QuickLaunch Analytics Foundation Pack
Components & Assumptions

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QuickLaunch Analytics Foundation 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 Analytics Foundation Pack is a suite of tools which provide data replication (**data pipeline**), data transformation (**Databricks Lakehouse management**), and **analytics modelling** (Power BI semantics models) so that companies have a governed, scalable, and secure *automated enterprise data platform* which can drive their data driven transformation using a Data Lakehouse architecture.

QuickLaunch Analytics Foundation Pack Installation Components

If desired, QuickLaunch Analytics will install the Foundation Pack components in Customer's Lakehouse and Power BI tenants. For Customers that have procured only the Foundation Pack, installation will be performed with Consulting Services. However, QLA will not configure Foundation Pack components to applications that are covered with a QuickLaunch Analytics Application Pack without Customer procuring the applicable Application Pack Subscription. If also licensing an Application Pack, see Application Pack Components and Assumptions for additional details.

QuickLaunch Analytics will provide a Recommended Resource Specification document and Lakehouse Estimated Cost calculator based on the data sources and approach defined by Customer. This calculator will also include recommended Power BI Fabric or Premium Capacity licenses. These documents are tailored to Customer's requirements and will be provided after Customer completes the Technical Review. QuickLaunch Analytics makes no guarantee as to the actual Lakehouse costs incurred as this varies based on Customer usage.

The QuickLaunch Analytics Power BI Semantic Models require deployment to Workspaces using Fabric or Premium Capacity. The lowest entry level is Premium Per User, where every user interacting with the semantic model requires a Power BI Premium Per User license. The next level is Fabric Capacity that has a distinct pool of resources, and the size of the capacity determines the amount of computation power available. The minimum Fabric Capacity SKU to support Power BI workloads is F64, however Customers with larger data volumes will require a larger Fabric Capacity to support their semantic model size requirements.

Customer is responsible for purchasing licensing including, but not limited to, Third-Party Data Replication Software, 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.

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QuickLaunch Analytics Lakehouse

The QuickLaunch Analytics Lakehouse implementation approach is where transaction data is copied from the source database(s) into a target Azure Delta Lake environment (Lakehouse) dedicated for reporting and analytics. The data is mirrored from the source 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 the Lakehouse query engine where it is staged in the Silver Tier.

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

Lakehouse Configuration

The QuickLaunch Analytics Lakehouse will be configured and installed on Customer's tenant. During the technical installation, QLA will assist Customer in configuring the target Lakehouse environment through working sessions including:

- Coordinate with Customer network group on virtual network/address space to use in Azure
- Configure Azure networking using semi-private or private endpoints
- Assist with Site-to-Site VPN or Azure ExpressRoute, where needed
- Create Azure Resource Group(s) including the following
  - Storage Account
  - Databricks Workspace
  - Key Vaults
  - Access Connector
  - App Registrations
  - SQL Serverless Endpoints
- Create and secure catalogs and schemas
- Install QuickLaunch Analytics Databricks Wheel Files used to support ETL process and help manage Customer's Databricks environment
- Provision Azure VMs, if applicable

Setup Workflow jobs to support Lakehouse audit, maintenance, Power BI Semantic Model refreshes, and other functions.

QuickLaunch Analytics Data Pipeline

The QuickLaunch Analytics Data Pipeline solution provides end-to-end replication for SQL databases (on-premises or hosted) to Customer Lakehouse. Included with the solution are additional Lakehouse management notebooks to support capabilities such as importing tables from SharePoint or flat files, cloning catalogs, connectivity tests, and expiring secrets.

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Sample Catalog

The QuickLaunch Analytics Lakehouse includes the installation of a sample catalog with schemas, tables, views, and data used to showcase the code and methodology of the Foundation Pack. This can be a reference for Lakehouse Developers and Data Model Developers to build their solutions.

QuickLaunch Analytics Lakehouse Applications

The QuickLaunch Analytics Foundation Pack includes desktop applications to support the installation and on-going integration of the Lakehouse solutions. These applications will be installed on the Client Workstation provisioned by Customer for the QLA consultants to utilize. Customers' Lakehouse Administrators and Developers will need these applications as well.

QuickLaunch Analytics Delta Editor

The QuickLaunch Analytics Delta Editor is a tool for Lakehouse Administrators, automating a variety of common tasks that enhance efficiency and streamline operations. By reading tables from a source database, it can generate the necessary ETL metadata and create the corresponding tables in the Lakehouse, significantly reducing manual effort. This tool can also query both the source database and the target Lakehouse via a JDBC connection which further enhances its utility. The Delta Editor includes functionality to build and populate the QuickLaunch Calendar.

