skills to work with.	Data science background is required	There are no prerequisites to learn Microstrategy
Supportiv e requireme nts	Power BI desktop, power bi online	R	Qlik consists of both front- end (Qlik Developer) and back-end (Qlik Publisher)	MicroStrategy offers an innovative integration with R
Developm ent type	Web n desktop	desktop	Web n desktop	Web n desktop
D3 visuals	Yes	No	Yes	yes
Pricing	Power BI Pro \$9.99/user/month Power BI Premium \$4,995/dedicated resources/month.	Tableau Creator \$70 USD/user/month Tableau Explorer \$35 user/month Tableau Viewer \$12 user/month	Professional User \$70/user/month, Analyzer User \$40/ user/month.	Creator \$70/user/month, Explorer \$35-\$42/user/month Viewer \$15/user/month.

#### MARKET COMPETENCY

Power BI comes out ahead of Tableau Qlik and Microstrategy when compared. It claimed the advantage 10 times – and across many of the most critical features — making it the more attractive choice. The tool suits best to business depend on the requirement and features need also on the pricing of these tools.



#### **POWER BI DEVELOPMENT SERVICES**

# **Reports and Dashboards**

Our team can provide advance analytics to data and help with forecasting to make sure departments meet business metrics and infused with machine learning capabilities, meaning to spot patterns in data and use those patterns to make informed predictions and run "what if" scenarios.

#### **Custom Connectors**

Custom Connectors for Power BI are modules that extend Power BI's capabilities to connect to data sources not covered by what's shipped with the product. Cognitive Convergence team provides data connector services that allow users to quickly build reusable models with general data.



#### **Custom visuals**

Cognitive Convergence leverages their expertise to offer services to develop custom visuals that give an amazing and user friendly customized visualization. Our team use its expertise to develop breathtaking custom visuals in .pbiviz file format. These Custom Power BI visuals are develop to meet visualization requirements beyond what is available today.

# **Custom Visual License Management**

Cognitive Convergence provide License Management to Custom Visual. Using License key and token for Power BI custom user. So that user can enter a key in order to use visual. Key show authorization of client. If key is valid user can have access to Power BI custom visual.

# Python Integration with Power BI

Cognitive Convergence provide amazing python scripts in Power BI to create dataset in Power BI Desktop, for modeling of data in Power BI Desktop, create attractive visuals in Power BI, Perform data cleaning and advanced data shaping.

# D3.js Integration with Power BI

Cognitive Convergence provide amazing d3.js standards in Power BI to provide 'lift and shift' of an existing D3.js visual and use it with Power BI and to access external services or resources

# Power Apps Integration with Power BI

We provide amazing Power Apps visuals in Power BI that Respond to a greater demand for actionable data, provide easily type in the parameters for a what-if analysis not just numbers but also text or other data, inventory dashboard and executive status dashboard

# **Power BI Maps**

Cognitive Convergence use maps that provide a strong analytics service, supports a handful of interactive map visualizations to gain insights into the geographical data.

# **Embed Power BI in Apps**

Cognitive Convergence embed Power BI to add analytics and interactive reporting to applications and provide Easy and secure embed reports in internal web portals and provide Row-level data security (RLS).

#### **Embed Power BI in Websites**

Cognitive Convergence embed Power BI to websites. It allows to embed visual analytics in products, so users and customers can gain valuable insights, and can get to market fast.

#### **Embed Power BI in Portals**

Our team embed Power BI to Embed reports in Microsoft SharePoint, Embed Reports in Microsoft Teams, Create secure internal Portals, Allows team to discuss the data within team channels

#### Mobile BI service

Cognitive Convergence team create a portrait layout for improving the experience of viewing reports in the mobile apps. Optimize Desktop report for good experience of phone layout report app.

# Power BI Template App

Our team provides packaging dashboards and reports for products and solutions in one bundle and enable customers to connect to app data and metadata and connect to third-party data sources. Provide complete control over who can access code and export data, innovative and reusable solutions that skip the arduous.

# POWER QUERY M FORMULA LANGUAGE

Our team use M query language for the development of Custom Data Connectors, for advance cleaning and transformation of data, to manipulate, filter and analyze the data for better insights, for better analytics and consulting services and have fullest potential use of data set.

# DATA ANALYSIS EXPRESSIONS (DAX)

Our data analysts use DAX expressions to provide better data modeling experience, have valuable insights of data and rich reports, and solve real business problems that affect bottom line reporting, provides implicit and explicit measures, use time intelligence relates to calculations over dates, months, quarters, or years.

# Power BI Integration with QuickBooks

Our team integrated Power BI with QuickBooks and help in visualizing finance data, uncover new insights into cash flow, profitability, and customers, refresh data on a schedule or on demand, monitor the latest income and expenses on the go with the native Power BI app for mobile device.

