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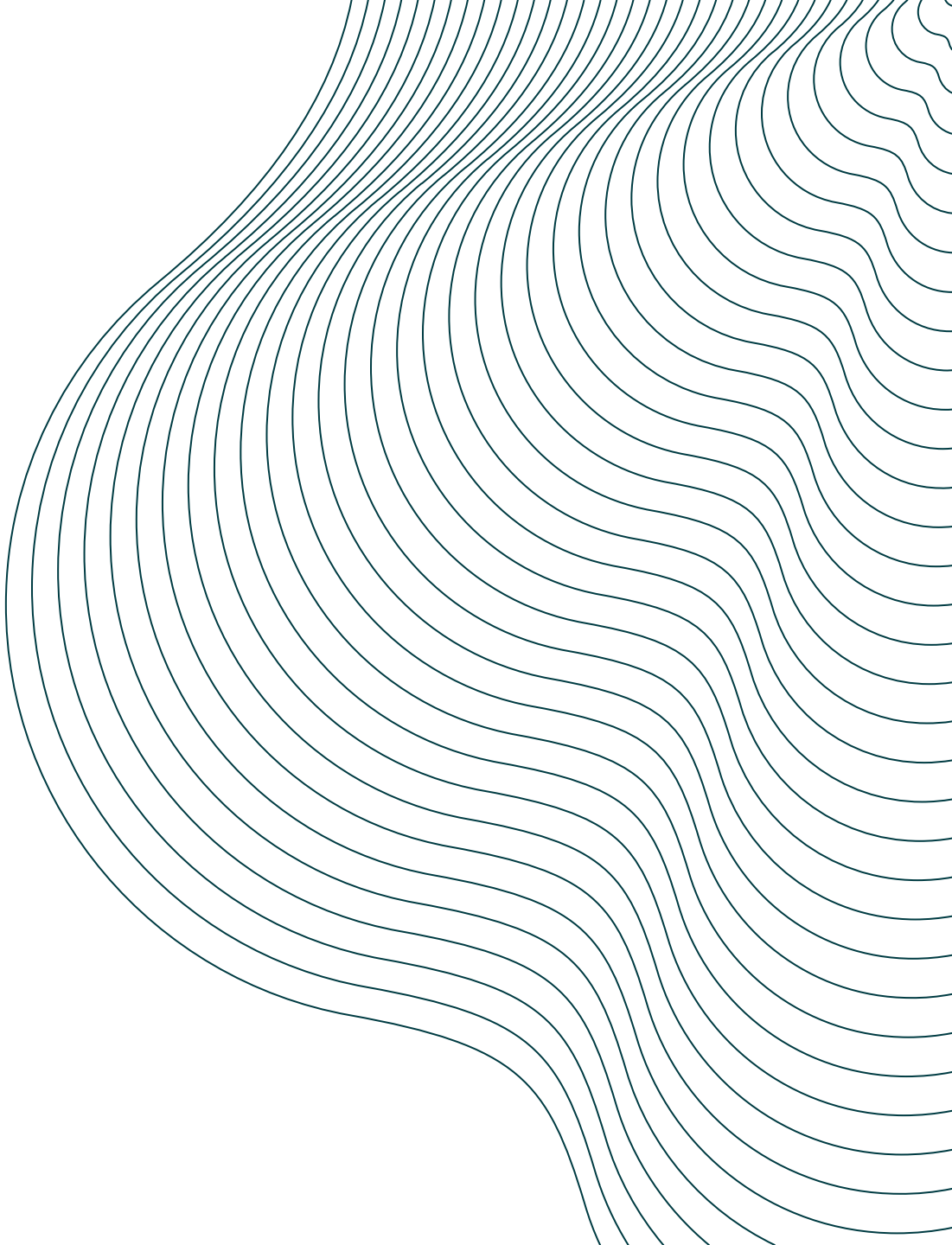
Getting started with Microsoft Fabric: Defining your Fabric Playbook



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Microsoft Fabric


Data Factory


Real-Time Intelligence


Databases


Analytics


Industry Solutions


Power BI


Partner solutions


Copilot in Fabric


OneLake

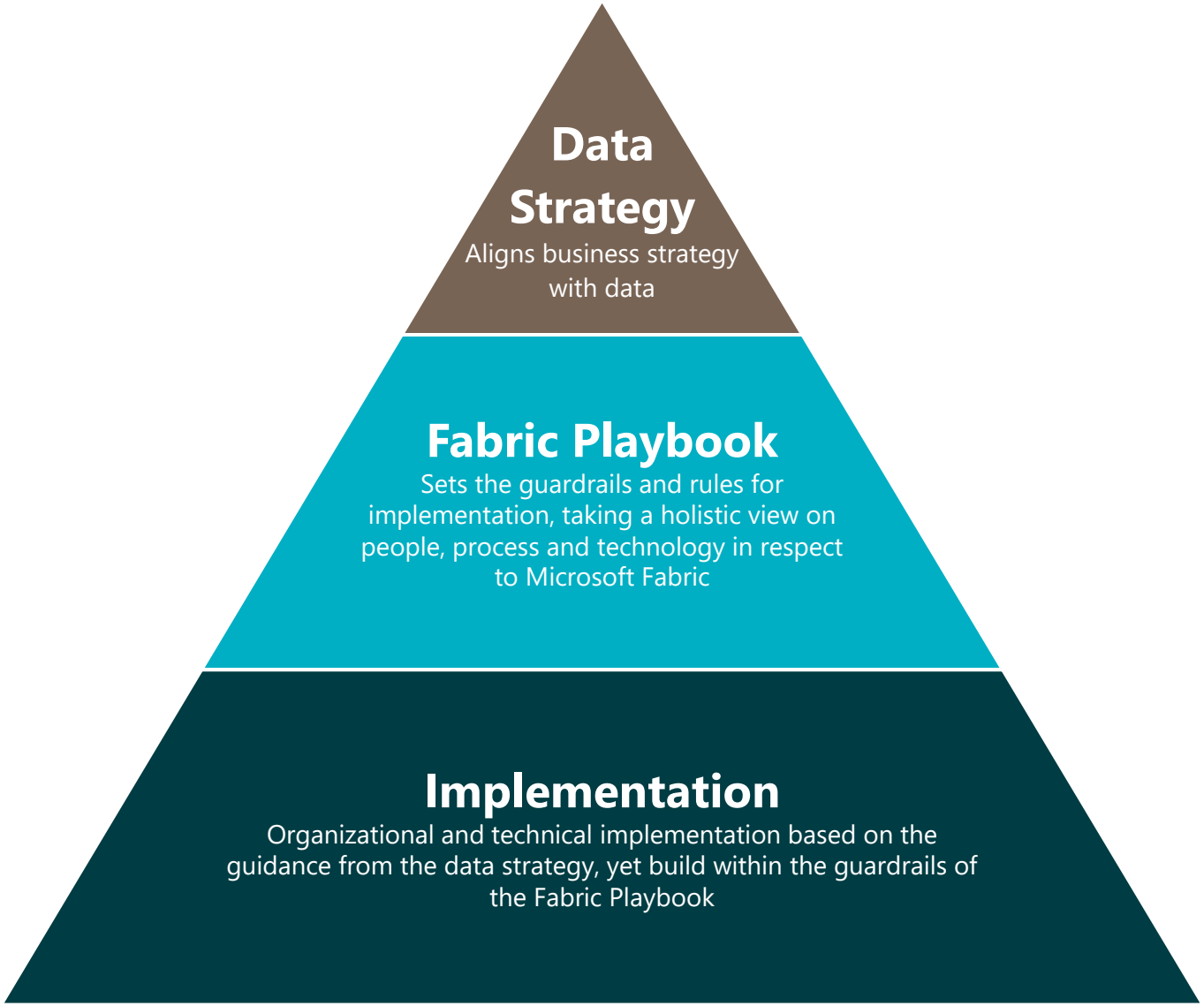

Microsoft Purview

Fabric Playbook:
Where does it fit?