QuickLaunch Analytics Schema Compare

The QuickLaunch Analytics Schema Compare application is a valuable tool for managing differences between Lakehouses, particularly when promoting changes from development (Dev) to production (Prod) environments. By comparing tables and views, the application highlights specific code differences in the schemas, providing clarity and facilitating troubleshooting and functionality not otherwise available in the Lakehouse.

QuickLaunch Analytics Power BI Source Fixer

The QuickLaunch Analytics Power BI Source Fixer application automates the process of bulk mapping Power BI Desktop files to new semantic models. It also includes the ability to replace the default logo in the report samples to enhance customization and branding across reports.

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QuickLaunch Analytics Deliverables

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

Power BI Environment

The QLA team and Customer will collaborate to configure the necessary settings within Customers' Power BI Tenant including:

- Power BI Tenant settings to support using XMLA Endpoint
- Power BI Workspaces to publish semantic models and reports
- Azure VNet Data Gateways, On-Premises Data Gateways, or Fabric Capacity to support private endpoint networking, if applicable

Power BI Metric Stores

Metrics stores are prebuilt semantic data models that provide modelling examples for specific business cases such as General Ledger, Sales, Job Cost, Accounts Payable, Payroll, and Supply Chain. These models provide time to value opportunities for your specific source application and provide modelling examples that can be applied to other unique data needs. Included with the metric store semantic models:

- Calendar – supports both Fiscal and Standard calendars, along with multiple fiscal calendars
- Time Intelligence – calculation groups to provide reusable custom calculations that can accommodate various fiscal calendars and patterns.
- Semantic Model Security – strategies for both module and row level security
- Semantic Model Partitions – strategies for dividing data into discrete subsets to allow for more efficient data processing
- Tabular Editor 3 Scripts – automates repetitive data modelling tasks to accelerate model development and maintenance, following the QuickLaunch Analytics Methodology

QuickLaunch Analytics Methodology

Along with the items included with the Power BI Metric Stores, the Foundation Pack includes best practices and samples to enhance accuracy and performance for the following complex modelling techniques:

- Currency Conversion
- Unit of Measure Conversion
- Organization Hierarchy
- Financial Hierarchy
- Expanded Bill of Materials

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Power BI Report Examples and Templates

QLA provides example Power BI reports that reveal how to use more advanced visualizations such as scatter plots and decision trees. Customers can apply logos and json themes using the QuickLaunch Analytics Power BI Source Fixer application, to enhance customization and branding across reports.

Power BI Report Builder for Income Statement and Balance Sheet

QLA provides templates for Income Statement and Balance Sheet paginated reports that include techniques for providing the capability to drill down to the detail transactions.

Production and Development Environment

QLA will configure production and development Lakehouse and Power BI environments. For the initial installation, QLA will configure one environment that will be designed and validated by Customer. Upon an agreed upon milestone, QLA will configure the second environment using cloning techniques to quickly stand up the second environment. After the second environment is complete, Customer will follow standard software deployment techniques to update and validate changes in development and then promote those changes to production.

Source Control

Source control is used to track version control on Power BI Semantic Models, Power BI Report Building Paginated Reports, 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.

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 users of all levels. The Community is designed to support all customers in their journey, with sections dedicated to the implementation, specific product content, and customer success.

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Subscription Benefits and Service Availability

QuickLaunch Analytics Foundation Pack Subscription Benefits

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

- Access to enhancements and additions to QuickLaunch Analytics Foundation Pack content
- Updates to QuickLaunch Analytics content to support current releases of Lakehouse, Microsoft Power BI and other applications to support the solution
- Fixes to Known Issues identified in current QuickLaunch Analytics content
- Discounted Consulting Rates
- Access to QuickLaunch Community

QLA will install QuickLaunch Analytics Foundation 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.

Service Availability

Customer team members will have direct access to QLA team members assigned to the initial installation project and Customer can contact those members directly for assistance and collaboration on the project.

After the initial installation project, Customer will use the QuickLaunch Ticketing system for support and development requests.

- Tickets are submitted via the QuickLaunch Community site.
- Tickets are monitored from 6:00 AM to 5:00 PM Pacific Time, Monday – Friday. Tickets received after hours will be collected, but action cannot be guaranteed until the next business day.

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