

Preferred Strategies, Inc. d/b/a QuickLaunch Analytics

QuickLaunch Analytics Components & Assumptions

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QuickLaunch Analytics Components & Assumptions

This Agreement is made by and between the Customer and Preferred Strategies, Inc. d/b/a QuickLaunch Analytics (“QLA”) and is made pursuant to and under the terms and conditions of the QuickLaunch Analytics Subscription Agreement and Order Form.

QuickLaunch Analytics Installation Components

QLA will install the QuickLaunch Analytics components for QuickLaunch Analytics Lakehouse, the QuickLaunch Analytics Data Model and QuickLaunch Analytics Front-end content. The QuickLaunch Analytics Installation covers one ERP production environment as a source and one Azure Resource Group target. Installation and configuration of other ERP production environments or multiple Azure Resource Groups can be addressed as Consulting Services. This document describes the QuickLaunch Analytics components that will be installed and configured as part of the QuickLaunch Analytics Installation.

QLA will provide a Recommended Resource Specification document outlining the Azure or on-premise resources required for the QuickLaunch Analytics solution based on the ERP source. This document is tailored to the Customer’s requirements and will be provided after Customer completes the Technical Review.

QuickLaunch Analytics Lakehouse

The following items will be installed as part of your QuickLaunch Analytics Subscription.

QuickLaunch Analytics Lakehouse

The QuickLaunch Analytics Lakehouse implementation approach is where transaction data is copied from the source ERP database into a target Azure Delta Lake environment (Lakehouse) dedicated for reporting and analytics. The data is mirrored from the ERP in its raw form and stored in the Bronze Tier of the Lakehouse. The data is then transformed into an analytics-ready format through a layer of views applied in Databricks SQL as the query engine where it is staged in the Silver Tier of the Lakehouse. The Lakehouse includes an initial full load into the Lakehouse and then incremental changes are applied.

QuickLaunch Analytics Lakehouse Data Replication Options

The data replication software used for QuickLaunch Analytics Lakehouse is dependent on whether Full Loads or Incremental Loads are procured as well as the ERP database type.

1. QuickLaunch Analytics Lakehouse (Full Loads)

If QuickLaunch Analytics Lakehouse (Full Loads) are procured, QLA will provide QuickLaunch Analytics Databricks workflows to integrate ERP data (on SQL Server, Oracle, or DB2 databases) into the Lakehouse in Full Loads. QLA will install a custom application on the client workstation to read metadata from the source ERP database.

2. QuickLaunch Analytics Lakehouse (Incremental Loads)

- If QuickLaunch Analytics Lakehouse (SQL Server Incremental Loads) are procured, QLA will provide QuickLaunch Analytics Databricks workflows to integrate ERP data on SQL Server into the Lakehouse with Incremental Loads. QLA will install a custom application on the client workstation to read metadata from the source ERP database (SQL Server Incremental Loads).
- For Data Replication from ERP database types on Oracle or DB2 into the Lakehouse, third party technology can be procured separately (Oracle or DB2 Incremental Loads).

QuickLaunch Analytics Installation

1. Azure Configuration

Customer is responsible for setting up an Azure subscription and procuring required PowerBI Licenses. As part of the Technical Installation, QLA will assist Customer in configuring a single Azure Resource Group for purposes of the QuickLaunch Analytics project. Configuration will occur through working sessions, including:

- Coordinate with Customer network group on virtual network/address space to use in Azure

- Create virtual network and subnets, as well as NAT gateway, if required
- Create single Azure Resource Group including the following Azure resources:
 - One App Registration
 - One Databricks Workspace
 - Two Key Vaults
 - One Storage Account
 - One Access Connector
- Configure and populate Lakehouse solution
- Provision Azure VM's (if applicable)

Exclusions can be addressed on a Consulting hours basis, if needed:

- Advanced Azure Networking using private endpoints
- Site to Site VPN or Azure ExpressRoute
- Additional Azure subscriptions, resource groups or Azure resources as outlined above
- Additional networking and resource planning for non-QuickLaunch Analytics use cases

2. QuickLaunch Analytics Views

QLA will configure and install QuickLaunch Analytics database views with Databricks SQL over the ERP tables in the Lakehouse. The QuickLaunch Analytics views translate and transform the ERP data into analytics ready format for injection into the QuickLaunch Analytics Data Model.

3. QuickLaunch Analytics Data Model

QLA will configure the QuickLaunch Analytics Data Model for all ERP modules purchased, except Human Resources/Payroll. If purchasing Human Resources/Payroll module, a 2nd Data Model is configured to isolate it.

4. QuickLaunch Analytics Power BI Reports

QLA will install and configure sample Power BI reports tailored for each ERP module purchased by Customer.

5. QuickLaunch Analytics Account Hierarchy

QLA will configure the account hierarchy to support the row grouping for the Income Statement and Balance Sheet based on mapping provided by the Customer Finance subject matter expert.

