



## Qlik® Consulting Services Product Terms

These Consulting Services Product Terms ("Consulting Product Terms") provide a description of Qlik services provided with the Consulting Services product offerings below. These Consulting Services product offerings are governed by these Consulting Product Terms as well as any existing services agreement between Qlik and the Customer which governs the provision of consulting services, or if none, the Consulting and Education Services Terms at [www.qlik.com/legal-agreements](http://www.qlik.com/legal-agreements) ("Services Agreement"). In the event of any conflict between the Services Agreement and these Consulting Product Terms, these Consulting Product Terms will prevail.

### A. General Consulting Services

#### 1. Prepaid Consulting Services Days

Prepaid Consulting Services are consulting services that are paid in advance by Customer and delivered by providing the number of eight (8) hour calendar days set forth in an Order Form or as described in a Statement of Work ("SOW"). Prepaid Consulting Services activities may include assistance with configuration or implementation of Qlik Products. Prepaid Consulting Services rates are calculated based on the currency and location in which they are purchased. Prepaid Consulting Services days must be used within twelve (12) months from the date of purchase and performed within the country of purchase. Prepaid Consulting Services days may only be used in half or full day increments.

#### 2. Signature Success

2.1 Signature Success is a package of key services, including but not limited to Consulting, governance services, technical account management, Education Services, and Support, which are designed to assist Customer in building a successful foundation for a Qlik deployment(s). The offering focuses on aligning key services to assist in the delivery of the success goals outlined in a tailored customer success plan. The Signature Success offering aims to help Customer with:

- Aligning the Qlik platform to Customer's business objectives and strategy
- Driving product adoption and user enablement
- Enabling Service scalability when and where Customer needs it, reducing the complexity of Customer's engagement model with Qlik
- Leveraging the collective strengths of the entire Qlik ecosystem

2.2 The following organizational roles and services are part of Signature Success (described in further detail below):

- Customer Success Manager
- Customer Success Engineer
- 24 x 7 technical support for Severity 1 Errors
- 15 min SLA target for Severity 1 Errors
- Priority escalations management
- 300 Qlik Credits (per year) – for consumption of Consulting and/or Education Services
- Unlimited access to Qlik Continuous Classroom and Talend Academy
- Regular business reviews

2.3 Signature Success is offered as a subscription and if purchases separately, must be co-termed with a Customer's product Subscription Period.

#### 2.4 Customer Success Manager

- a. Signature Customers will be assigned a Customer Success Manager ("CSM"). A CSM refers to a Qlik resource who works proactively with Customer as a business advocate and acts as the first point of contact with Qlik. The CSM will be available during local business hours and are responsible for managing a select number of key strategic Customer accounts during the term of the contract. The CSM is responsible for working with Customer to create a joint Customer Success Plan ("CSP"). The CSP will outline the use cases, outcomes, and key business values to be achieved with corresponding success metrics. The CSM will then be responsible for aligning the appropriate resources available to the account to deliver against the CSP's metrics.
- b. CSM activities may include the following:
  - Create a tailored CSP to document the definition of success for an account and the proposed steps needed to achieve that outcome.
  - Facilitate monthly business reviews with Qlik's team of experts to review progress of the CSP and explore how Customer can leverage Qlik solutions to drive innovation.
  - Coordinate CSO Services consumption in line with success targets in the CSP
  - Assist Customer in designing an end-to-end user journey by facilitating access to our onboarding, collaboration, promotion and continuous learning resources.
  - Workshops to Identify personas, pathways for adoption, and necessary enablement. Identify the communication plan and monitoring of adoption for specific personas, as well as counter actions for lower than anticipated adoption.

- Be a first point of contact to engage with other CSO teams to ensure that any issues that might arise are managed through to successful resolution.
- Create workshops on data and analytics maturity. Work with Customer to assess and benchmark Customer's current state, then outline strategies and tactics to progress the organizations maturity.
- Establish program coordination to identify the various business project/workstream dependencies and highlight those interlocks to the Customer Success Plan. These include:
  - Facilitate of Qlik Consulting Services engagement – connect the Customer and Qlik Consulting, managing the credit certificate process.
  - Regular check-ins on Consulting Services progress and outcomes
  - Coordinate and assist CSE with activities, e.g. workshops, product demos, roadmap, etc.
  - Education and enablement assistance – persona mapping, assist developing learning paths and credits for instructor-led training.

**2.5 Signature CSE.** Signature Success includes access to Tier 2 Signature CSE as per the terms below.

**2.6 Support.** Signature Success includes access to Support Services as per the terms outlined in Section 3.4 below.

**2.7 Qlik Credits.** The CSP includes a plan of the Consulting and Education Services that will be delivered by consuming Qlik Credits in order to meet the objectives outlined in the CSP. Any unused Qlik Credits at the remainder of each year shall expire and be forfeited. Unused Credits may not be rolled forward into subsequent annual periods (within a multi-year subscription) or into any renewal period of the Signature Services.