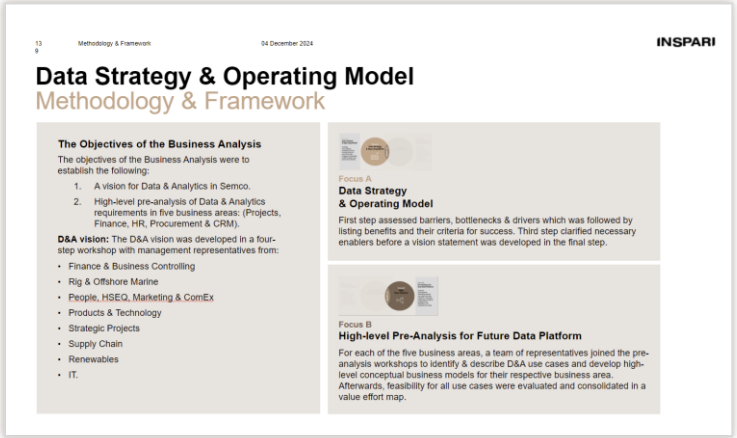
The Fabric Playbook tries to bridge the gap between a high-level Data Strategy and the actual implementation work happening after the strategy has been approved.

The Fabric Playbook guides organizations in designing a Data Platform that fits their organizations and provides a set of “plays” to follow when faced with different scenarios.

Furthermore, the Playbook assists in the overall design of the Data Platform, and ensure that implementations are done targeting a common goal

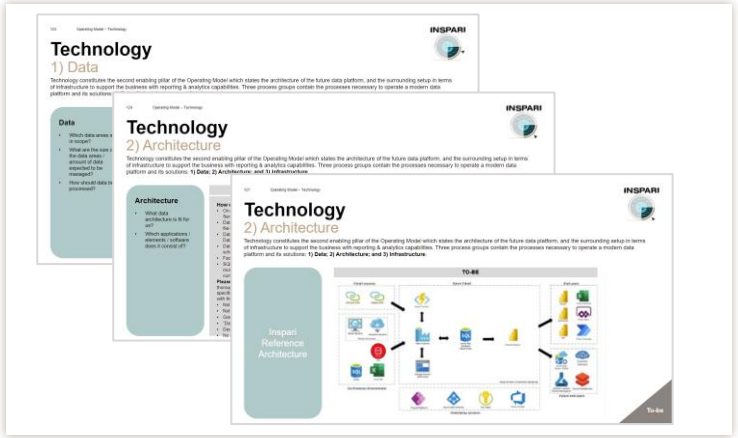


Fabric Playbook:
What is it, and how do we use it?



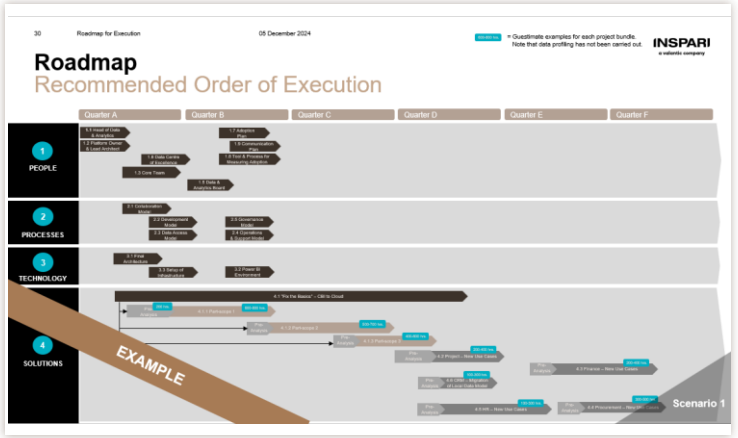
OUR GUIDING PRINCIPLES

The Fabric Playbook outlines the overall vision for Fabric at your organization. The value propositions we work towards, and the success criteria the project and platform will be evaluated against.



OUR OPERATING MODEL

The Playbook holds our definitions on Infrastructure, Architecture and Processes, and works as a frame of reference for future project work on Fabric.



OUR PROJECT ROADMAP

The Playbook includes our Fabric roadmap, showing estimated timelines for implementation as well as interdependencies between activities.

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Below the Iceberg

Considerations and deliveries for enabling a data driven organization

Data Consumers
People in different departments consuming data through PBI Applications, Excel, Databases etc.

Data Insight Creators
People who use raw or curated data to produce data products used by the Data Consumers

Governance
Designing and enforcing the right setup that makes the maintenance and operation of a data platform manageable

Monitoring & Cost
The ability to monitor the entire data platform in respect to data movement, integration, data protection, consumers usage, artifact creation etc., and in the context of cost.

Data Platform Architecture
Designing a Data Platform architecture and is aligned with the governance model, while still being flexible enough for the organisation, while support good developer practices

Business Intelligence
Everything related to data transformation and data modelling design. Important to be in control of data transformation and provide the correct level of transparency and flexibility to future changes and added features

Data Catalogue, DLP, GDPR etc.
Ensuring that data is discoverable, tagged and easy to find, while applying policies for sensitivity, data loss protection and GDPR.

Data- & Access Rights
Designing a data & access right setup, that support easy and transparent onboarding, yet controllable

Data Platform Integrations
How to integrate to data sources, and being in control of credentials, speed and technical preferences

Cloud Infrastructure & Security
A data platform should live within a cloud infrastructure and inherit the security rules and policies as the rest of the cloud infrastructure