6. User Defined Codes

QLA will include User Defined Codes/Fields for ERP master tables included.

7. QuickLaunch Analytics Module Security

QLA will configure Module Security in the Data Model to allow users to see data for their related subject areas such as General Ledger, Accounts Payable, Accounts Receivable, etc.

8. Development Environment

QLA will configure a BI Development environment at the completion of the Production environment being fully configured and validation signoff by the Customer. The development BI environment can be sourced from the ERP production environment, or a non-production environment based on Customer preference.

9. Source Control

Source control is used to track version control on Data Model solution, Paginated Reports solution, and Databricks Notebooks.

Databricks ETL solutions require an Azure DevOps GIT repository so QLA recommends using Azure DevOps for all source control objects for the QuickLaunch Analytics solution when using Databricks ETL. QLA team members can help Customer set up accounts and create a QLA user to be used by QLA during the installation. If Customer already has a Source Control platform to be used for this project, QLA will work with the Customer team to leverage it, where possible.

Additional QuickLaunch Analytics and Related Items to be Configured (if preferred)

1. QuickLaunch Analytics Paginated Financial Reports / KPI's

QLA will install and configure the QuickLaunch Analytics Income Statement and Balance Sheet over the Customer Data Model as Paginated Reports. QLA will map the report row hierarchies to match Customer financial row grouping criteria.

QLA will install and configure the out-of-box Financial Ratios and KPI's and supporting PowerBI reports. QLA will also include all available measures within the subscribed modules procured.

The installation includes a standard configuration (up to 20 hours of effort) to configure the KPIs and Paginated Reports for an Income Statement and Balance

Sheet is included in this Agreement. Twenty hours of effort should suffice for the installation. Additional time required by QLA beyond 20 hours to create Paginated Reports will be addressed as Consulting Services.

2. QuickLaunch Analytics Row Security

QLA will configure Row Security in the Data Model based on agreed upon solution defined in the security requirements meeting with the Customer during the implementation. Dynamic Row Security by user requires a mapping to the user email address or AD login. Row Security may be configured based on existing ERP row security. Object level security can be addressed as Consulting Services.

The installation includes the standard configuration (up to 16 hours of effort) to configure Module and Row Security is included in this Agreement. Sixteen hours of effort should suffice for the installation. Additional time required by QLA beyond 16 hours to configure Row Security will be addressed as Consulting Services.

3. Currency Conversion (JD Edwards only)

QLA will configure Currency Conversion in the views and the Data Model if available in QuickLaunch Analytics for Customer ERP. Currency Conversion uses ERP Restatement ledgers to report in consolidated currency in the General Ledger module. All other modules include dynamic conversions from local base currency to up to 3 other currencies using the ERP currency rate tables.

4. UOM Conversion (JD Edwards only)

QLA will configure Unit of Measure in the views and the Data Model if available in QuickLaunch Analytics for Customer ERP. UOM Conversion includes dynamic conversions from transaction UOM to Primary UOM plus up to 4 other UOMs using the ERP UOM conversion tables.

5. Supply and Demand (JD Edwards only)

QLA will install the base Supply and Demand views, data model objects, and report as part of the implementation. Additional consulting hours are required to complete the configuration of the Supply and Demand perspective to meet customer specifications. The additional effort includes meeting to review the sample report and discuss filter criteria for each view, apply the view changes, modify the report to configure accurate drill through pages and customer

validation support. The approximate effort is 12 to 24 hours depending on the complexity.

6. Technical Assumptions and Exclusions

- This agreement covers licensing for QLA QuickLaunch Analytics Solution. Customer is responsible for purchasing licensing including, but not limited to, Power BI, Tabular Editor 3, and Azure subscriptions such as Azure Storage, Databricks, Databricks SQL, Azure DevOps, Site to Site VPN or Azure ExpressRoute, Client Tool Workstation VM and Third-Party Replication VM if applicable.
- Customer planning to use the PowerBI.com service must have Azure AD/Office 365 implemented and the users will have a valid login to the same PowerBI Azure Tenant. If on premises, the Active Directory users and groups must be synced to Azure AD.
- The installation includes the first 4 hours of effort to access the Customer environment including connecting to the Customer environment, accessing the BI resources with the appropriate privileges, and completing any Customer corporate compliance documentation/training, is included in this Agreement. Four hours of effort should suffice for the installation. Additional time required by QLA beyond 4 hours to access the Customer environment will be addressed as Consulting Services.
- The QuickLaunch Analytics solution will be initially installed and configured for a single Azure or Active Directory domain. QuickLaunch Analytics can then be set up for additional domains but additional configuration and troubleshooting to resolve issues that arise from multiple domains will be addressed with Consulting Services rather than the fixed installation fee. This includes software installation and configuration, Power BI site configuration, and security associated with the data model.
- Any customizations will be addressed, and an estimate and timeline provided, after the QuickLaunch Analytics Installation is complete.

