

QuickLaunch Analytics Application Pack Components & Assumptions



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QuickLaunch Analytics Application Pack Introduction

The Agreement is made by and between 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. The QuickLaunch Application Pack extends the functionality of the QuickLaunch Foundation Pack by providing customers with data transformation views, comprehensive Power BI Semantic models, and pre-built reports and dashboard to realize quicker time to value and increase user confidence and satisfaction.

QuickLaunch Analytics Application Pack Installation Components

QuickLaunch Analytics will install the Application Pack components in Customer's Lakehouse and Power BI tenants. Installation will be performed on a fixed fee basis.

The QuickLaunch Analytics Application Pack is based on the Foundation Pack, as such, this document includes additional definitions on top of the Foundation Pack Components and Assumptions document.

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 Application Pack Installation, above what is outlined in the Foundation Pack Components and Assumptions.

QuickLaunch Analytics Deliverables

The following items will be installed as part of your Application Pack subscription.

QuickLaunch Analytics Lakehouse

QLA will configure and install QuickLaunch Analytics Lakehouse specific to the Customer ERP on Customer's tenant. QLA will install the desktop applications to support the installation and on-going integration of the Application Pack-specific Lakehouse solution.

QuickLaunch Analytics Views

QLA will configure and install QuickLaunch Analytics database views with Databricks SQL over the Application specific tables in the Lakehouse. The QuickLaunch Analytics views translate and



transform the Application specific data into analytics ready format for injection into the QuickLaunch Analytics Data Model.

QuickLaunch Analytics Data Model

QLA will configure the QuickLaunch Analytics Data Model for all Application modules purchased. If procuring an ERP Application Pack where Human Resources/Payroll is a QLA supported module, the Human Resources/Payroll module will be deployed as a second Data Model to isolate it.

QuickLaunch Analytics Power BI Reports

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

User Defined Codes

If Application has User Defined Codes, QLA will include User Defined Codes/Fields for Application dimension tables included in the solution.

QuickLaunch Analytics Account Hierarchy

If a Financial Account Hierarchy is applicable with the Application, 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.

Power BI Report Builder for Income Statement and Balance Sheet

If applicable to the Application Pack, 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 Power BI reports. QLA will also include all available measures within the subscribed modules procured.

The fixed-fee 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. Twenty hours of effort should suffice for the installation. Any additional time beyond the 20 hours required by QLA to create Paginated Reports will be addressed as Consulting Services.

QuickLaunch Analytics Module and Row Security

If applicable to the Application Pack, 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.



QLA will configure Row Security in the Data Model based on agreed upon solution defined in the security requirements meeting with Customer during 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 Application row security. Object level security can be addressed as Consulting Services.

The fixed-fee installation includes the standard configuration (up to 16 hours of effort) to configure Module and Row Security. Sixteen hours of effort should suffice for the installation. Any additional time beyond the 16 hours required by QLA to configure Row Security will be addressed as Consulting Services.

Production and Development Environment

QLA will configure a development Lakehouse and Power BI environment once the Production environment is fully configured and QLA has received validation signoff from Customer. QuickLaunch Analytics recommends sourcing the Lakehouse production and development data from the same Application production environment to minimize ETL costs, opportunities for failures, and simplicity. However, the development environment can be sourced from a non-production environment based on Customer preference.

Technical Assumptions and Exclusions

- The fixed-fee 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. 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 fixed-fee installation includes the configuration of the target Lakehouse environment for a single Workspace with semi-private networking in Azure. The need for multiple Workspaces and/or fully private networking in Azure 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 as 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.
- QLA will install the QuickLaunch Analytics Application Pack components and perform basic validation. It is the responsibility of Customer to reconcile all reports delivered with QuickLaunch Analytics and custom reports developed and sourced by QuickLaunch Analytics before they are distributed for production use.



- Any customizations will be addressed with 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.
- An Implementation Project Kickoff call formally initiates 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 Customer needs to delay the project for any reason, QLA will work with 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.

Subscription Benefits

QuickLaunch Analytics Application Pack Subscription Benefits

The following details are benefits included as part of the QuickLaunch Analytics Application Pack Subscription:

- Dedicated Customer Success Manager
- Fixes to Known Issues identified in current QuickLaunch Analytics Application Pack content
- Enhancements and additions made to existing QuickLaunch Analytics Application Pack content
- Updates to QuickLaunch Analytics content to support current releases of Lakehouse, Microsoft Power BI, and other applications to support the solution
- Adoption Credits for Training and Coaching
- Discounted Consulting Rates
- Access to QuickLaunch Community

When identified, Known Issues will be resolved as quickly as possible and implanted with Customer free of charge. Customer will be informed when updates, enhancements, and additions are available, and upon request, QLA will deliver updates to the customer.

QuickLaunch Analytics Application Pack updates can be installed and configured internally by Customer or performed by QLA using Consulting Services included as part of the subscription or other purchased Consulting Services from QLA.

QLA will install the QuickLaunch Analytics Application Pack and validate that the data retrieved by QuickLaunch Analytics matches the source application. It is the responsibility of Customer to reconcile all reports delivered with QuickLaunch Analytics and custom reports developed and sourced by QuickLaunch Analytics before they are distributed for production use.