- Use of Credits. Qlik Credits may be used by Customer to purchase consulting services and training solely from the selection of offerings available at [www.qlik.com/signatureservicescatalog](http://www.qlik.com/signatureservicescatalog) (the "Qlik Credit Catalog"). Qlik Credits may not be used against engagements not included in the Qlik Credit Catalog and may only be used for Consulting and Education Services in the country of purchase. The Qlik Credit Catalog is subject to change from time to time in Qlik's reasonable discretion.
- To redeem Qlik Credits for Services from the Qlik Credit Catalog, the CSM will provide to the customer a Customer Redemption Certificate (CRC) including the name of the specific offering being purchased, the number of credits expected to be consumed, and any travel expenses. Upon submission of the CRC to a Designated Customer Contact, Customer shall have seven (7) days to reject the CRC before Credits are redeemed. For the avoidance of doubt, an SOW shall not be required to consume the Qlik Credits.
- Additional Credits. Customer may purchase additional Qlik Credits (as defined in the Signature Terms) to use within Customer's existing Subscription Period. Any unused Qlik Credits at the remainder of each year shall expire and be forfeited. Unused Credits may not be rolled forward into subsequent annual periods (within a multi-year subscription) or into any renewal period of the Signature Services.

**2.8 Education Services.** Signature Success includes access to Education Services as per the terms in Section 3.7 below.

**2.9 Estimated Expenses.** A preliminary estimate of travel expenses is ten percent (10%) of the total fees paid for Signature Success. Actual expenses may vary. Customer is encouraged, but not required, to include an allowance for this amount its purchase order to Qlik. Expenses will not be incurred without Customer's prior written consent.

**2.10 Designated Customer Contact.** Customer will appoint individual(s) who are authorized and responsible for communicating with Qlik regarding Customer's consumption of the Signature Success benefits (including but not limited to, scheduling matters and/or the redemption of any Qlik Credits) (each such individual, a "Designated Customer Contact"). Designated Customer Contacts may be specified in an Order Form or otherwise in writing from Customer to Qlik. By appointing a Designated Customer Contact, Customer represents and warrants that each Designated Customer Contact is authorized to make such decisions and act on Customer's behalf and that Qlik may rely on the written communications of a Designated Customer Contact in its performance hereunder. Customer may change its Designated Customer Contact at any time upon written notice to Qlik.

### 3. Signature CSE

**3.1 Signature CSE.** Signature CSE is a subscription service that includes access to a Qlik resource, who serves as a designated point of contact providing technical advisory services on a given Qlik Product. The Qlik resource may be exchanged up to three (3) times per year during the Subscription Period. Each resource exchange requires advance notice via email to the currently assigned Qlik resource and is subject to the availability of resources with the requisite expertise. Signature CSE typically include the following key activities based on Tier. Activities shall be deemed as completed at Qlik's discretion.

CSE Tier*	Tier 3 \$100k USD to \$200k USD	Tier 2 \$200k USD to \$400k USD	Tier 1 \$400k USD
	Success Plan for technical outcomes	Success Plan for technical outcomes	Success Plan for technical outcomes
	Technical Environment assessment	Technical Environment assessment	Technical Environment assessment
	Roadmap/New Feature overviews	Roadmap/New Feature overviews	Roadmap/New Feature overviews
	Ongoing Advisory/technical Guidance	Ongoing Advisory/technical Guidance	Ongoing Advisory/technical Guidance
	Critical Issue technical collaboration	Operational assessment	Operational assessment
	Onboarding and CSP Planning	Critical Issue technical collaboration	Critical Issue technical collaboration
		App/DI Pipeline/Data Governance best practice review	Interactive instruction
		Proactive Technical Adoption Insights (Cloud only, subject to telemetry availability)	App/DI Pipeline/Data Governance best practice review

		Onboarding and CSP Planning	Proactive Technical Adoption Insights (Cloud only, subject to telemetry availability)
			Program Governance
			Onboarding and CSP Planning
			Business reviews

\*CSE Tier is determined based on Customer's annual subscription fee in USD or local equivalent for the Qlik Products on the Order Form on which Signature CSE is purchased. The Signature CSE Services shall only be provided in connection with the Qlik Products on the Order Form on which Signature CSE is purchased.

Activity definitions are as follows:

Activity	Description
Success Plan for technical outcomes	Plan created with the Customer to align CSE and Customer responsibilities against Customer technical objectives.
Technical Environment Assessment	Technical environment assessments will vary based on the Customer. Defined by the CSE and agreed with the Customer via the success planning process, or in response to an emerging issue. May focus on one or more areas depending on the need of the Customer, or advice of the CSE - e.g. infrastructure, platform set up, performance review, app or pipeline assessment etc.
Roadmap/New Feature Overviews	CSE led conversation, tailored to Customer based on their use cases and upcoming technical objectives
Ongoing Advisory/Technical Guidance	Provide technical and solutions guidance to aid in the execution of the Customers deployment. Typical guidance sessions are no more than 2 hours in duration
Operational Assessment	The outcome would be remediation plan/objectives and supporting related advisory/guidance sessions. Examples include: <ul style="list-style-type: none"> <li>Review of monitoring/logging/alerting setup.</li> <li>Review against best practices for operational efficiency (e.g. CI/CD, Automation etc.).</li> <li>Review of operational processes (e.g. issue triage, capacity mgt, incident/problem mgt).</li> <li>Ops team skill gap assessment (admin, troubleshooting, working with tech support).</li> </ul>
App/DI Pipeline best practice reviews	Review of app/DI data pipeline against best practices (incl. for performance optimization). DI pipeline includes Replicate task or Talend Studio job for example.
Adoption Insights	Provide advice/enabement on capabilities/features not used based on cloud telemetry.
Interactive Instruction	Detailed interactive instruction or assistance can be provided to Customer teams during working sessions, to help the Customer implement specific, challenging elements of a solution. In certain situations, sample/prototype scripts or configuration can be provided to accelerate project or operational delivery. Typical engagements are no more than 2 hours in duration and consecutive sessions cannot be continuations of the same subject matter.
Critical Issue technical Collaboration & Escalation	Typical activities include: <ul style="list-style-type: none"> <li>Monitor severity one cases and engage with the Customer and Qlik Support to facilitate communication and updates.</li> <li>Provide guidance to Customer when struggling to diagnose or isolate issue relating to Qlik platform.</li> <li>Help accelerate sharing of diagnostic info to Tech Support if Customer is uncertain on how/what to share, ensure Customer understands remediation activities, escalate when needed within Qlik.</li> </ul>
Program Governance	Overall coordination and alignment of customers business objectives with service delivery
Onboarding and CSP Planning	Customer onboarding and Development, maintenance of customers CSP (Customer Support plan)
Business reviews	Regular business reviews and assess the progress of the tasks outlined in the CSP

