QuickLaunch Application Pack for OneStream Components & Assumptions

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QuickLaunch OneStream 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 OneStream Application Pack is a preconfigured, yet customizable, end to end solution facilitating analytics in Power BI over OneStream data.

QuickLaunch OneStream Application Pack Installation Components

This document describes the QuickLaunch components that will be installed and configured as part of the QuickLaunch OneStream Application Pack installation.

QuickLaunch Analytics will provide a Recommended Resource Specification document which includes a high-level Azure resource diagram, and direction for required users and groups to configure the OneStream Application Pack.

The QuickLaunch 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, OneStream Power BI Connector, Power BI, Tabular Editor 3, and Azure subscriptions, Client Tool Workstation VM, if applicable.

The QuickLaunch installation and configuration covers one production environment and one Power BI Data Model target. Installation and configuration of other production environments or multiple Power BI Data Models can be addressed as Consulting Services.

QuickLaunch OneStream Direct Connect

The QuickLaunch OneStream Direct Connect implementation approach allows for the preparation and transformation of OneStream data into an analytics-ready format. This is accomplished with the OneStream Power BI Connector, QuickLaunch developed OneStream objects configured on the source OneStream environment and an Enterprise grade Power BI Data Model deployed to Customer's Power BI tenant.

QuickLaunch Deliverables

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

QuickLaunch Solution Objects in OneStream Application
QLA will install and configure the QuickLaunch Workspace in OneStream, which includes the following:

- Encrypted Solution Assembly
- Data Adapters
- Grid Views and Dashboards to view data adapter output
- Custom table and Dashboard for Dimension mapping

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

QuickLaunch Data Model
QLA will configure the QuickLaunch Data Model for OneStream connected to the consolidations and planning reporting cube. The data model includes configuration of the Calendar table to match Customer's fiscal reporting calendar.

QuickLaunch Power BI Reports
QLA will install and configure sample Power BI reports tailored for OneStream data, including:

- Financial KPI reports
- GL Analysis report

QuickLaunch OneStream Tables and Related Hierarchies
The following list of dimension tables and associated hierarchies are included, where applicable:

- Entity and Entity Hierarchy
- Account and Account Hierarchy
- Scenario
- UD1 – UD8 Dimensions and Hierarchies
- Calendar

The UD1 – UD8 tables and columns can be renamed in the Power BI Data Model to match Customer's business terminology.

Currency Reporting
As long as the values are stored in OneStream, QLA will configure the data model to include both local and reporting currency values for OneStream entities.

Dimension Mapping

QLA will collaborate with Customer team to populate dimension mapping table that allows for member expansion filters for automating configuration in Power BI Data Model.

- Scenarios: Identify Actual and Plan/Forecast scenarios to include in the model
- Accounts: Identify Accounts for inputs to the pre-configured Financial KPIs

QuickLaunch Entity Row Security

QLA will configure Entity Row Security in the data model one time in the OneStream Production environment. Dynamic Row Security by user requires a mapping to the user email address, requiring each user to be set up with an associated email. Any users that are not part of the OneStream security groups will need to be set up either in OneStream or on a shared location (preferably SharePoint) by Customer. Any additional security requirements beyond Entity can be addressed as Consulting Services.

The fixed-fee installation includes the standard configuration (up to 16 hours of effort) to configure 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.

Source Control

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

QuickLaunch Installation Project

This Agreement describes the QuickLaunch Installation Project.

QuickLaunch Installation Project Approach

QLA uses a waterfall approach to install and configure the QuickLaunch solution.

- Prior to Project Kickoff, a Technical Review call will be conducted to validate technical requirements and provide a Recommended Resource Specification document.
- 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.

- QLA will perform data validation once the installation is complete, to compare dimensions, hierarchies, and data between Power BI and OneStream.
- 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 8 weeks or less. If a project runs longer than 12 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.

Customer Responsibilities

Technical Tasks

- Provide a client workstation VM for the installation team for the duration of the engagement, this can be done in Azure or on premises
- Set up user accounts and groups, plus provision VPN access to the workstation
- Purchase OneStream Power BI Connector
- Purchase required Power BI licensing: a. Power BI Premium Per User or b. Power BI Pro (if the solution is configured on a capacity basis)
- Purchase Tabular Editor 3 and Azure DevOps licensing for Customer's Data Model Administrators
- Set up a system account in OneStream to refresh the data in Power BI

Functional Tasks

- Participate in project kick-off and recurring meetings
- Participate in review sessions and provide the following:
    - Requirements for dimensions and hierarchies
    - Reporting requirements and KPI's
    - Data model security
    - Data refresh and data automation requirements

- Participate in Solution Previews and provide feedback
- Complete data validation and signoff
- Participate in training
- Sign off on the overall solution prior to migration

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.

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 OneStream, 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.

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 8:00 AM to 5:00 PM Pacific Time, Monday – Friday. Tickets received outside of the designated hours or on holidays will be collected, but action cannot be guaranteed until the next business day.