# Power BI Integration with Dynamic 365 Business Central

Our team integrated Power BI with D365 Business central to create effective visualizations and to create balance sheet in Power BI Desktop report using Business Central Data. Provides a flexible alternative to reports built in Business Central enabling drill down and customize the visualization.

# Power BI Integration with D365 Finance and Operations

Our team integrated Power BI with D365 Finance and Operations and personalize workspaces using D365 finance and operations. Presents data in a visual format, such as charts and graphs, enables you to view sales data trends over time, which can help your team predict customer buying behaviors and adjust your strategies for maximal impact.

#### Microsoft Power BI Rest API

Cognitive Convergence team use Power BI REST API, to create apps that integrate with Power BI reports, dashboards, and tiles. With Power BI REST API, it is possible to perform management tasks on Power BI objects and allows to embed reports, dashboards, and tiles for Power BI users and Non-Power BI users.

#### **JavaScript Based Development**

Cognitive Convergence use JavaScript library for embedding Power BI into apps. When included directly, the library is exposed as a global named powerbi-client.

# **Python Based Development**

The addition of Python integration in Power BI gives the user the ability to utilize amazing visual libraries such as Seaborn. Beyond visualization, we utilize some of the machine learning packages and also Power BI Rest API to integrate Power BI reports.

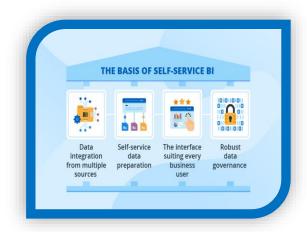
#### .NET BASED DEVELOPMENT

MICROSOFT.POWERBI.API is a .NET Client library for Microsoft Power BI public REST endpoints providing access to Workspaces, Reports, Datasets and more. Cognitive Convergence use Power BI API to provide service endpoints for embedding, user resources, and administration.

#### **DIMENSIONS OF BI**

# **SELF-SERVICE BI**

Self-Service BI, also known as ad hoc reporting, allows users the ability to develop rapid reports, empowering users to analyze their data. Self-Service tools provide users the option to build reports from scratch or modify reports without tying up developer resources. This gives end users the ability to assume control of their analytics needs and empower them to make decisions from their data and from within applications that have embedded self-services while simultaneously extending the overall agility of an organization's BI. Self-Service reaches beyond the static pre-defined data snapshots that traditional reporting often provides allowing for an enhanced interactive end user experience.



#### **Benefits**

- Improve agility and flexibility in business departments
- The reduced dependence on external resources allows business users to produce information and insight far more efficiently.
- Companies can glean insight from data efficiently by allowing iterative processes that are not possible in traditional environments.
- companies can make sound decisions based on data quicker than before, to outpace their competition

# **Challenges**

Self-service BI places additional strain on companies' BI organizations and BI governance as the responsibility for reporting becomes increasingly scattered. This can result in various differently prepared data sets, data inconsistencies, and mistakes in analysis, falling data quality or the development of data silos.

The risks that arise are:

- Resources aren't used efficiently enough
- Compliance and legal requirements aren't fulfilled
- The quality and efficiency of the entire corporate management is affected
- The ability to innovate and compete with the help of analytics can be compromised

#### **CLOUD BI**

Cloud Business Intelligence (BI) applications are hosted on a virtual network, such as the internet. They are used to provide organizations access to BI-related data such as dashboards, KPIs and other business analytics. Enterprises are increasingly turning to cloud-based tools, like Customer Relationship Management (CRM) applications (Salesforce), online file collaboration and storage (Dropbox, Box) and help desk software (UserVoice, Zendesk). This trend includes business intelligence tools embracing the agility and accessibility of the Cloud.



Cloud computing and business intelligence are an ideal match. Business intelligence is about delivering the right information to the right people

at the right time, and cloud computing provides a lightweight, agile way to access BI applications. The beauty of Cloud BI applications is that they are accessible on multiple devices and web browsers. This is circumventing traditional software barriers such as the requirement to access the application on-site.

#### **Benefits**

Cloud BI offers some significant advantages over on-premise applications. Here are a few of these advantages

- Ease of use
- Deployment speed
- Scalability and elasticity
- Accessibility
- Advanced Mobility
- Higher adoption rates
- Scalability and Reliability
- Data Security
- Easy Data Interpretation

# **Challenges**

A net-new BI solution or migration of an existing on-premises BI solution into the cloud creates a different set of challenges to be addressed.