**3.2** The activities outlined above are available during regional business hours. Delivery resources are typically responsible for managing multiple Customer accounts during the term of the contract.

**3.3 Supplemental Service.** Signature CSE is intended to supplement and enhance Support Services and are not available on a standalone basis. Signature CSE is offered in twelve (12) month increments aligned with the Customer's Subscription Period, provided however, that Signature CSE shall automatically terminate in the event that Support Services (or subscription) are not renewed by the Customer or are otherwise terminated.

**3.4 Support.** In addition to any Enterprise Support for Supported Versions of Software or Cloud provided to Customer pursuant to the Qlik Support Policy or Service Level Agreement, Customer will be entitled to the additional benefits set forth below. The benefits of this section 3.4 require Customer to remain subscribed to Qlik Enterprise Support for the duration of the Subscription Period.

- Priority Call Access: When contacting Qlik Customer Support, Customer will have access to senior Technical Support Engineers (TSE's) to assist in case resolution. Customer will be prioritized in the call queue over other non-Signature Customers.
- 24 x 7 technical support for Severity 1 Errors: Signature provides the Customer with enhanced availability for all Severity 1 Errors as defined in the Support Policy available here: <https://www.qlik.com/us/legal/product-terms>.
- 15-minute SLA target for Severity 1 Errors: Qlik will use commercially reasonable efforts to respond within 15-minutes to Severity 1 Errors reported by a Customer Technical Contact to Qlik via telephone.
- Designate up to six (6) technical contacts within Customer's organization to interact with Qlik Support.

**3.5 Extended Support.** In addition to any Extended Support for End-of-Support Software purchased by Customer pursuant to the Qlik Support Policy, Signature CSE Customers will additionally be entitled to a Migration Assessment as further described in the [Qlik Credit Catalog](#). The benefits of this section 3.5 are only available to Signature Customers while additionally subscribed to Qlik Extended Support Tier 2.

**3.6 Qlik Credits.** Signature CSE Customers have the option to purchase Qlik Credits per the terms outlined in section 2.7. Signature CSE subscriptions do not include any Qlik credits as part of the standard subscription.

**3.7 Education Services Entitlements.** During the Subscription period, Customer will be provided access to Education Services, depending on Customer's Qlik Product licenses. Please refer to the Education Services Product Terms for additional information.

- Qlik Continuous Classroom Qlik Hosted (QCCQH): Customer will be provided access to all self-paced learning content for an unlimited number of named employees.
- Talend Academy: Customer will be provided access to all self-paced learning content for an unlimited number of named employees.

## B. Consulting Services- Qlik Products

The services in this section refer to consulting services provided in connection with the Qlik analytics and data integration products identified below.

### 1. Qlik Data Integration Starter Service

**1.1 CDC Data Streaming, Data Lake (DL) or Data Warehouse (DW) Starter Service.** Leveraging Industry best practice Qlik will work with the Customer to provide enablement and implementation expertise and solution deployment for either stand-alone Data Streaming (Replicate) or Data Streaming together with Data Warehouse Automation or Data Lake Creation (Compose) in Customer's environment. In addition, Qlik will work to integrate it with existing Customer systems including environment promotion from non-production to production.

**Prerequisites for CDC Data Streaming & Data Lake/Data Warehouse Starter Services.**

Qlik will perform a remote "pre-assessment" prior to beginning implementation. All prerequisites for the pre-assessment must be met prior to commencing work.

Services include the following:

- Remote Customer environment pre-assessment
- Qlik Data Integration Blended Learning for up to 2 attendees
- An architecture review and subsequent development of a best practice design architecture
- Replicate installation (1 non-production server & 1 production server)
- Enterprise Manager installation
- Implementation assistance for the LogStream endpoint is limited to 2 targets
- Replicate configuration:
  - o Up to 3 source endpoints, 2 target endpoint
  - o Up to 10 transformations limited to timestamps and simple name changes
  - o Up to 100 tables/2 TB initial load
  - o Apply and store changes
  - o Up to 7 tasks
  - o Does not include SAP on Db2 (LUW, z/OS) and HANA. These sources can be accommodated but will require the purchase of additional consulting assistance due to the complexity of integration.
- Compose configuration (of either):
  - o Compose for Data Lakes configuration (Up to 20 calculations, up to 5 storage tasks, data refreshed);
  - or
  - o Compose for Data Warehouse configuration (Up to 20 calculations, 1 data mart, 3 fact tables, 5 dimensions, 1 Model, 2 projects)
    - Limit of 20 tables for the model
    - RDBMS Sources only (does not include SAP on Db2 (LUW, z/OS, iSeries) and HANA). These sources can be accommodated but will require the purchase of additional consulting assistance due to the complexity of integration
    - Limit scheduler to 2 workflows
    - No non-Replicate sources
- Configuration documentation
- If desired, Qlik will perform a high-level pre-production health-check to help ensure readiness for production deployment
- Up to 6 months access to a CSE per the terms outlined in section 3

