

1) Work Package: Microsoft Fabric Expert Enablement

a. Scope

i. Customer Scope

Customer Variable	In Scope
Organisation (s)	Netwealth
Location	UK

ii. Service Scope

Service Variable	In Scope	Out of Scope
Resources	Microsoft Fabric	All other resources

b. Agreed Work Location

Work delivered for the Service will be conducted remotely from Bytes' registered offices, or proxy locations of employees.

c. Prerequisites

Item	Responsibility	Ready By
Logistics & Collaboration Platform	Supplier to provide collaboration tools (e.g. Teams, SharePoint) for scheduling, notes, and sharing interim materials.	At project kick-off
Stakeholder Availability	Customer to provide access to appropriate business and technical stakeholders for workshops, interviews, or follow-up correspondence.	Discovery phase
Customer Point of Contact & Subject Matter Experts	Customer to nominate appropriate points of contact for project coordination (primary contact, technical lead) and domain-specific SMEs (data stewards, governance leads, business experts) for their respective work package phases.	Discovery phase
Maintenance/ Implementation Windows	Customer to identify and schedule appropriate maintenance/implementation window(s) for deployment and configuration activities.	Discovery phase
Access to Relevant Documentation	Customer to share existing documentation (e.g. architectural diagrams, strategy papers, compliance policies) that supports understanding of the current environment.	Discovery phase
Access & Permissions	Customer to provide timely access to all required systems (cloud and on-premises), documentation, data sources, networks, and environments, with appropriate permissions for supplier to perform configuration, deployment, and development activities.	Implementation phase
Azure & Microsoft 365 Licensing	Customer to provide active Azure subscription. If using trial entitlement, ensure validity for pilot duration. Customer must have Microsoft 365 E3, E5, or Business Premium licensing where required (e.g. for sensitivity labels in Purview).	Implementation phase

Network & Security Readiness	Customer to provide network configuration details (e.g. vNet's, peering, security policies) and ensure required network routes, firewall rules, private endpoints, gateways, and security policies are configured and in place.	Implementation phase
Configuration & Mapping Templates	Supplier to provide templates for configuration variables (e.g. naming conventions, CIDR ranges, service principals) and data source mappings (connection details, data types, refresh cadence). Customer to complete and return for supplier validation.	Implementation phase
Fabric Environment Availability	Completion of the Deployment & Configuration Work Package, including deployed Fabric capacity, workspaces, and connectivity.	Prior to commencement of Hydration activities
Validated Datasets	Datasets must exist in appropriate layers (Bronze/Silver) with stable schema, confirmed ingestion performance, and validated data quality.	Prior to commencement of Curation activities

d. Deliverables

This Service will produce the following Deliverable(s):

Deliverable	Description	Frequency	Sign-Off
Discovery Questionnaires (Business & Technical)	Completed and annotated questionnaires capturing customer inputs and supplier findings.	Once	Discovery
Assessment & Recommendations Report	Findings, gap analysis, prioritised recommendation, and pilot-focused roadmap.	Once	Discovery
Executive Summary Presentation	Concise summary of discovery outcomes for leadership/ stakeholders.	Once	Discovery
Pilot Fabric Environment Deployed & Configured	Fabric capacity and supporting Azure resources deployed and configured for pilot.	Once	Implementation
Data Ingestion Pipelines	Validated pipelines landing structured, semi-structured, or streaming data into Bronze.	Once	Implementation
Ingestion Framework Configuration (where applicable)	Metadata-driven, reusable ingestion patterns implemented within Fabric.	Once	Implementation
Design documents	Comprehensive architectural overview, outlining key design principles, and defines the scope of the pilot environment. Incorporating detailed configuration aspects including capacity planning, workspace allocation, access controls, networking setups, integrations, pipeline architecture, and framework specifications. All deployment activities, data ingestion processes, and curation outcomes are documented within a single, consolidated as-built report to ensure clarity and completeness.	Once	Implementation
Acceptance Test Specification & Results	Single consolidated acceptance pack covering end-to-end validation across phases.	Once	Implementation

e. Service Specification

Bytes will provide an Expert enablement program to make best use of the Microsoft Fabric platform.

i. Microsoft Fabric Enablement

Module Overview: Enterprise-grade, best practice, governance & optimisation guidance on Microsoft Fabric, and supporting the deployment of a pilot solution.

