QuickLaunch Application Pack Components & Assumptions

info@quicklaunchanalytics.com
www.QuickLaunchAnalytics.com

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QuickLaunch 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 Subscription Agreement and Order Form. The QuickLaunch Application Pack extends the functionality of the QuickLaunch Foundation Pack by providing Customer with data transformation views, comprehensive Power BI Data Models, and pre-built reports and dashboards to realize quicker time to value and increase user confidence and satisfaction.

QuickLaunch Application Pack Installation Components

This document describes the QuickLaunch components that will be installed and configured as part of the QuickLaunch Application Pack installation, above what is outlined in the Foundation Pack Components and Assumptions.

Based on the type of Application Pack, the QuickLaunch installation and configuration covers one production environment as a source (i.e., ERP, CRM, FP&A, etc.) and one Azure Resource Group target. Installation and configuration of other production environments or multiple Azure Resource Groups can be addressed as Consulting Services.

QuickLaunch Deliverables

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

QuickLaunch Lakehouse

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

In addition to the standard Foundation Pack, the Application Pack installation includes the following:

- Target catalogs, schemas, tables, and views
- ETL configuration, including movement of data from production source into lakehouse
- Setup of workflow jobs to support lakehouse audit, Power BI Data Model refreshes, and other functions
- Databricks wheel file components for the Application Pack

QuickLaunch Analytics will provide a Recommended Resource Specification document and Lakehouse Estimated Cost Calculator based on the data sources specific to the Application Pack 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.

QuickLaunch Views

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

QuickLaunch Data Model

QLA will configure the QuickLaunch 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 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 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 Income Statement and Balance Sheet over Customer's 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 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 Leger, 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 solution will be initially installed and configured for a single Azure or Active Directory domain. QuickLaunch 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.

- Any customizations will be addressed with an estimate and timeline provided, after the QuickLaunch Installation is complete.

QuickLaunch Installation Project

This Agreement describes the QuickLaunch Installation Project.

QuickLaunch Installation Project Approach

QLA uses a waterfall approach to install and configure QuickLaunch.

- 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 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 installation will be kicked off by a series of QuickLaunch 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 Project is complete when the QuickLaunch 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 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 Application Pack Subscription Benefits

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

- Dedicated Customer Success Team
- Fixes to Known Issues identified in current QuickLaunch Application Pack content
- Enhancements and additions made to existing QuickLaunch Application Pack content
- Updates to QuickLaunch content to support current releases of lakehouse, Microsoft Power BI, and other applications to support the solution
- Discounted Consulting Rates
- Access to QuickLaunch Community

Customer will be informed when updates, enhancements, and additions are available, and upon request, QLA will deliver updates to Customer. When identified, Known Issues will be resolved as quickly as possible and implemented with Customer free of charge. QuickLaunch Application Pack updates can be installed and configured internally by Customer or performed by QLA using Consulting Services.

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