Section III

Publish Workload Requirements Attestation Checklist

We, the vendor, Lumel Technologies, Inc., confirm and attest to reviewing, meeting and complying with the requirements outlined in the Microsoft Fabric Workload Development Kit (WDK) specifically the **Publish Workload Requirements** located at https://learn.microsoft.com/en-us/fabric/workload-development-kit/publish-workload-requirements.

The following sections documents details, exceptions, or variances regarding the attestation of adherence to the **Publish Workload Requirements**.

Business Requirements:

1. **Value To Customers:** The workload provides the following value to customers

   Lumel EPM empowers enterprises to unify planning, BI and data apps on Microsoft Fabric. The platform is designed for business users and adopts a no-code, self-service architecture. It allows organizations to build apps on top of the semantic models, extending returns on Power BI investments.

2. **Trial:** We provide an easy and fast trial experience. The trial is available to the customer without waiting time (less than 5 seconds), and provides a free and easy way to explore the offered workload for a limited time in accordance with Microsoft guidelines for Trials[1]

   [X] Yes   [ ] No

   We provide 15 days full-feature trial.

3. **Terms and conditions:** You need to provide your customers with terms and conditions for the offer you provide on the platform. In the terms and conditions you need to highlight the

   Terms and conditions are available at https://lumel.com/terms-of-service/

4. **Metadata:** Metadata such as title, summary, and icon, must be identical in the Workload package manifest and the SaaS offer submission in Partner Center. Add all the assets of the workload such as icons and screenshots under `fe/assests` directory. Your workload package has to comply with the frontend and backend manifest requirements.

   The workload package and SaaS offer submission contain identical assets.

5. **Attestation Document:** Partners need to provide a page that contains all the information about their workload publishing requirements status. This document needs

to be linked in the Workload Package and kept up-to-date. You must add the link in the workload metadata manifest under the `supportLink` field in `certification`. The link must also appear in the workload product page in the Workload Hub.

Attestation document is linked in the manifest.

6. **Marketplace Offer:** Partners need to enlist a SaaS offer in Azure Marketplace. This offer can just be a *contact us* listing to get leads from the platform. We expect partners to also transact over the Marketplace. You can build Bring Your Own License (BYOL) capabilities into your workload.

   https://azuremarketplace.microsoft.com/en-us/marketplace/apps/xviz.powertable-saas-offer

7. **Documentation:** You need to provide documentation for your Workload to customers in an easy and understandable form.

   https://docs.lumel.com/

Technical Requirements:

1. **Microsoft Entra Access:** The workload(s) use Microsoft Entra authentication and authorization[3].
   [X] No additional authentication and authorization mechanisms are used
   [ ] Additional authentication and authorization mechanisms are used for stored data In Fabric

   Extra requirements:

   [X] The workload must take a static dependency on *https://analysis.windows.net/powerbi/api/Fabric.Extend scope* and get user consent for it.

2. **One Lake:** Workloads need to integrate with One Lake[4] to store data in the standard formats supported by the platform so that other services can take advantage of it.
   [ ] All data and metadata is stored in One Lake or Fabric Data Stores
   [X] Not all data and metadata is stored in One Lake or Fabric Data Stores
   Configuration, audit, and other metadata are stored in the Lumel EPM application database. EPM utilizes Azure SQL Database for storing application data, ensuring all customer data is encrypted and securely stored. For self-hosted customers, the data will be stored within their own Azure tenant, providing them with full control and security over their data.

3. **Microsoft Entra Conditional Access:** Enterprise customers require centralized control and management of the identities and credentials used to access their resources and data and, in Microsoft, Microsoft Entra provides that service[5].
   [X] The service works in its entirety with even if customers enable this functionality
   [ ] The service works in with limitations if customers enable this functionality
   [ ] The service does not work Microsoft Entra Conditional Access

4. **Admin REST API:** Admin REST APIs are an integral part of Fabric admin and governance process. These APIs help Fabric admins in discovering workspaces and items, and enforcing governance such as performing access reviews, etc.