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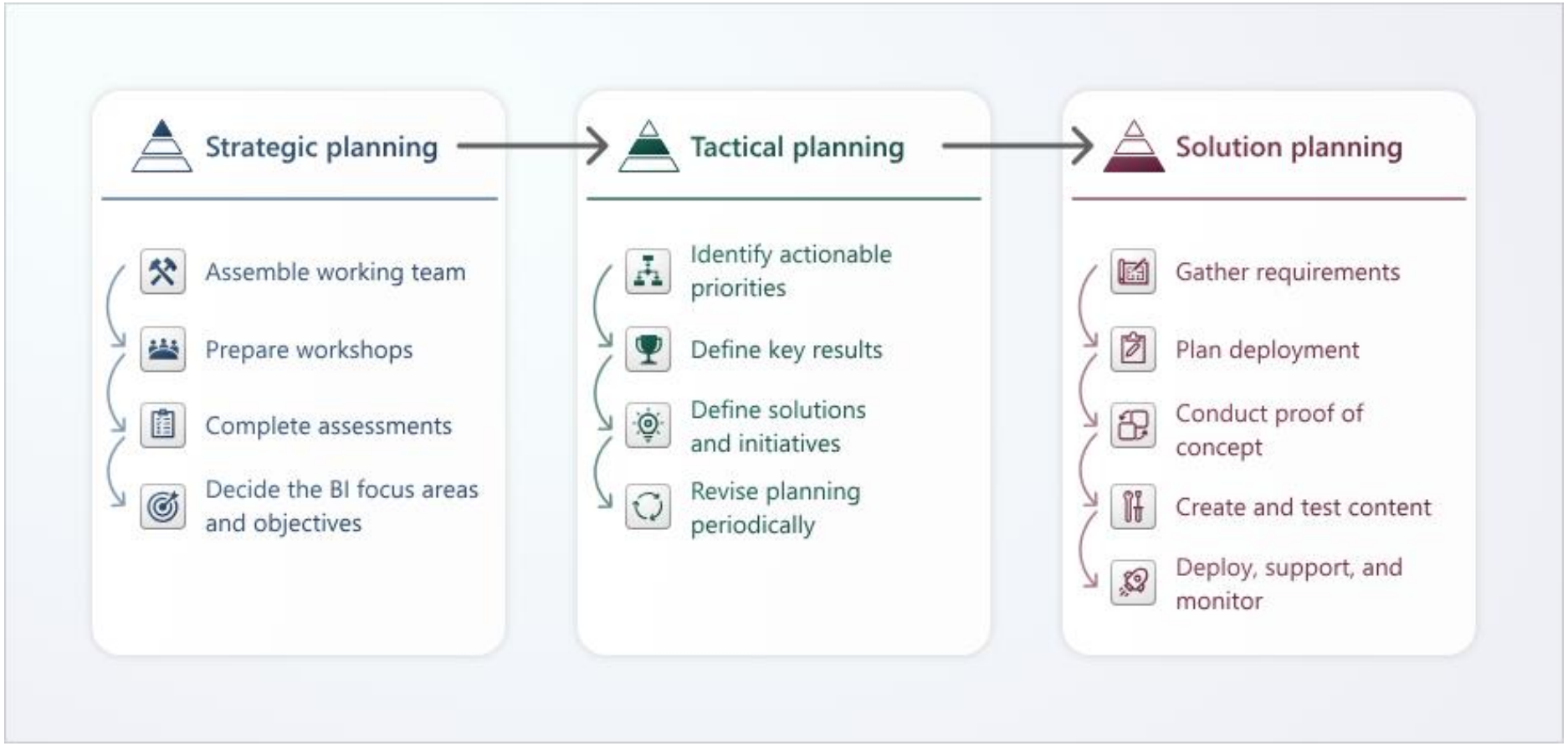
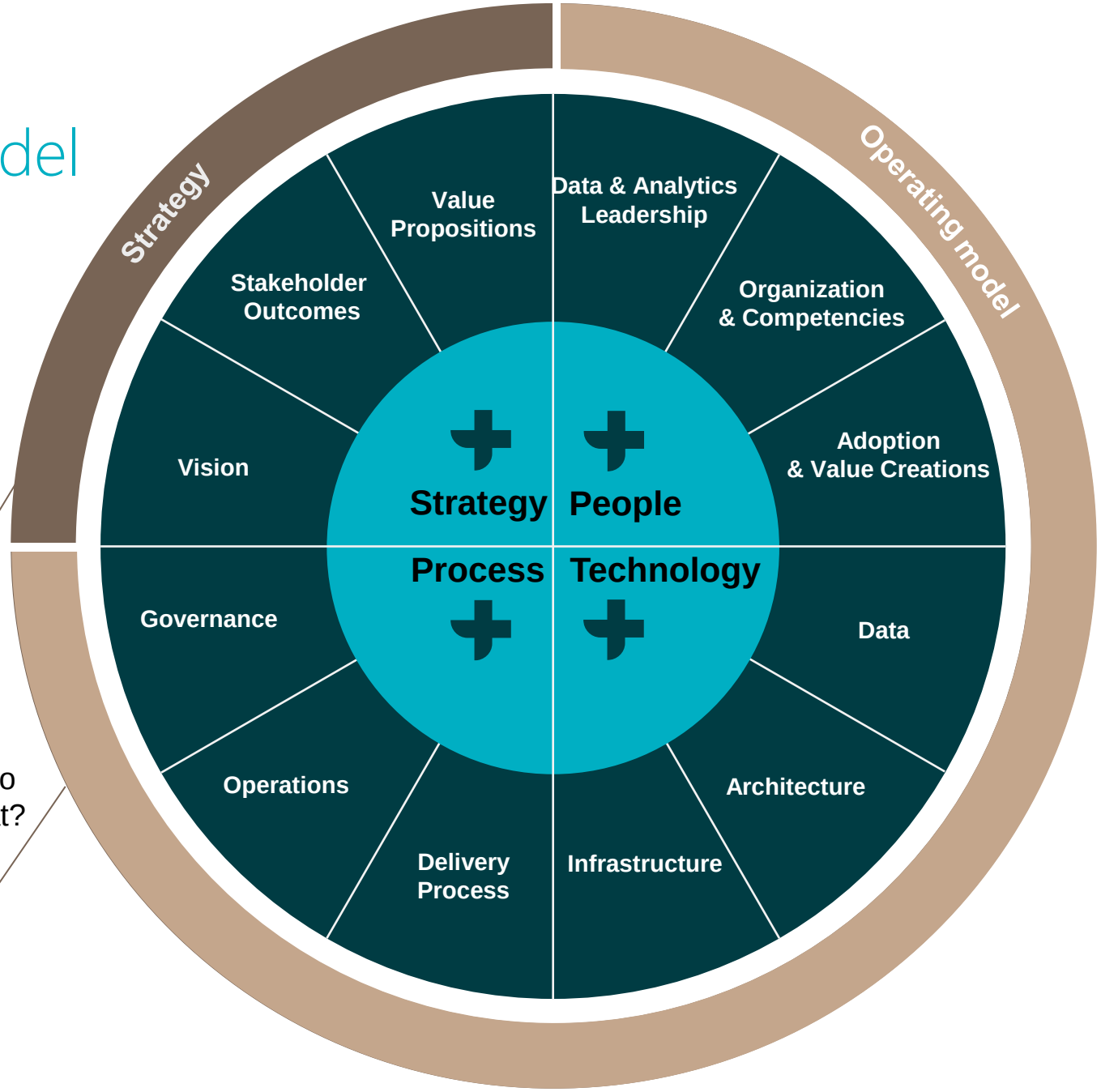
Fabric Playbook
Borrowing from Microsoft's own "Fabric Implementation Planning Guidelines"