**1.2 Qlik Talend Cloud Data Integration Starter Service.** Leveraging Industry best practices, Qlik will work with the Customer to provide enablement, implementation expertise, and solution deployment for Qlik Talend Cloud.

**Prerequisites:**

- Customer and Qlik have confirmed any engagement dependencies required to begin the project and work with the stakeholders to determine a starting date for the engagement
- Customer has confirmed necessary equipment, resources and personnel are available throughout the engagement.
- Documentation including a description of the initial data integration use case and associated requirements has been shared with Qlik
- An agreed upon engagement schedule
- Downloads of relevant software install packages have been completed
- Required product licenses are available

- GIT source code repository is configured and available
- Customer has provided the hardware and software in support of the ingestion and replication processes as well as access to the source control repository (i.e. GIT)
- All dependent technology versions must be supported by Qlik, such as source code, SDLC (Software Development Life Cycle), Java, and any 3rd party libraries
- The number of jobs considers master/parent, and sub-jobs. A master job with 2 sub jobs counts as 3 jobs. A Talend job is a graphical representation of a business model that connects components to run a data integration process. Job design translates business needs into code, routines, and programs, which technically implements data flow. Jobs can address all data integration and data service processes, as well as other related processes

**Services include the following:**

- A Discovery Phase including:
  - Review of customer architecture for up to two (2) non-production environments and use cases
  - Review of customer business needs and document which components of Qlik Talend Cloud will be installed/configured
  - Review of what technologies will be configured for source code and endpoints
  - Facilitation of up to two (2) working sessions to align on architecture, non-functional requirements and use case scope to provide hardware sizing recommendations
- Configuration of up to two (2) non-production environments including:
  - Installation of one (1) Qlik Data Gateway Server in two (2) environments
  - User setup and authentication integration via Single Sign-On (SSO) within Qlik Cloud Tenant using a compatible identity provider (no custom-coded integrations) unless mutually agreed in writing
  - Configuration of one (1) Qlik Talend Cloud Tenant in two (2) environments
  - Configuration of one (1) Talend Project in two (2) environments
  - Installation of one (1) instance of Talend Studio
  - Installation of up to two (2) Talend execution engines in each environment
  - User setup and authentication integration via Single Sign-On (SSO) within Qlik Cloud Tenant using a compatible identity provider (no custom-coded integrations) unless mutually agreed in writing
  - Integration with up to one (1) compatible source control repository (i.e. GIT)
- Data Ingestion and Change Data Capture configurations including:
  - Replication of data from up to three (3) source(s) to one (1) target. Configure up to three (3) replication tasks from up to ten (10) tables
- Data Transformation & Loading Configurations including:
  - Configuration of up to three (3) Talend jobs to transform data
  - Orchestration up to three (3) jobs or tasks to publish execute the jobs / tasks and corresponding plans
- Documentation for knowledge transfer including:
  - Reference architecture diagram
  - Installation / configuration runbook
  - Up to two (2) knowledge transfer working sessions not to exceed 4 hours combined

At the conclusion of this engagement, Customer will have a Qlik Talend Cloud Data Integration environment that may consist of any of the following desired components configured and executing the agreed to ingestion, replication, transformation and loading use cases resulting in:

- An installation runbook and the successful execution of a test process to confirm functionality of the environment installation and configuration; ensuring servers, tenants, workstations, SSO, users, source and target connectivity, source code repository are functional
- A personalized reference architecture diagram
- A functional unit tested process consisting of up to 3 tasks ingesting and / or replicating data from source to target landing zone
- A demonstrated task/plan promotion between environments
- Orchestration of up to three (3) jobs or tasks to publish execute the jobs / tasks and corresponding plans
- Facilitation of up to two (2) knowledge transfer working session(s) to walk through the:
  - Installation / configuration runbook
  - Ingestion and change data capture processes
  - A visual walkthrough of administration assets that are configured for users, groups, roles, and project definitions
  - Transformation and loading processes
  - Job publication to the cloud and orchestration of the published item

## 2. Qlik Cloud Starter Services

The Qlik Cloud Starter Services offerings are comprised of a combination of Consulting and Education Services intended to assist Customers who are new to the Qlik Cloud Services (QCS) or Qlik Government Services (QGS) SaaS Platforms

### 2.1 Qlik Cloud Starter – New Qlik Customer

Qlik Cloud Starter is intended for Customers who are not currently active users of Client Managed Qlik Sense or QlikView and may include a combination of Consulting and Education Services. Any Education Services below are subject to the Education Services Terms at [www.qlik.com/product-terms](http://www.qlik.com/product-terms).