   [ ] Microsoft Fabric Admin API's are being leveraged (/admin/*)
   [X] No Microsoft Fabric Admin API's are being used

5. **Customer Facing Monitoring & Diagnostic:** Health and telemetry data needs to be stored for a minimum for 30 days including activity ID for customer support purposes.
   [X] Minimum 30 days requirement is adhered to
   [ ] Vendor stores the data for ___additional days beyond the minimum requirement

6. **B2B:** The Fabric sharing strategy is focused on allowing customers to collaborate with their business partners, customers, vendors, subsidiaries, etc. It also means users form other tenants can potentially be granted access to items partner are creating[6]
   [X] Cross tenant B2B collaboration supported
   [ ] Workload Item Access only within the tenant

7. **Business Continuity and disaster recovery:** Fabric commits to a seamless service availability to customers. We recognize the importance of planning for unforeseen events in a world of uncertainties. We ask partners providing workloads to customers within Fabric to define Business Continuity and Disaster Recovery (BCDR) plans designed to tackle unplanned disasters and recovery steps.

   BC/DR strategy is available.

8. **Performance:** The Workload implementation takes measures to test and track performance of their Items

[ ] Performance Metric on workload performance are available via monitoring hub

[X] Performance tracking is not currently available to the end user however vendor support personnel can monitor, test, track performance via their internal instrumentation and monitoring systems

> *At Lumel we use Azure Log Analytics and Application Insights for health and performance monitoring.*

9. **Presence:** To ensure that customer expectations independent of their home or capacity region are met, partners need to think how they want to align with fabric regions[7] and clouds. Availability in certain restrictions also impacts your Data Residency commitments.

[X] Service availability and colocation/alignment in the following fabric regions

> *The Lumel EPM service currently operates in the Central US and West EU regions. For self-hosted customers, the data resides within their own Azure tenant, ensuring they have full control and security over their data.*

[ ] All or part of the service does not reside in Azure

Design / UX Requirements:

1. **Common UX:** The workload and all item types the partner provides as part of it comply with the Fabric UX guidelines[9].

[ ] The following variance and/or exceptions have been granted by Microsoft

[X] No exceptions have been granted by Microsoft

2. **Item Creation Experience:** Partners need to comply with the Item creation experience according to the Fabric UX System[10].

[X] Yes

[ ] No

3. **Monitoring Hub:** Long running operations need to integrate with Fabric Monitoring Hub.[11].
   [ ]Yes
   [X] No

   Not Applicable, Lumel EPM does not have any long running operations.

4. **Trial Experience:** Partners are required to provide a Trial Experience for users as outlined in the design guidelines.[12]
   [X] Trial Supported
   [ ] Trial Not Supported

5. **Monetization Experience:** Partners that want to monetize their solution in fabric need to follow the patterns defined in the Fabric Templates[13]

   Lumel EPM follows the Fabric UX guidelines for monetization.

6. **Accessibility:** The user experience follows the Fabric UX design guidelines for Accessibility[14]
   [X] The user experience is completely compliant with the guidelines
   [ ] The following limitations exist

7. **World Readiness / Internationalization:** English is supported as the default language. Content can be localized.
   [X] English is the only supported language
   [ ] The following are the additional languages supported

8. **Jobs to be done:** To be listed in different create experiences within Fabric, you need to onboard to the Jobs to Be done definition for your Item types.

Listed under Prepare Data

9. **Item Settings:** Item settings are implemented as a part of the ribbon as outlined in the UX guidelines[15]
[X] Yes
[ ] No

10. **Samples**: Samples are optionally provided that preconfigure items of their type their type to help customers get started more easily.
[ ] Samples not provided
[X] Sample provided

When creating a new PowerTable item in the Lumel EPM Workload, the onboarding screen will provide an option to select and work with pre-configured sample data

11. **Custom Actions**: Partners can implement custom actions as part of their item editor.
[X]   Custom Actions are not implemented
[ ]   Custom Actions implemented as part of Workload