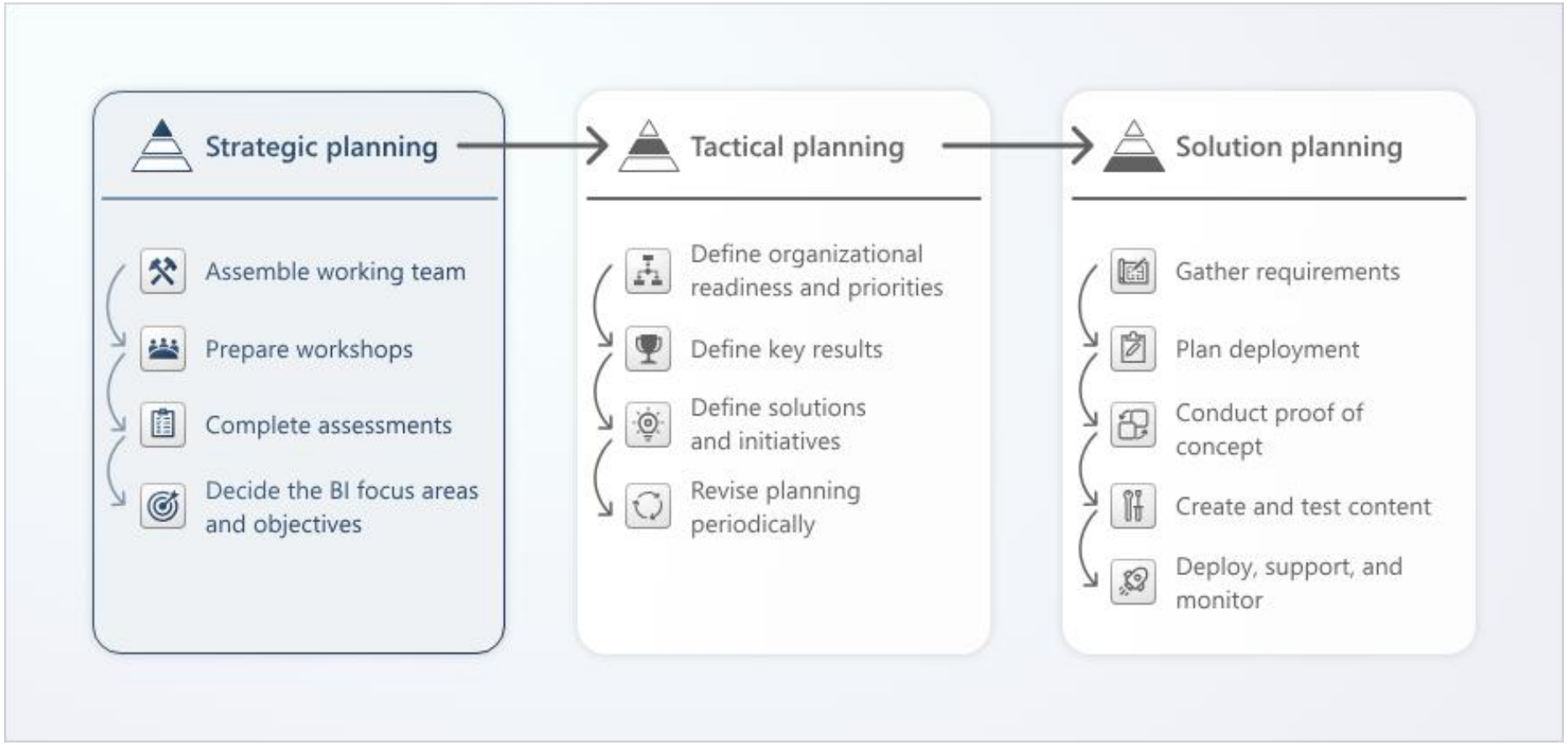
Fabric Playbook:
Data Strategy & Operating Model

Strategy:
Why are we doing this & how will we succeed?

Operating Model:
How are we going to execute & with what?



Fabric Playbook
Strategic Planning



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Fabric Playbook
Operating Model

PEOPLE

Vision

- What is our vision?
- What value will we create?
- Which success criteria are needed?
- Which enablers is the foundation?

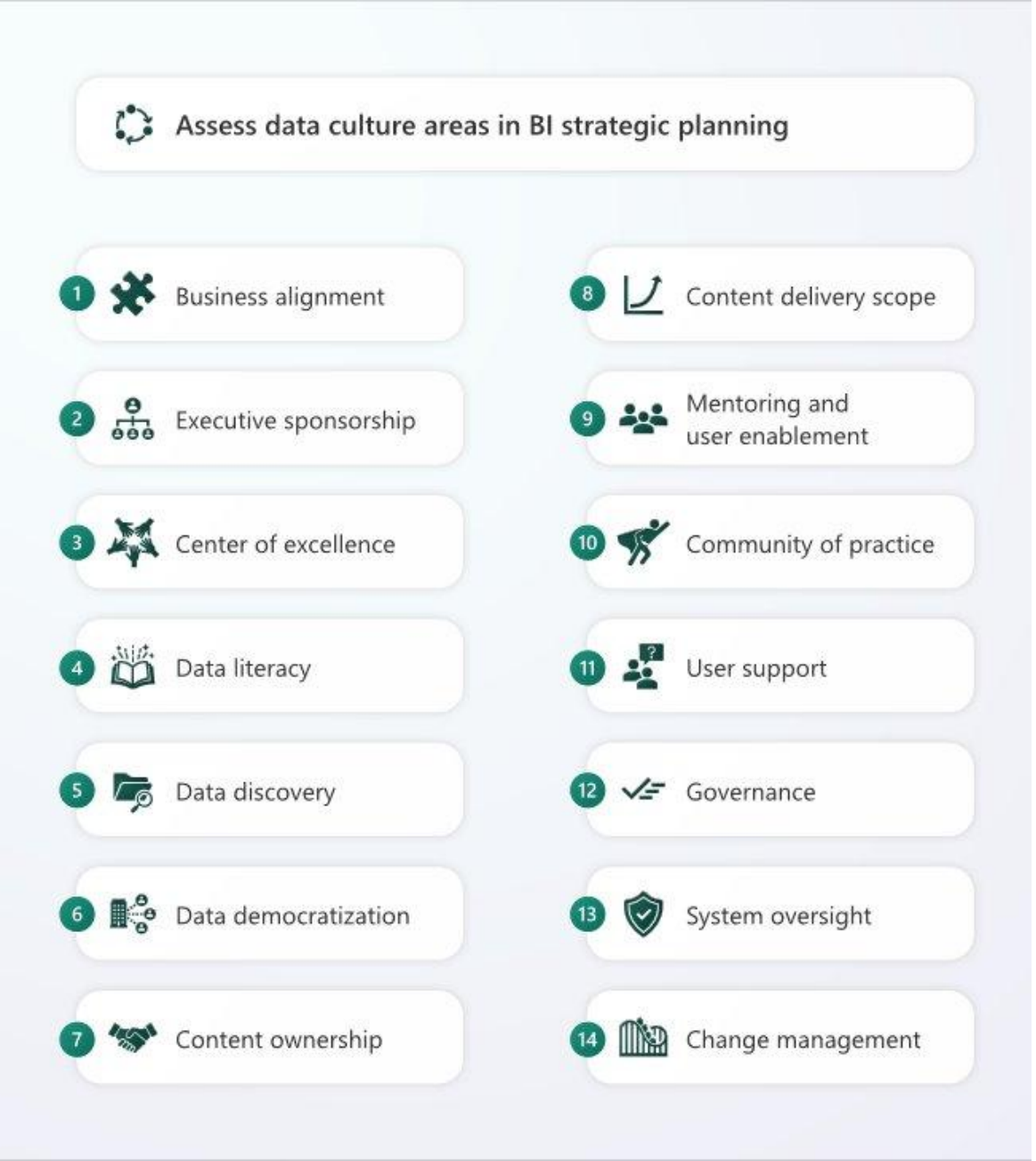
Design Principles

- How do we align our expectations?
- Which guardrails in place for decisions going forward?
- How centralized or de-centralized is our decision mandate?

Value Propositions

- How do we support the strategic Value Propositions?
- What part of our business are we to tap into?
- What happens if we do nothing?