Services may include the following:

- **Deploy and Administer Qlik Sense SaaS Training** – Attendance by up to two (2) Customer personnel of the Deploy and Administer Qlik Sense SaaS Training
- **Create Visualizations with Qlik Sense Training** – Attendance by up to five (5) Customer personnel of the Create Visualizations with Qlik Sense Training Course
- **Data Modeling for Qlik Sense Training** – Attendance by up to two (2) Customer personnel of the Data Modeling for Qlik Sense Training Course
- **Configuration of Tenant.** Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik identity provider or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing Space access. Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a Customer on the monitoring of their new Qlik environment
- **Current State Review.** Qlik will work with the Customer personnel to define a target solution design and high-level migration roadmap with the Customer. Qlik will assist with:
  - A baseline inventory of existing BI applications or reports including relevant data sources and business use-cases. Inventory will include applications and reports associated with up to ten (10) business use-cases to be established and mutually agreed at the outset of the engagement
  - Identify and present opportunities, risks, and recommended mitigations for migration to Qlik Cloud consistent with leading practices
- **Basic Application Development.** Qlik will work with Customer business users to understand their needs and specific application requirements. Based on this work, Qlik will define a layout and use cases for the application to support and create an application based on these requirements, working with business users to refine the application based on business user feedback. The application will include data from one (1) data source, up to three (3) source tables, up to ten (10) master measures, and up to five (5) million rows. The implementation of row or column level security is not included
- **Advisory Presentation – Leading Practices** - Qlik will provide a presentation for basic enablement on the following topics:
  - Application Access for End Users
  - Application Development Lifecycle including Publishing to Production
  - Onboarding New Users

#### Pre-Requisites

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer will provide a named individual(s) for registration to the instructor led training
- Customer will provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer will configure identity provider, data sources and existing deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared following purchase, and the expectation is that those would be completed prior to engagement start

## 2.2 Qlik Cloud Starter – Current Qlik Sense Customer

Qlik Cloud Starter - Current Qlik Sense Customer is intended for Customers who are currently active users of Client Managed Qlik Sense and may include a combination of Consulting and Education Services. Any Education Services below are subject to the Education Services Terms at [www.qlik.com/product-terms](http://www.qlik.com/product-terms).

Services may include the following:

- **Deploy and Administer Qlik Sense SaaS Training** – Attendance by up to three (3) Customer personnel of the public Deploy and Administer Qlik Sense SaaS Training
- **Configuration of Tenant.** Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik IdP or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing Space access. Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a user on the monitoring of their new Qlik environment
- **Current State Review.** Qlik will work with the Customer personnel to define a target solution design and high-level migration roadmap with the Customer. Qlik will assist with:
  - A Baseline inventory and basic analysis of existing Client Managed Qlik Sense applications in one production environment using a Qlik Consulting SaaS readiness utility
  - Identify and present opportunities, risks, and recommended mitigations for migration to Qlik Cloud consistent with leading practices
- **Basic Application Development.** Qlik will work with Customer business users to understand their needs and specific application requirements. Based on this work, Qlik will define a layout and use cases for the application to support and create an application based on these requirements, working with business users to refine the application based on business user feedback. The application will include data from one (1) data source, up to three (3) source tables, up to ten (10) master measures, and up to five (5) million rows. The implementation of row or column level security is not included
- **Advisory Presentation – Leading Practices.** Qlik will provide a presentation for basic enablement on the following topics:
  - Application Access for End Users
  - Application Development Lifecycle including Publishing to Production
  - Onboarding New Users

- **Advisory Presentation – Contextualized Capabilities.** Qlik will provide a presentation in the context of goals shared by the Customer throughout the engagement on the capabilities and practices the Customer may wish to leverage on the QCS platform, and how the Customer might consider leveraging them to meet their objectives

**Pre-Requisites:**

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer will provide a named individual for registration to the instructor led training
- Customer will provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer will configure IdP, data sources and existing Qlik deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared at the start of the engagement and the expectation is that those would be completed prior to engagement start
- Gather any documents which describe:
  - Your current analytics estate, including architecture, use cases and analytics applications
  - Your data sources, data strategy and data roadmap
  - An outline of what you plan to move to Qlik Cloud
  - Your current processes and analytics operating model
- Where a hybrid environment including a Client-Managed element of Qlik software will be used, Customer will ensure:
  - Servers have internet connectivity to qlikcloud.com
  - Qlik Sense Enterprise Client-Managed versions are either the current version or one of the previous two major releases
  - The Qlik Sense SaaS Readiness application has been run
  - The Qlik Operations Monitor applications has been run

### 2.3 Qlik Cloud Starter – Current QlikView Customer

Qlik Cloud Starter is intended for Customers who are currently active users of Client Managed QlikView and may include a combination of Consulting and Education Services. Any Education Services below are subject to the Education Services Terms at [www.qlik.com/product-terms](http://www.qlik.com/product-terms).

