

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 Data 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 as part of the subscription.

If Customer is also licensing an Application Pack, see Application Pack Components and Assumptions for additional details. 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.

QuickLaunch Analytics will provide a Recommended Resource Specification document for Foundation Pack which includes a high-level Azure resource diagram, direction for required users and groups to configure the Foundation Pack, and lakehouse estimated cost ranges to help Customer understand lakehouse resource costs. QuickLaunch Analytics makes no guarantee as to the actual lakehouse costs incurred as this varies based on Customer usage.

The QuickLaunch Analytics Power BI Data Models require deployment to workspaces using Fabric or Premium Capacity. The lowest entry level is Premium Per User, where every user interacting with the data model requires a Power BI Premium Per User license. The next level is Fabric Capacity, which has a distinct pool of resources, and where the size of the capacity determines the amount of computation power available. The minimum Fabric Capacity SKU to support import Power BI Models is F64, however if Customer has larger data volumes a larger Fabric Capacity will be required to support their data 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, Azure DevOps, site-to-site VPN, or Azure ExpressRoute, a client tool workstation VM, and third-party replication VM, if applicable.



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.

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 endpoints
- Assist with site-to-site VPN or Azure ExpressRoute, where needed
- Create One (1) Azure Resource Group, including the following
 - Storage Account
 - Databricks Workspace
 - Key Vaults
 - Access Connector
 - App Registrations
 - SQL Serverless Endpoints
- Create and secure sample catalogs and schemas
- Install QuickLaunch Analytics Databricks wheel files used to support ETL process and help manage Customer's Databricks environment
- Provision Azure VM for client workstation, if applicable
- Configure client workstation for QLA

Additional Lakehouse Consulting Hours

If Customer requires any of the following services for the lakehouse configuration, QLA will provide an estimate as part of a consulting project plan:

- Azure networking with fully private endpoints
- Additional Azure Resource Groups
- Azure VNet Data Gateways, On-Premises Data Gateways, or Fabric Capacity to support private endpoint networking



- ETL Configuration, including movement of data from source(s) into lakehouse, installation of third-party data replication software, and required components

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.

Sample Catalogs

The QuickLaunch Analytics Lakehouse includes the installation of sample catalogs with schemas, tables, views, and applicable 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 and the basis for QuickLaunch training.

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. Customer's 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 to production 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 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 Customer's Power BI Tenant including:

- Power BI Tenant settings to support using XMLA endpoint
- Power BI Workspaces to publish data models and reports

Power BI Metric Stores

Metrics stores are prebuilt 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 data 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
- Data Model Security – strategies for both module and row level security
- Data 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



Power BI Report Examples and Templates

QLA will provide example Power BI reports that reveal how to use more advanced visualizations such as scatter plots and decision trees. Customer 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.

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 data models. It also includes the ability to replace the default logo in the report samples to enhance customization and branding across reports.

Source Control

QLA will configure Azure DevOps GIT repositories for source control, which is used to track version control on Databricks Notebooks, Power BI Data Models, Power BI Report Builder Paginated Reports.

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.

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.



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 Databricks 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

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.