Fabric Playbook
Cultural Assessment



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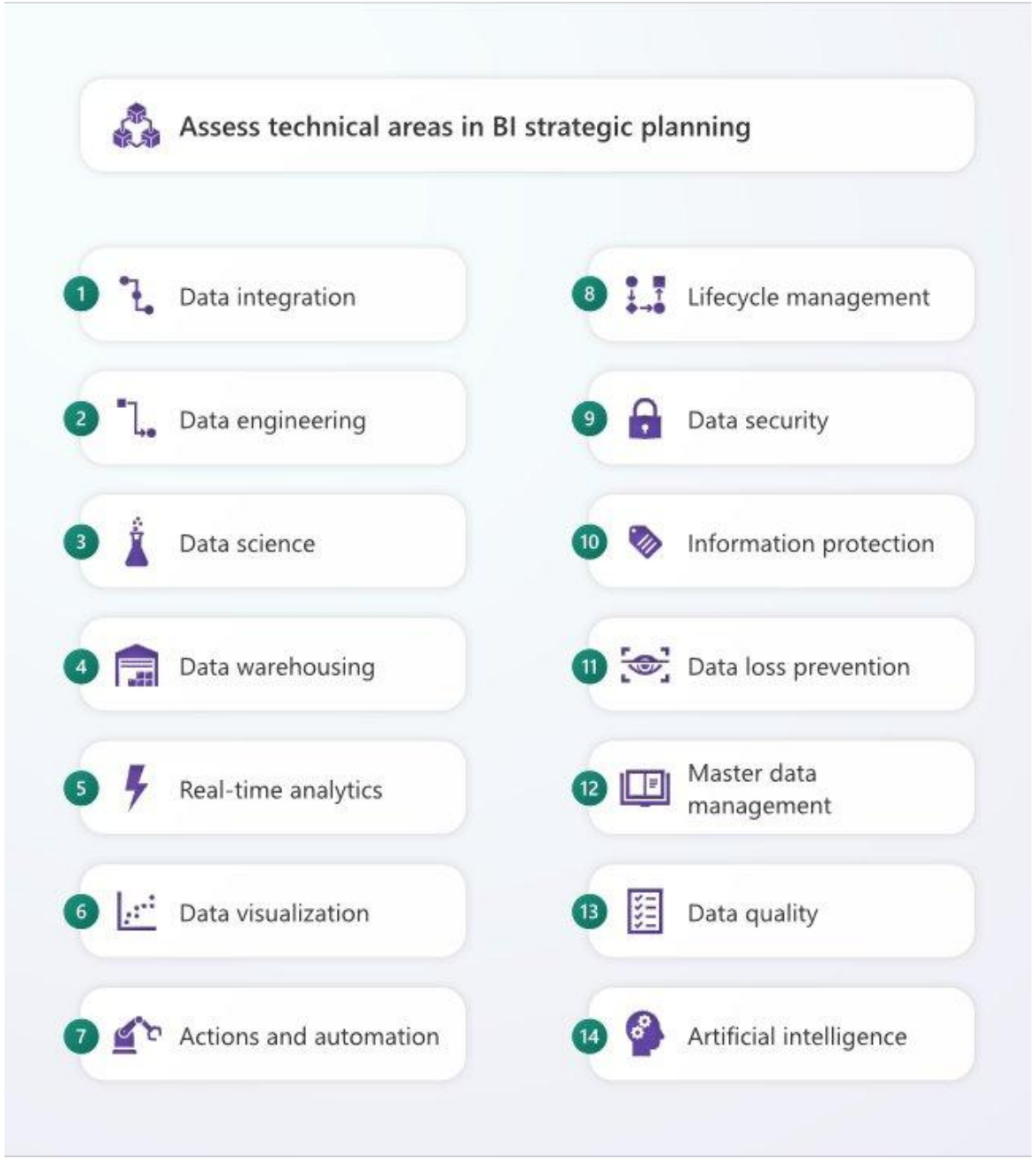
Fabric Playbook
Technical Assessment



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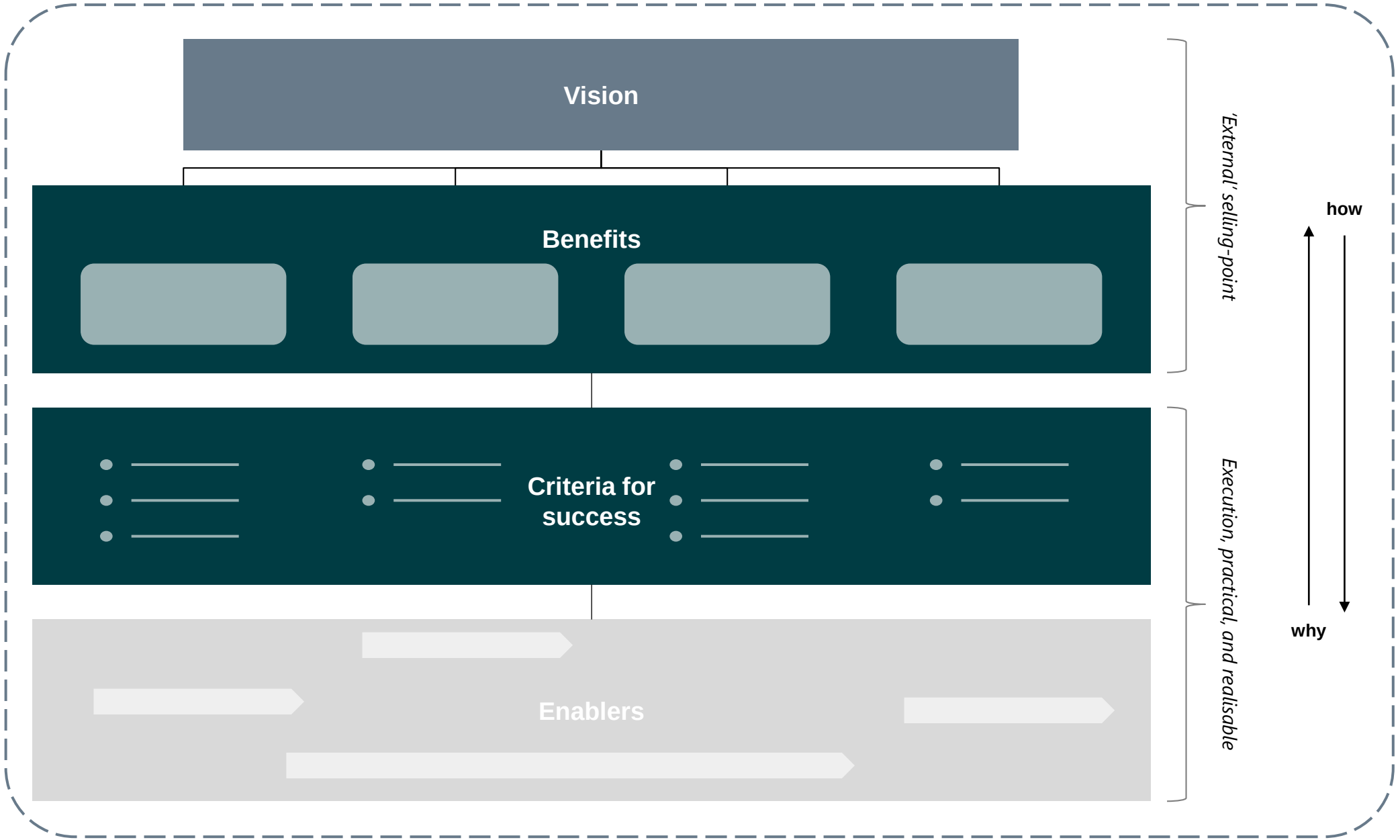
Fabric Strategy | Framework