Services may include the following:

- **Deploy and Administer Qlik Sense SaaS Training**– Attendance by up to two (2) Customer personnel of the Deploy and Administer Qlik Sense SaaS Training Course
- **Create Visualizations with Qlik Sense Training** –Attendance by up to five (5) Customer personnel of the Create Visualizations with Qlik Sense Blended Training Course
- **Data Modeling for Qlik Sense Training** – Attendance by up to two (2) Customer personnel of the Data Modeling for Qlik Sense Training Course
- **Configuration of Tenant.** Qlik will provide configuration of Customer's Qlik Tenant including user authentication either via the Qlik IdP or to accept a compatible Customer IdP without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing Space access. Qlik will also configure standard Monitoring Applications and standard Demonstration Applications and provide basic enablement to a Customer user on the monitoring of their new Qlik environment
- **Current State Review.** Qlik will work with the Customer personnel to define a target solution design and high-level migration roadmap with the Customer. Qlik will assist with:
  - A Baseline inventory of existing Client Managed QlikView applications in one production environment using a Qlik Consulting SaaS readiness utility
  - Identify and present opportunities, risks, and recommended mitigations for migration to Qlik Cloud consistent with leading practices
- **Basic Application Development.** Qlik will work with Customer business users to understand their needs and specific application requirements. Based on this work, Qlik will define a layout and use cases for the application to support and create an application based on these requirements, working with business users to refine the application based on business user feedback. The application will include data from one (1) data source, up to three (3) source tables, up to ten (10) master measures, and up to five (5) million rows. The implementation of row or column level security is not included
- **Advisory Presentation – Leading Practices. Qlik will provide a presentation for basic enablement on the following topics:**
  - Application Access for End Users
  - Application Development Lifecycle including Publishing to Production
  - Onboarding New Users



- **Advisory Presentation – Contextualized Capabilities.** Qlik will provide a presentation in the context of goals shared by the Customer throughout the engagement on the capabilities and practices the Customer may wish to leverage on the QCS platform, and how the Customer might consider leveraging them to meet their objectives

#### Pre-Requisites

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer will provide a named individual for registration to the instructor led training
- Customer will provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer will configure IdP, data sources and existing Qlik deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared at the start of the engagement and the expectation is that those would be completed prior to engagement start
- Gather any documents which describe:
  - Your current analytics estate, including architecture, use cases and analytics applications
  - Your data sources, data strategy and data roadmap
  - An outline of what you plan to move to Qlik Cloud
  - Your current processes and analytics operating model
- Where a hybrid environment including a Client-Managed element of Qlik software will be used, Customer will ensure:
  - Servers have internet connectivity to qlikcloud.com
  - Qlik Sense Enterprise Client-Managed versions are either the current version or one of the previous two major releases
  - The Qlik Sense SaaS Readiness application has been run
  - The Qlik Operations Monitor applications has been run

### 3. AutoML Starter Service

Qlik will engage with Customer to deliver an enablement-focused engagement resulting in a ML model developed against a Customer use-case in concert with Customer-personnel.

#### 3.1 Use-Case Selection: Qlik will work with the Customer to identify a business use-case that is mutually agreed to be a good fit for modeling with Qlik AutoML. Specific activities will include:

- Assessment of desired use cases including the amount of data and complexity of data engineering required to achieve good results with an ML model will be carried out with the Customer
- Qlik and Customer will agree on the use-case for this engagement ("Target Use Case") based on a quick analysis of benefits to the business, feasibility, technical complexity, availability and viability of necessary data, and constraints of current software licensing. The selected use-case will be the focus of the creation of the Qlik AutoML Model ("Target ML Model") to be delivered during this engagement

#### Assumptions:

- Customer has one or more business use-cases identified that they believe will benefit from the application of ML modeling using Qlik AutoML. Details about the use-case including expected benefits and impact as well as the necessary data sources and transformations should be available

#### Start Criteria:

- A kickoff meeting between Qlik and all relevant Customer stakeholders required to speak to the business and technical requirements, and other interested parties is scheduled at a mutually agreed upon time and duration
- Customer will have identified a individual(s) who will be primarily responsible for working with Qlik consultants on the creation of the "Target ML Model" and provided the necessary contact information prior to the start of the engagement
- Customer is currently using a licensed and fully functional instance of Qlik Cloud that has been configured and integrated to the extent required to conduct this engagement. Configuration of the Qlik Cloud SaaS tenant and integration with Customer systems including IDP are out of scope for this engagement

#### Acceptance Criteria

- The Target Use Case will be selected as mutually agreed between Qlik and Customer following activities described in section 6.1 of this document

#### 3.2 Enablement-focused ML Model Development: Qlik will work with the Customer to establish a schedule for the presentation of enablement content pertaining to Qlik AutoML which Qlik will provide during the course of this engagement. Qlik and Customer will iterate through the development of the "Target ML Model" such that model development activities will coincide with the most recent enablement content presented in a working session following the presentation of enablement content. The Customer may take additional actions between working sessions to further develop the model, and Qlik will review progress and address questions, or issues encountered prior to presenting the subsequent enablement materials. Specific activities may include:

- Establish a mutually agreed-upon schedule for the presentation of structured online enablement content around the preparation and use of Qlik AutoML. The schedule may not exceed more than four (4) weeks in total duration unless otherwise mutually agreed
- Iterative development of the "Target ML Model" through a series of working sessions of appropriate duration to complete the model development activities that correspond to the most recently consumed enablement content. The engagement may not exceed fifteen (15) working sessions. Working sessions will typically range from 30 to 60 minutes



- Delivery and overview of the final working model with key Customer stakeholders following the completion of all working sessions. The efficacy and accuracy of the model will be significantly dependent on the quality and relevance of the data provided to train the model. The “Target ML Model” will function as expected in relation to its ability to leverage training data to make predictions against an applied data set. The accuracy of the model in its ability to predict future outcomes cannot be guaranteed