QuickLaunch Analytics Installation Project

QLA will install and configure QuickLaunch Analytics as part of the QuickLaunch Analytics Installation Project. This Agreement describes the QuickLaunch Analytics Installation Project.

QuickLaunch Analytics Installation Project Approach

QLA uses a waterfall approach to install and configure QuickLaunch Analytics.

- Prior to Project Kickoff, a Technical Review call will be conducted to validate technical requirements and provide a Recommended Resource Specification document.
- A Technical Project Kickoff call formally starts the configuration of the technical resources.
- A QuickLaunch Analytics Project Kickoff call formally starts the configuration and validation of the QuickLaunch Analytics solution. The Project Kickoff call includes project team introduction, scope review and a Project Plan walkthrough to align tasks, ownership, and dates. The Project Kickoff call is only scheduled once QLA has validated remote access and the provisioned resources meet the Recommended Resource Specification document.
- Weekly Status Meetings will be conducted by QLA with Customer to track progress, document decisions and address issues for the implementation project's intended duration.
- User validation of the out of box QuickLaunch Analytics installation will be kicked off by a series of QuickLaunch Analytics Solution Review knowledge transfer sessions with the Customer validation team to introduce them to the Data Model via Excel and Power BI. Additionally, a Data Model Administration knowledge transfer session will be conducted with Customer technical team. QLA will ask for Signoff after 1-2 weeks of validation.
- The QuickLaunch Analytics Project is complete when the QuickLaunch Analytics Installation and configuration has been completed. In the event the Customer needs to delay the project for any reason, QLA will work with the Customer within a reasonable amount of time (1-3 weeks). If the project delay is longer (more than 3 weeks), QLA will put the project on hold, weekly status

calls will be canceled, and QLA will restart the project once QLA and Customer project staff are both available.

- The Technical and QuickLaunch Analytics project duration timeline is achievable in 13 weeks or less. If a project runs longer than 14 weeks and we reach 10% over project budgeted hours, all remaining efforts will be billable. Project Manager will communicate early on if the project is behind schedule and tracking over budget and will present options to prevent this scenario.

QuickLaunch Community

QLA will provide Customer access to the QuickLaunch Community for the number of users purchased as part of their QuickLaunch Analytics Subscription. The QuickLaunch Community is an online resource where users can find answers to questions to resolve issues quickly. The QuickLaunch Community contains hundreds of articles and videos on topics related to using QuickLaunch Analytics and Power BI, Paginated Reports, and Excel. It includes how-to guides, tips and tricks, education sessions, and content to help all levels of users. The Community is designed to support all customers in their journey, with sections dedicated to the implementation, specific product content, and customer success. It is recommended that the Customer team members assigned to the QuickLaunch Analytics Installation Project join the community and review the recommended implementation content prior to taking the QuickLaunch Analytics Solution Review sessions.

Subscription Benefits and Service Availability

QuickLaunch Analytics Subscription Benefits

The following details are benefits included as part the QuickLaunch Analytics annual Subscription:

- Fixes to Known Issues identified in current QuickLaunch Analytics content
- Updates to QuickLaunch Analytics content to support current releases of ERP
- Updates to QuickLaunch Analytics content to support current releases of Microsoft Reporting and BI Software
- Enhancements and additions made to existing QuickLaunch Analytics content
- Adoption Credits for Training and Coaching included with Subscription
- Discounted Consulting Rates

- Access to QuickLaunch Community
- Dedicated Customer Success Manager

When identified, Known Issues will be resolved as quickly as possible and implemented with the Customer free of charge. The Customer will be informed when QuickLaunch Analytics updates, enhancements, and additions are available, and upon request, QLA will deliver updates to the Customer. QuickLaunch Analytics updates can be installed and configured internally by the Customer or performed by QLA on a Consulting basis using Subscription hours delivered as part of QuickLaunch Analytics Subscription or other purchased Consulting Services from QLA.

QLA will install QuickLaunch Analytics and validate that the data retrieved by QuickLaunch Analytics matches the ERP. However, it is the responsibility of Customer to reconcile all reports delivered with QuickLaunch Analytics or custom developed at Customer sourced from QuickLaunch Analytics before they are distributed for production use.

Service Availability

Customer team members will have the direct contact information for QLA team members assigned to the installation project and Customer can contact any QLA team member directly for assistance and collaboration on the project. QLA delivers Telephone and Email support within the following hours.

- Telephone support: 8:00 A.M. to 5:00 P.M. Pacific Time Monday – Friday
 - Calls received out of office hours will be forwarded to a mobile phone and all reasonable efforts will be made to answer / action the call.
- QuickLaunch Ticketing System: Monitored 8:00 A.M. to 5:00 P.M. Pacific Time Monday – Friday
 - Tickets received outside of office hours will be collected, however, no action can be guaranteed until the next working day.
 - Submit tickets via the QuickLaunch Community site.

<https://quicklaunchanalytics.com/quicklaunch-community/>