12. **Workspace settings**: Workspace settings provide a way that workloads can be configured on a workspace level.
[ ] Supported
[X] Not Supported

13. **Global Search**: Searching for items in Fabric is supported through the top search bar.
[ ] Supported
[X] Not supported

Security/ Compliance Requirements:

1. **Security general:** Microsoft customers entrust Fabric with their most sensitive data. As partners implementing workloads can have access to this data, they also

Lumel EPM goes through SAST & DAST regularly. Also, penetration testing is done periodically with third party assistance. In addition to these, cloud security scans are done periodically.

have a responsibility to protect that data. Workloads should go through a security assessment, a security review and attest that they did it.

2. **Privacy:** Microsoft customers entrust Fabric with their most sensitive data. As such, partners the build workloads also have a responsibility to protect that data when they access it. Every workload should go through a privacy assessment and a privacy review.
   Extra Requirements:
   [X] *Workload owners can only use essential HTTP-only cookies. Workload can use them only after positively authenticating the user. Only use same-origin cookies*
   [X] *Partner workloads aren't to use, write, or rely on third-party cookies*
   [X] *Publisher must only obtain any Microsoft Entra token using the JavaScript APIs provided by the Fabric Workload Client SDK*

3. **Data Residency:** Fabric is making an Enterprise Promise around data not leaving the geography[19] of the tenant for stored data and data in transit. Partner needs to define what their commitments are to the Data Residency of customer data.
   The Lumel EPM SaaS service currently operates in the Central US and West EU regions. For self-hosted customers, the data resides within their own Azure tenant, ensuring they have full control and security over their data.

Support:

1. **Live site:** Partner workloads are becoming an integral part of Fabric. Partners need to provide the contact details as part of the publishing process.
   Microsoft direct vendor outreach:

Contact Name/Team:	Lumel EPM Support
Email	support@lumel.com
Contact Us Form	https://lumel.com/contact-us/

2. **Supportability[21]:** Partners are responsible to define and document their support parameters (Service level agreement, contact methods, ...). This information needs to be linked from the Workload page and should always be accessible to customers. In addition, the Marketplace criteria, need to be considered for the listing of the SaaS offer.
   [X] We confirm that support information is published in the marketplace offering and is directly accessible to users/customers through the workload

3. **Service Health and Availability:** Partners need to host a website that shows their service health and availability to customers. This information can be included in the Supportability page.

   The service health and availability can be found here – https://status.lumel.io

Fabric Features:

1. **Application Life Cycle Management (ALM) [23]:** Microsoft Fabric's lifecycle management tools enable efficient product development, continuous updates, fast releases, and ongoing feature enhancements
   [ ] Supported
   [X] Not Supported

2. **Private Links[24]:** In Fabric, you can configure and use an endpoint that allows your organization to access Fabric privately.
   [ ] Supported
   [X] Not Supported

3. **Data Hub:** The OneLake data hub[25] makes it easy to find, explore, and use the Fabric data items in your organization that you have access to. It provides information about the items and entry points for working with them. If you're implementing a Data Item, show up in the Data Hub as well.
   [ ] Supported
   [X] Not Supported

4. **Data Lineage:** In modern business intelligence (BI) projects, understanding the flow of data from the data source to its destination can be a challenge. The challenge is even bigger if you built advanced analytical projects spanning multiple data sources, data items, and dependencies. Questions like "What happens if I change this data?" or "Why isn't this report up to date?" can be hard to answer.
   [ ] Supported
   [X] Not Supported

5. **Sensitivity labels:** Sensitivity labels[26] from Microsoft Purview Information Protection on items can guard your sensitive content against unauthorized data access and leakage. They're a key component in helping your organization meet its governance and compliance requirements. Labeling your data correctly with sensitivity labels ensures that only authorized people can access your data.
   [ ] Supported

[X] Not Supported

Extra requirements:

For partners that are using Export functionality within their Item they need to follow the guidelines.

[X] The export functionality has been implemented in accordance with the guidelines.

[ ] No export functionality is provided.