- Loading data into the Cloud
- Connectivity
- Data Governance
- Operations and Maintenance
- Costs

#### **MOBILE BI**

The definition of mobile BI refers to the access and use of information via mobile devices. With the increasing use of mobile devices for business – not only in management positions – mobile BI is able to bring business intelligence and analytics closer to the user when done properly. Whether during a train journey, in the airport departure lounge or during a meeting break, information can be consumed almost anywhere and anytime with mobile BI.

#### **Benefits**

Some of the top benefits of mobile BI to workforce and business are

- Reduced time to information
- Reduced time to decision
- Improved decision making
- Improved performance
- Increased revenue
- Competitive advantage: flexibility and adaptability
- More knowledge sharing

# **Challenges**

Despite all the good things that mobile BI solutions bring, organizations are also exposed to a number of challenges when trying to achieve a successful platform adoption:

- Regardless of the delivery option, customers must consider usability.
- When implementing a mobile BI solution, security and privacy may pose problems. Companies have to make sure they implement a strong security configuration in order to protect sensitive business and user data.
  Furthermore, the mobile strategy should be aligned with existing security procedures.
- Mobile devices can easily be hacked, lost or stolen. Using mobile BI may consequently put sensitive or confidential information at greater risk of being breached.
- Due to the limited screen size of mobile devices, the design of mobile BI applications presents new challenges to developers. Each device and browser works differently.

#### HYBRID BUSINESS INTELLIGENCE

A hybrid BI solution will, in best practice, take the best bits from both a centralized and a distributed approach to BI. Each one of these methods has their own pros and cons so a hybrid of the two could be the answer many organizations are looking for.

# **Centralized Approach**

A centralized BI solution sees all the technology and power of reporting held in one position in a company. Usually either an IT team or senior management. Centralized BI solutions are fantastic for maintaining a high



level of control over data and how it is used throughout an organization. Many organizations struggle with BI implementations as each department uses different data to run different reports and so may end up conflicting with each other – a centralized view is the perfect way of avoiding this. Having one clear picture that everyone is working to.

The drawback of this approach is that if all the power is held in one place every request for a report or dashboard has to go through that department or team. For large organizations this bottleneck can be crippling, never mind time consuming!

# **Distributed Approach**

A distributed approach to BI focuses more on self-service and giving each department access to data and the ability to create their own reports. This is a great way to get data in the hands of the people who need it, as soon as possible, so they can make data-driven decisions.

The drawback, and this may ring true, is that too much self-service can lead to 'data chaos's'. If access is given to too many departments or teams it develop risk of creating conflicting reports - confusing the picture, rather than aiding decision-making.

#### **WHY BI**

A few ways that business intelligence can help companies make smarter, data-driven decisions:

- Identify ways to increase profit
- Analyze customer behavior
- Compare data with competitors
- Track performance
- Optimize operations
- Predict success
- Spot market trends
- Discover issues or problems
- Helps on data visualization that enhances the data quality and thereby the quality of decision making.



# **HOW IS BUSINESS INTELLIGENCE USED?**

Business intelligence has as positive an impact on an organization's people as it does on performance, projects, and decisions. Business Intelligence is used to turn data into actionable information for leadership, management, organization and decision making. The following are some of the ways organizations are learning to use business intelligence:

- Analyzing customer behaviors, buying patterns and sales trends
- Measuring, tracking and predicting sales and financial performance
- Budgeting and financial planning and forecasting
- Tracking the performance of marketing campaigns
- Optimizing processes and operational performance
- Improving delivery and supply chain effectiveness
- Web and e-commerce data analytics
- Customer relationship management
- Risk analysis
- Strategic value driver analysis

# ORGANIZATIONAL BENEFITS OF IMPLEMENTING BUSINESS INTELLIGENCE

- Quick answers to critical business questions.
- Align activities with strategy.
- Reduce time spent on data entry and manipulation.
- Gain in depth real time insights into customers.
- Benchmark data against competitor and historical data for continuous improvements.
- Identify and analyze areas to cut costs and for budget allocation
- Boost internal productivity by spending time on what's important.





#### **TRENDS IN BI**

The following are some business intelligence trends

# **Artificial Intelligence**

Al and machine learning take on complex tasks done by human intelligence. This capability is being leveraged to come up with real-time data analysis and dashboard reporting.

#### Collaborative BI

BI software combined with collaboration tools, including social media, and other latest technologies enhance the working and sharing by teams for collaborative decision making.



#### **Embedded BI**

Embedded BI allows the integration of BI software or some of its features into another business application for enhancing and extending its reporting functionality.

# **Cloud Analytics**

Bl applications will be soon offered in the cloud, and more businesses will be shifting to this technology. As per their predictions within a couple of years, the spending on cloud-based analytics will grow 4.5 times faster.