The 'north star'.
Where are we going? A one-liner to set direction

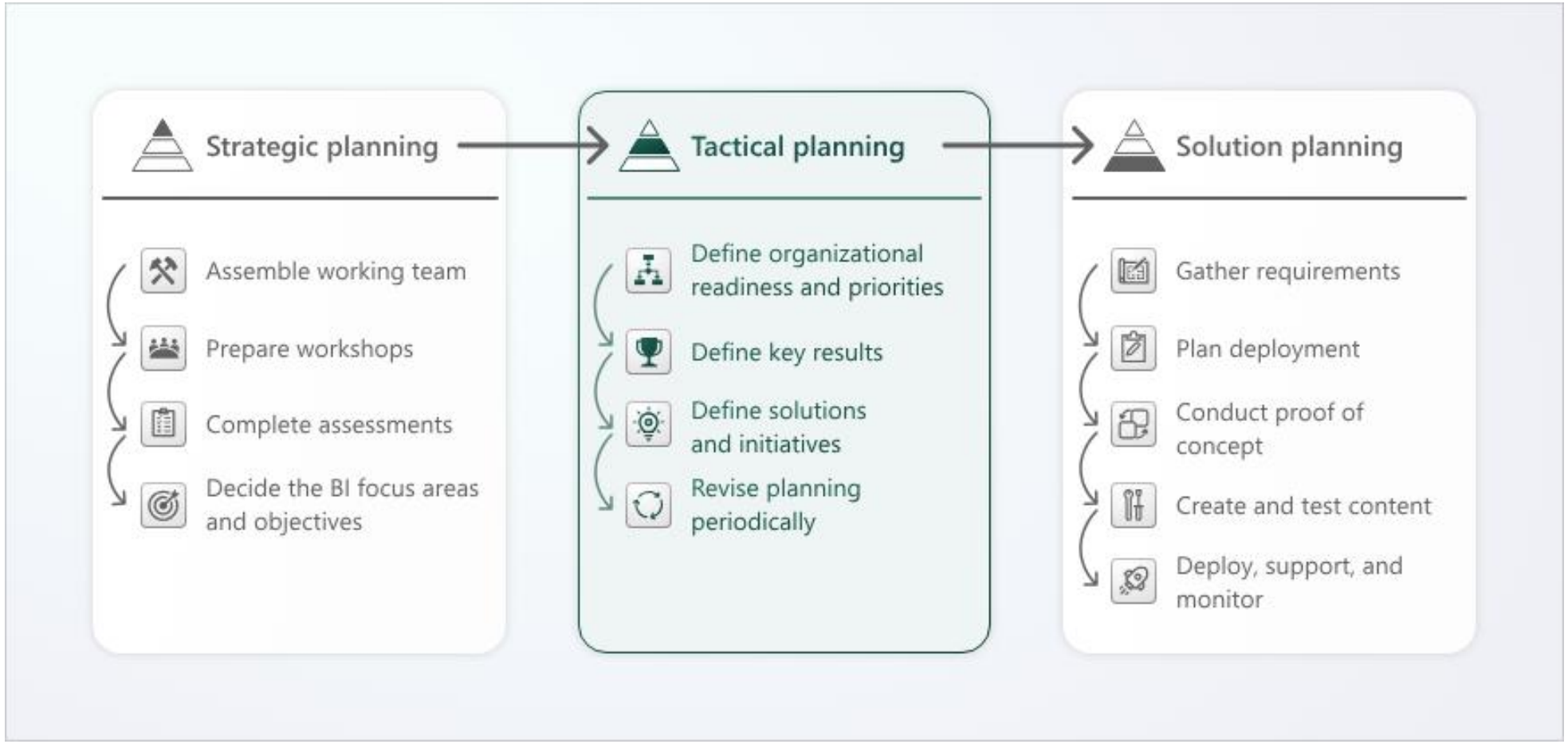
What benefits will this strategy help us achieve?
Ideally 3-5 areas.

What needs to be in order for us to achieve the benefits?
Ideally 2-3 criteria per benefit. Remember the strategy circle.

How will we execute on success criteria? Both technical and operational initiatives. Can be cross-going.



Fabric Playbook
Tactical Planning: Your Operating Model & Roadmap



Fabric Playbook
Operating Model

PEOPLE

Ownership

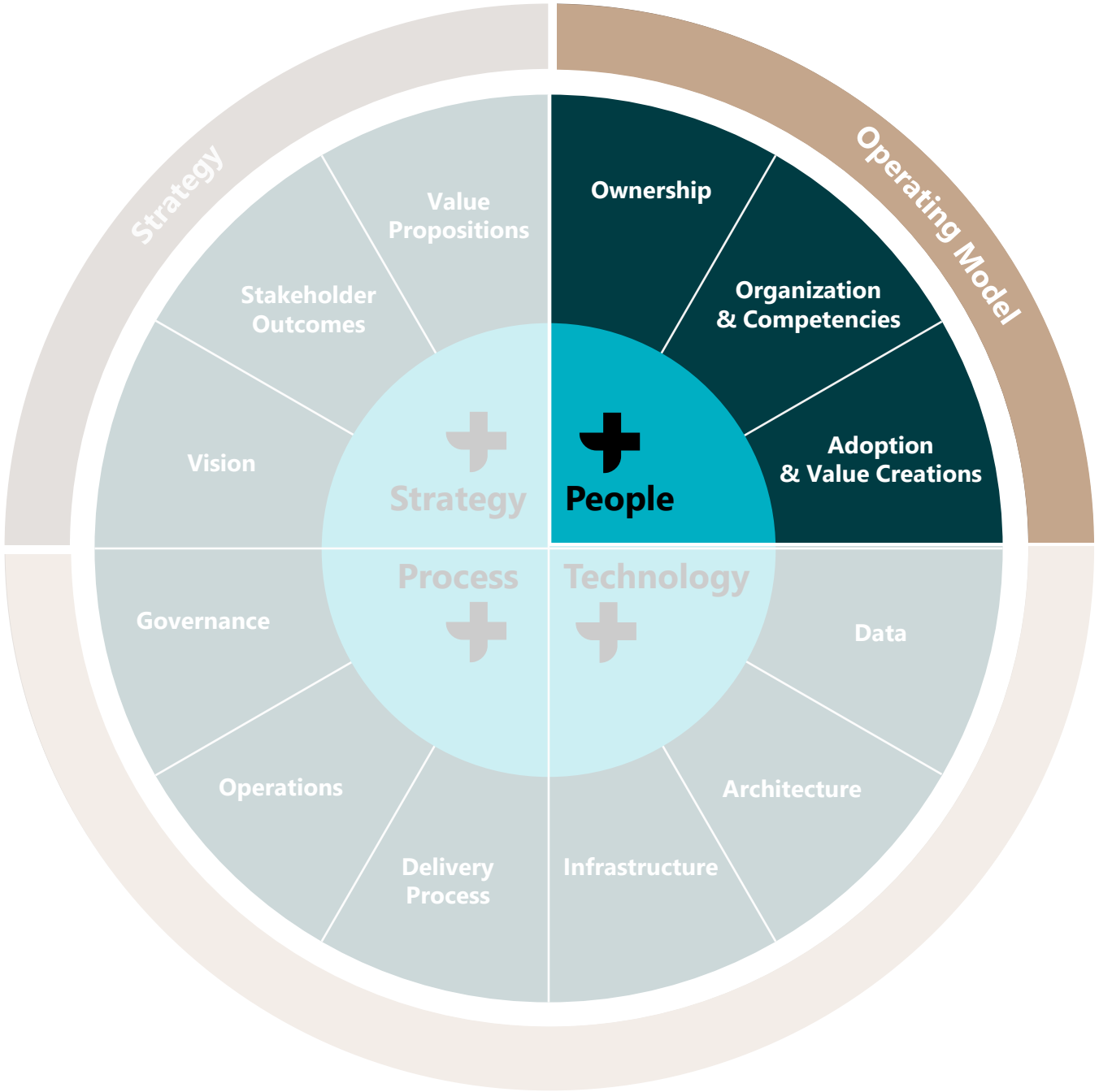
- Who owns platform / data / solutions?
- Who owns the operating model?
- How do we manage our efforts?