Inclusions	The project will be split into 5 distinct modules: Discovery & Advisory - Facilitated discovery using predefined questionnaires and workshops with business and technical stakeholders. - Assessment and gap analysis of the current environment and capabilities. - Prioritised recommendations and a pilot-focused adoption roadmap. - Executive summary of findings for leadership/stakeholders. Deployment & Configuration
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- Deploy and configure a pilot-ready Microsoft Fabric environment using standardised templates.
- Base networking and security enablement (e.g., gateway, Entra ID groups, least privilege access).
- Integrate Azure DevOps for CI/CD and Fabric deployment pipelines.
- Enable baseline monitoring and logging; produce Design including as-built documentation.

Lakehouse Hydration

- Design and implement ingestion pipelines for structured, semi-structured, or streaming data into Bronze using supported connectors, based on two data sources only, including Azure Table and Dataverse.
- Apply metadata-driven/reusable ingestion patterns where applicable.
- Validate ingestion runs and establish monitoring for pipeline health and execution.

Data curation

- Transform Bronze/Silver data into curated, business-ready datasets.
- Apply reusable transformation patterns and perform performance optimisation.

Exclusions

Non-Fabric or Out-of-Scope Azure: Configuration of Azure resources outside Microsoft Fabric; server configuration; application deployment; on-premises firewall configuration.

Enterprise-Scale Platforms: Enterprise landing zones, multi-region architectures, cross-tenant/multi-account setups, or production-grade enterprise platform builds beyond pilot scope.

Advanced Identity & Access: Design or implementation of enterprise-wide IAM frameworks, conditional access policies, Privileged Identity Management (PIM), dynamic masking, or row-level security models.

Enterprise Networking & Security Architecture: Comprehensive network architecture, large-scale connectivity programmes, security zoning, or broad security policy redesign/approvals beyond pilot requirements.

Operations & Monitoring: Ongoing managed operations or support services; continuous monitoring; custom/advanced alerting; SIEM/SOC integrations; AI/ML-based anomaly detection.

Non-Pilot Data Activities: Ingestion of historical/archive data older than 3 months; ingestion of new sources outside agreed pilot scope.

Data Transformation Outside Curation: Complex ETL frameworks or bespoke orchestration tools outside Fabric-native capabilities.

Business Rule/KPI Validation: Enterprise KPI testing, business UAT, visualisation/report validation beyond curated dataset outputs.

No Data Modelling: Including Conceptual, logical, or physical data modelling at enterprise scale; broad semantic model development; Power BI reports/dashboards.

Advanced Performance Tuning: Platform-level capacity planning, caching strategies, infrastructure optimisation beyond dataset-level tuning.

Training & Foundational Education: Foundational training on data/analytics concepts beyond pilot enablement.

Purview Implementation: No purview implementation included as part of this project

	Procurement of hardware, software and licensing unless explicitly stated in this document Follow on tasks or documentation, unless explicitly stated in this document.
Dependencies	Appropriate RBAC Access to the target environment Availability of appropriate stakeholders Completion and return of prerequisite configuration templates Provision of relevant documentation and metadata Required network routes, gateways/private endpoints, and security policies configured to enable connectivity between source systems and Azure Permission to record or transcribe meetings where required
Key Information / Assumptions	Customer has an Azure agreement and can provision one or more Azure Subscriptions.
Product(s)	Discovery & Advisory Business & Technical Questionnaires Data Profiling Template Fabric Deployment & Configuration Prerequisite Template Design Documentation Operating Procedures Acceptance Test Specification & UAT template
Bytes Resource	Microsoft Fabric Consultant
Customer Resource	Data and Analytics Lead, Infrastructure Lead, IT Security lead