#### **Assumptions:**

- Customer will make personnel with a working knowledge of relevant data and data sources available as needed through the course of the engagement to help ensure that the necessary data to train the model is available and appropriately engineered for consumption
- Data engineering activities to manipulate or transform Customer data are out of scope for this engagement. Qlik Professional Services has the ability to provide these services for an additional fee if desired

#### **Start Criteria:**

- Completion of Use-Case Selection
- The assigned Qlik Resource has been provided sufficient access to the Customer's Qlik tenant and any data or business documentation necessary

#### **Acceptance Criteria**

- The “Target ML Model” that conforms to the description in section 6.2 has been developed in collaboration with Customer personnel

## **4. Qlik Answers Starter Service**

Qlik will work with the Customer to configure the Customer's Qlik Tenant including user authentication either via the Qlik identity provider or to accept a compatible Customer identity provider without the use of custom coding, configuration of SMTP, and configuration of Customer user authorization for governing space access. Qlik will also work with the Customer to configure standard monitoring applications and standard demonstration applications and provide basic enablement to a Customer on the monitoring of their new Qlik environment including:

- Guidance on knowledge base structure including content and space segmentation based on customer use cases
- Assistance in the creation of up to three initial knowledge bases from compatible sources using Qlik Answers
- Assistance in the creation of up to one assistant using Qlik Answers
- Basic guidance on prompting the assistant following creation

### **4.1 Pre-Requisites**

The following prerequisites must be met prior to the start of the engagement:

- Acquisition of licenses for QCS or QGS SaaS platform
- Customer must provide access to relevant resources (IdP administrator, existing BI administrator, business analysts, BI developers, database administrator, data architect, etc.) as needed through the project
- Customer must configure identity provider, data sources and existing deployments as needed in a timely manner to support implementation
- Technical prerequisites and source/target setup instructions will be shared following purchase, and the expectation is that those would be completed prior to engagement start

### **4.2 Starter Service includes the following:**

- **Cloud Tenant Configuration:** The customer's Qlik tenant is configured for user authentication using either the Qlik identity provider or a compatible Customer identity provider without custom coding
- **Knowledge Base Guidance:** Qlik has provided up to one (1) working session in which guidance on the knowledge base structure, including content organization and Space segmentation based on customer use cases, is shared. This session will take place in a virtual meeting (e.g. Zoom) unless otherwise mutually agreed
- **Knowledge Base Creation:** Up to three initial knowledge bases are created from compatible sources using Qlik Answers
- **Assistant Creation:** One assistant is created using Qlik Answers
- **Prompting and Use Guidance:** Qlik has delivered up to one (1) working session in which basic guidance on how to prompt the assistant following its creation is provided. This session will take place in a virtual meeting (e.g. Zoom) unless otherwise mutually agreed

## **C. Consulting Services- Talend Products**

Consulting Services- Talend Products refers to consulting services provided in connection with the data integration products identified below.

### **1. Talend Cloud Starter Service**

Qlik will work with the Customer to provide mentorship and deployment expertise to initiate a first data management use case in Customer's Talend Cloud environment. Qlik will setup and install Talend Studio as the development environment and one Remote Engine where developed artifacts will be deployed and executed. Qlik will provide documentation of the performed installation and configuration and a sample Talend Job or a Talend Job design template for the initial use case.

Talend Cloud Starter Service is initiated with a kickoff meeting where Qlik will work with Customer's main point of contact to prioritize the areas to address and to validate all prerequisites are met. Following the kickoff meeting, a Qlik Consultant will work towards a three-step plan that includes the following services:

**Step 1:** Set-up and configuration of Customer's Talend Cloud tenant:

- Installation and configuration of Talend Studio for up to two users
- Review connectivity to sources (up to three systems) and targets (up to two systems)
- Installation and configuration of one Remote Engine for remote execution
- Creation of a test job, scheduling the job, job promotion to preferred execution engines for final installation/configuration validation
- Documentation including a write up of installation/configuration

**Step 2:** Application of best practices from the Talend Reference Architecture to Customer's designated environment.

**Step 3:** Enablement and mentorship on core capabilities working with Content:

- Review of Talend Cloud Administration and Operational functions
- Review of Software Development Life Cycle (SDLC) capabilities
- Creation of a Sample Talend Job or a Job Design Template based on the agreed initial use case
- Overview of additional Talend capabilities:
  - Talend Data Preparation
  - Talend Data Stewardship

**Prerequisites:**

All necessary equipment, resources and personnel are available throughout the duration of the engagement. Documentation including a description of the initial data management use case and associated requirements has been shared with Qlik.

Agreed engagement schedule.

- Downloads of Talend Software install packages have been completed
- Required Talend product licenses are available

Qlik recommends that the following Talend Academy trainings are completed prior to starting Talend Cloud Starter Services:

- Introduction to Talend Studio
- Talend Cloud Essentials
- Talend Data Integration Basics

## 2. Talend Data Management Starter Service

Qlik will work with the Customer to provide mentorship and deployment expertise to initiate first data integration or data quality use cases either on-premises, in the cloud, or in a hybrid architecture in Customer's environment. Qlik will setup and install Talend Studio as the development environment and one Remote Engine where developed artifacts will be deployed and executed. Qlik will provide documentation of the performed installation and configuration and sample Talend Jobs or Talend Job design templates for the initial use cases.