Organization & Competencies

- How do we organize around our efforts?
- How do we split our efforts between central and decentral functions?
- Which roles and competencies are needed centrally/de-centrally?
- Which competencies should the different roles have?
- How do we ensure that they are enabled?

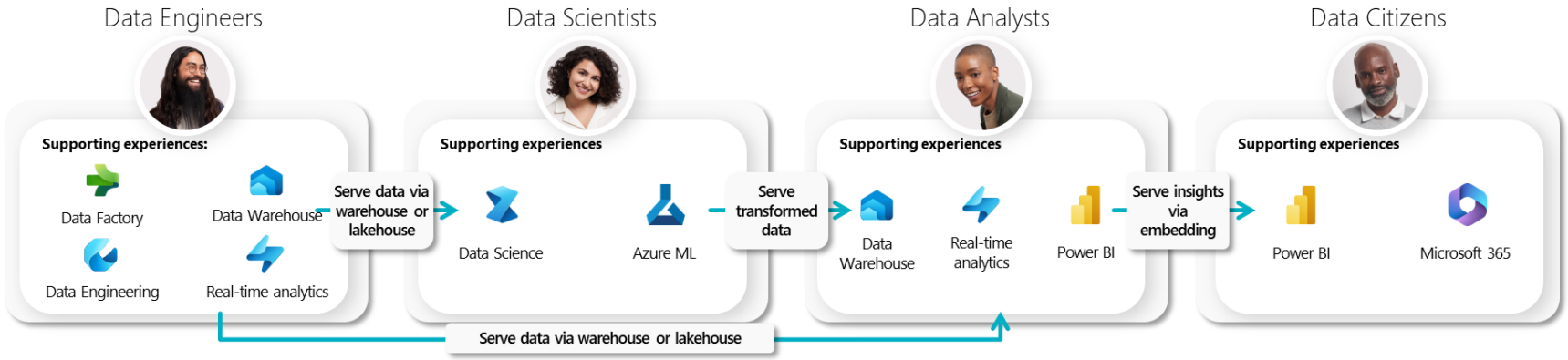
Adoption & Value Creation

- How do we support the strategic Value Propositions?
- What part of our business are we to tap into?
- What happens if we do nothing?



Fabric Playbook: People

Who interacts with the platform, how, and with which responsibilities?



OneLake

One data lake for the entire organization
One copy of data for use with multiple analytical engines

Data Stewards

- **Maintain visibility and control of costs** with a unified consumption and cost model that provides evergreen spend optics on your end-to-end data estate
- **Gain full visibility and governance** over your entire analytics estate from data sources and connections to your data lake, to users and their insights

- Pro-developers benefit from its scalability, integration with coding tools, and advanced data processing capabilities
- Business analysts and citizen developers can leverage low-code/no-code tools like Power BI and Dataflows to create insights from data without needing extensive technical skills

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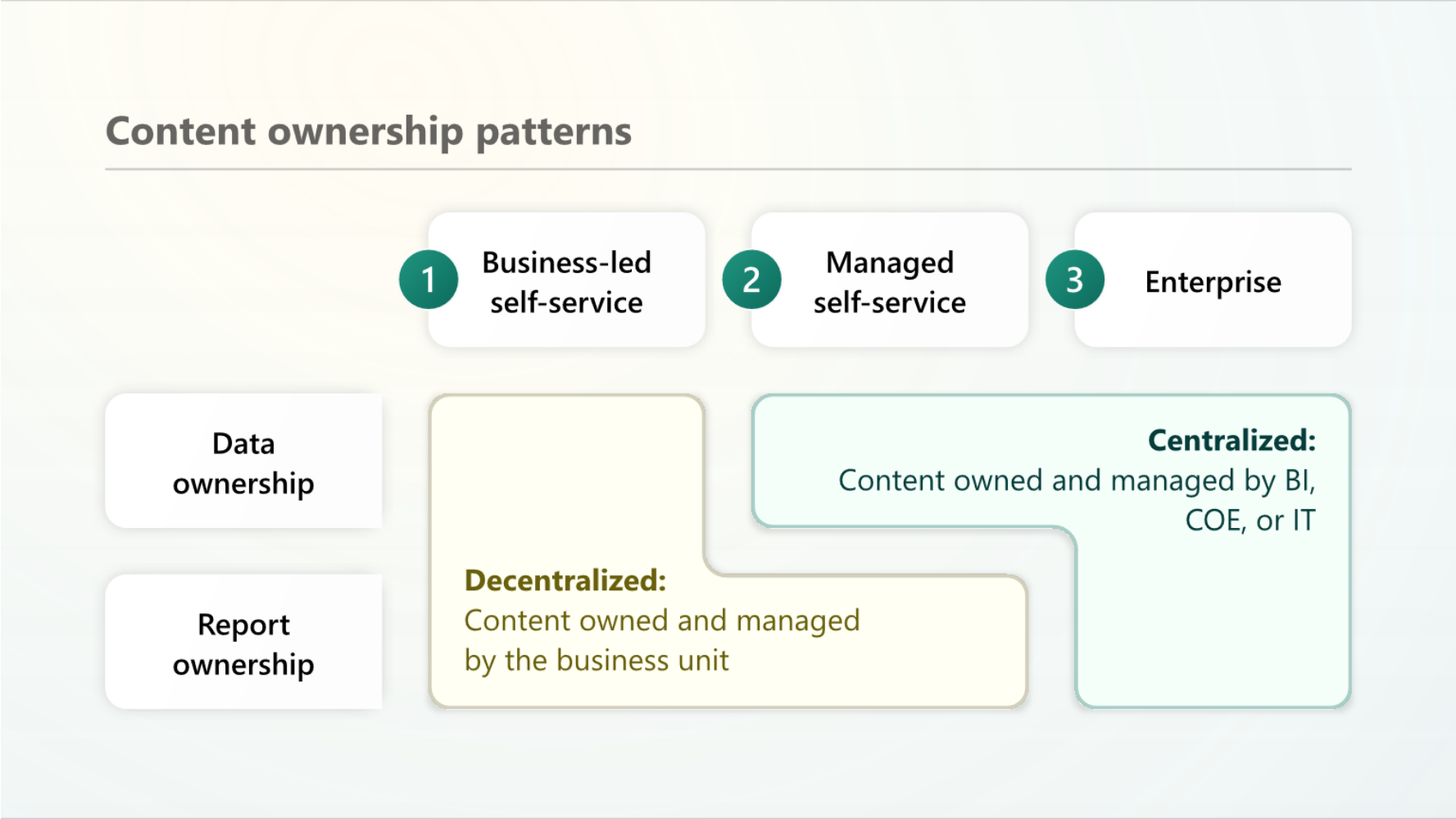
Fabric Playbook: People
How is Content Owned and Managed on the platform?