#### **IoT**

The internet of things (IoT) refers to interrelated physical devices that speak to each other and transfer data without human interaction. Almost anything can be turned into an IoT device with a sensor to collect and transfer data over networks. The decrease in the cost of sensors and technological advancements in ever-smaller devices have led to the explosion of such devices and the amount of data gathered.

#### **FUTURE OF BI**

Business intelligence is continually evolving according to business needs and technology, so each year, new trends are identified to keep users up-to-date on innovations. Realize that artificial intelligence and machine learning will continue to grow, and businesses can integrate the insights from Al into a broader Bl strategy. As companies strive to be more data-driven, efforts to share data, and collaborate will increase. Data visualization will be even more essential to work together across teams and departments.

#### **COGNITIVE CONVERGENCE RESOURCES**

To have a quick view on our provided resources please refer below-mentioned links of YouTube videos and PDF presentations.

#### **VIDEOS OF OUR RESOURCES**

# **Cloud Consulting**

https://www.youtube.com/watch?v=y1yuMYKC8Sk

# Power platform - Consulting service

https://www.youtube.com/watch?v=JOVb87jUVjE

# **Power BI Consulting Practice**

https://www.youtube.com/watch?v=tctLWBgepk4

#### Power BI Custom Visual Development using D3.js

https://www.youtube.com/watch?v=UuMVe QpYQQ

#### PRESENTATION OF OUR RESOURCES

# **Cloud Consulting**

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# Power platform - Consulting service

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#### **Power BI Consulting Practice**

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# Power BI Custom Visual Development using D3.js

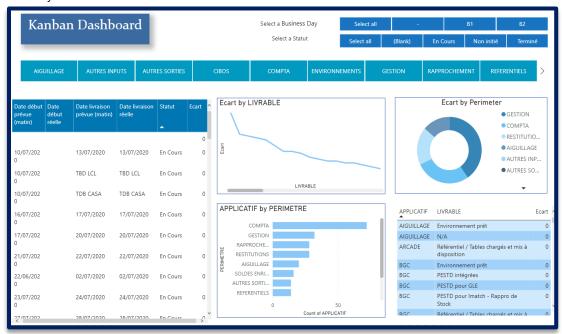
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#### **CLIENT DIARIES**

Cognitive Convergence has done a number of projects which include

# KANBAN DASHBOARD

- We created an automatic Kanban dashboard in Power BI desktop in order to ease to see the status of the task and for viewing.
- We were provided with Italian data and we created interactive visual after transformation and cleaning of data.
- Our report contains a number of visuals which displays delay in delivering order, relationship between delay and many more



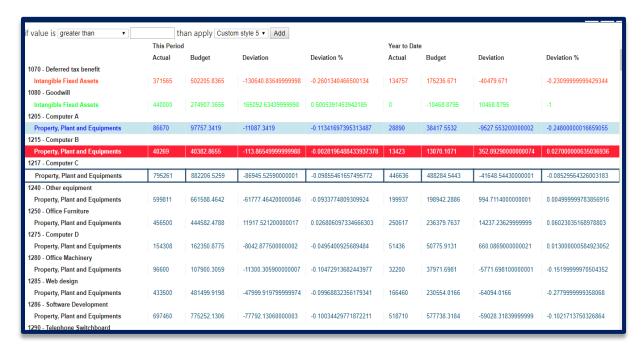
# **BIMCOLLAB DASHBOARD**

- We implemented BIMcollab in Power BI. We were provided with BIMcollab issues data of a project and we created interactive report using this data.
- Our report contains a number of visuals including Issues Status, Issues by Priority, Issues by Status, Issues by Type, Issues by Job and Priority, Issues by Company, Issues by Milestones and many more.



# FINANCIAL MATRIX CUSTOM VISUAL

- We developed custom visual for financial reporting with help of some SDK and typescripts in Power BI.
- It provides a number of including line formatting, conditional formatting, subtotals, and more.
- Fully integrated with the Power BI developer experience, the visual is configured via the standard fields and formatting pane.



#### **D365 Business Central**

• We developed a Report for managing Dynamic 365 Business Central data after its integration with Power BI.

• It provides a number chats of including Profit by Unit Price, List of Items, Sales and profit by Items and account by description.



#### D365 Data Dashboard

We develop a report of managing Dynamic 365 data that manage Profit, Liabilities Asset - Liabilities and Assets.



# **CONCLUSION**

In this paper competency solution of BI practice is discussed. Different tools of BI are explored and their comparison and market competency is done. Different dimensions of BI solutions such as self-service BI, cloud BI and Distributed model for BI are discussed. Power BI development services provided by cognitive Convergence followed by few of the client dairies of cognitive convergence are also discussed here.

# **CONTACT US**

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