Talend Data Management Starter Service is initiated with a kickoff meeting where Qlik will work with Customer's main point of contact to prioritize the areas to address and to validate all prerequisites are met. Following the kickoff meeting, a Qlik Consultant will work towards a four-step plan that includes the following services:

**Step 1:** Set-up and configuration.

**Step 2:** Application of best practices from the Talend Reference Architecture to Customer's designated environment.

**Step 3:** Enablement and mentorship on core capabilities working with Customer Data.

**Step 4:** Design, use case implementation and testing following a collaborative approach.

**Prerequisites:**

- All necessary equipment, resources and personnel are available throughout the duration of the engagement
- Documentation including a description of the initial data integration or data quality use cases and associated requirements has been shared with Qlik
- Agreed engagement schedule
- Downloads of Talend Software install packages have been completed
- Required Talend product licenses are available

Qlik recommends that the following Talend Academy trainings are completed prior to starting Talend Cloud Starter Services:

- Introduction to Talend Studio
- Talend Cloud Essentials
- Talend Data Integration Basics
- Talend Data Quality Essentials

## 3. Talend Data Catalog Starter Service

Qlik will work with the Customer to provide mentorship and deployment expertise to initiate first metadata management use cases in Customer's environment. Qlik will provide documentation of the performed installation and of the Data Catalog in the Customer's environment along with the defined metadata models, business glossary, metadata management processes, security model based on the roles and responsibilities of the IT stakeholders.

Talend Data Catalog Starter Service is initiated with a kickoff meeting where Qlik will work with Customer's main point of contact to prioritize the areas to address and to validate all prerequisites are met. Following the kickoff meeting, a Qlik Consultant will work towards a four-step plan that includes the following services:

**Step 1:** Set-up and configuration:

- Review and define Architecture, Design, and Infrastructure prerequisites
- Review connectivity to metadata sources (up to three systems)
- Documentation including a write up of installation/configuration

**Step 2:** Application of best practices from the Talend Reference Architecture to Customer's designated environment.

**Step 3:** Enablement and mentorship on core capabilities working with Customer metadata assets including harvesting, stitching, and building a metadata catalog:

- Creation of a Business Glossary including taxonomy and structure
- Definition of the logical and physical data models
- Definition of the metadata model
- Definition of the metadata repository structure
- Definition of a security model based on roles of responsibilities of the IT stakeholders
- Harvesting metadata
- Stitching and establishing lineage
- Definition of metadata processes
- Testing and Validation of metadata sources and targets, metadata processes

**Step 4:** Establish alignment of information across the business and IT stakeholders.

**Prerequisites:**

- All necessary equipment, resources and personnel are available throughout the duration of the engagement
- Documentation including a description of the initial metadata management use cases and associated requirements has been shared with Qlik
- Agreed engagement schedule
- Downloads of Talend Software install packages have been completed
- Required Talend product licenses are available

Qlik recommends that the following Talend Academy trainings are completed prior to starting Talend Data Catalog Starter Services:

- Talend Data Catalog Basics
- Talend Data Catalog Advanced

## D. Legacy Consulting Services

### 1. Customer Success Engineer (CSE).

**1.1 Customer Success Engineer (CSE).** A CSE or QDI CSE refers to a Qlik resource, who serves as a designated point of contact for up to six (6) technical contacts designated by a customer for technical support. CSE services are only available to customers who are current on their support or subscription obligations. Typical CSE activities include the following:

- Direct access to a CSE with knowledge of Customer's environment and priorities
- Provide technical and solutions guidance to aid in the execution of the customers deployment
- Conduct bi-annual platform reviews to provide recommendations on best practices
- Provide ad-hoc assistance to address critical issues as they arise
- Conduct a full Qlik Architecture review on a single production environment
- Deliver standard Qlik workshops designed to provide insights and best practices on the Qlik platform. Standard workshops are typically 1-3 hours in duration
- Provide basic install, configuration, and upgrade guidance. No hands-on keyboard or live assistance during actual upgrade

**1.2 Extended Customer Success Engineer (Extended CSE).** An Extended CSE refers to a Qlik resource, who serves as a designated point of contact for up to six (6) technical contacts designated by a customer for technical support. CSE services are only available to customers who are current on their support or subscription obligations. Typical CSE activities include the following:

- Direct access to a CSE with knowledge of Customer's environment and priorities
- Provide technical and solutions guidance to aid in the execution of the customers deployment
- Conduct up to 3 platform reviews per annum to provide recommendations on best practices
- Conduct up to 2 Qlik Architecture reviews per annum on a single production environment
- Deliver standard Qlik workshops designed to provide insights and best practices on the Qlik platform. Standard workshops are typically 1-3 hours in duration
- Deliver Standard and Enhanced Qlik workshops designed to deliver insights on complex techniques and skills necessary to succeed with the Qlik platform. Enhanced Qlik workshops are typically 4 hours or more in duration.
- Provide basic install, config and upgrade guidance when needed
- Deliver specialized technical knowledge, advanced troubleshooting, and coordination with additional Qlik resources, if needed, to facilitate problem resolution
- Enhanced technical guidance and "hands on" assistance can also be provided through onsite visits and live interaction in support of technical issues resolution and upgrade/configuration support

**CSE and Extended CSEs.** CSEs are available during regional business hours and are typically responsible for managing up to 6 customer accounts. Extended CSEs are available during regional business hours and are typically responsible for managing up to 3 customer accounts. In the event a CSE or Extended CSE is on leave or support is needed outside of regional business hours, inquiries will be directed to support specialists.