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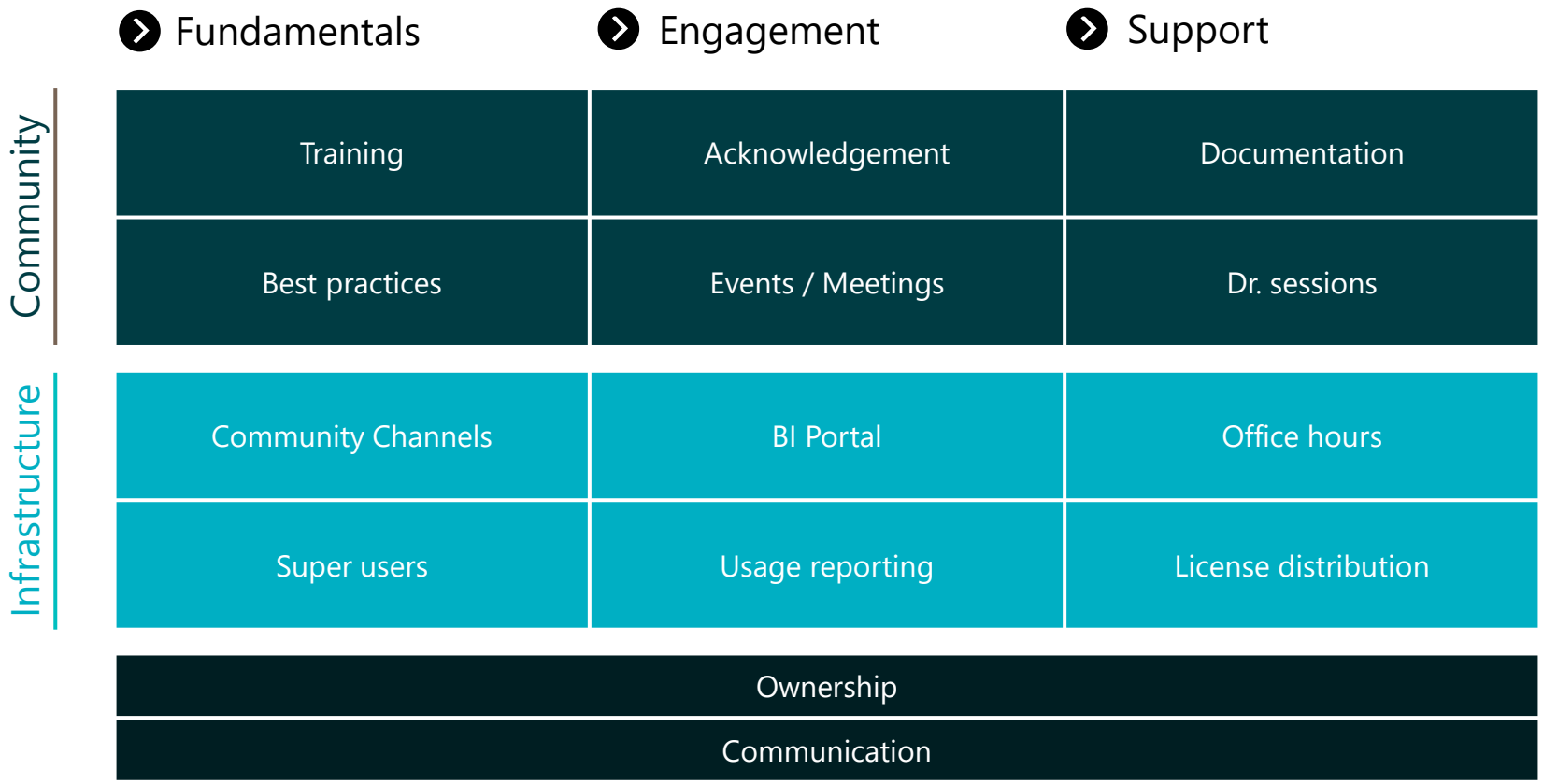
Fabric Playbook: People
How do we anchor and adopt the platform in the business?



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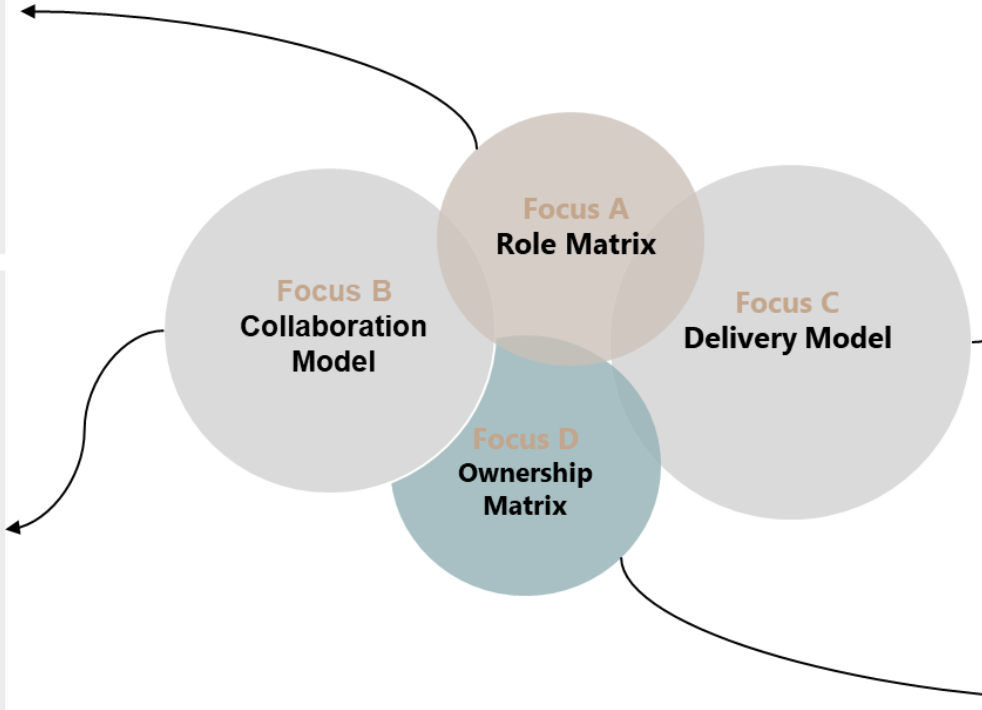
Fabric Playbook: People
People Outputs

Focus A
Role Matrix

Our matrix of roles and their necessary competencies and responsibilities is a tool to understand the different roles' adoption and potential needs, as well as their differences in authority, expectations, and focus.

Focus B
Collaboration Model

Our collaboration mode outlines the overall interfaces between the areas of responsibility involved when we are to provide and manage our data solutions. Here, a distinction is often made at a minimum between the distribution of responsibilities among colleagues from "the business" and/or "decentralized developers," and "IT" or "the central BI team."



Focus C
Delivery Model

Our delivery model outlines the overall phases and milestones that we go through when providing and managing our data solutions. Such a model typically illustrates the transition from qualifying a request to design and development, and then to operation and subsequently decommissioning. Our delivery model can have several different versions, where one version reflects the approach for, for example, a specific type of solution.

Focus D
Ownership Matrix

Our ownership matrix outlines the overall distribution of responsibility for the quality of our data solutions throughout the entire lifecycle of the solution.

Fabric Playbook
Operating Model

PEOPLE

Ownership

- Who owns platform / data / solutions?
- Who owns the operating model?
- How do we manage our efforts?

Organization & Competencies

- How do we organize around our efforts?
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Adoption & Value Creation

- How do we support the strategic Value Propositions?
- What part of our business are we to tap into?
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Fabric Playbook
Operating Model

TECHNOLOGY

Data

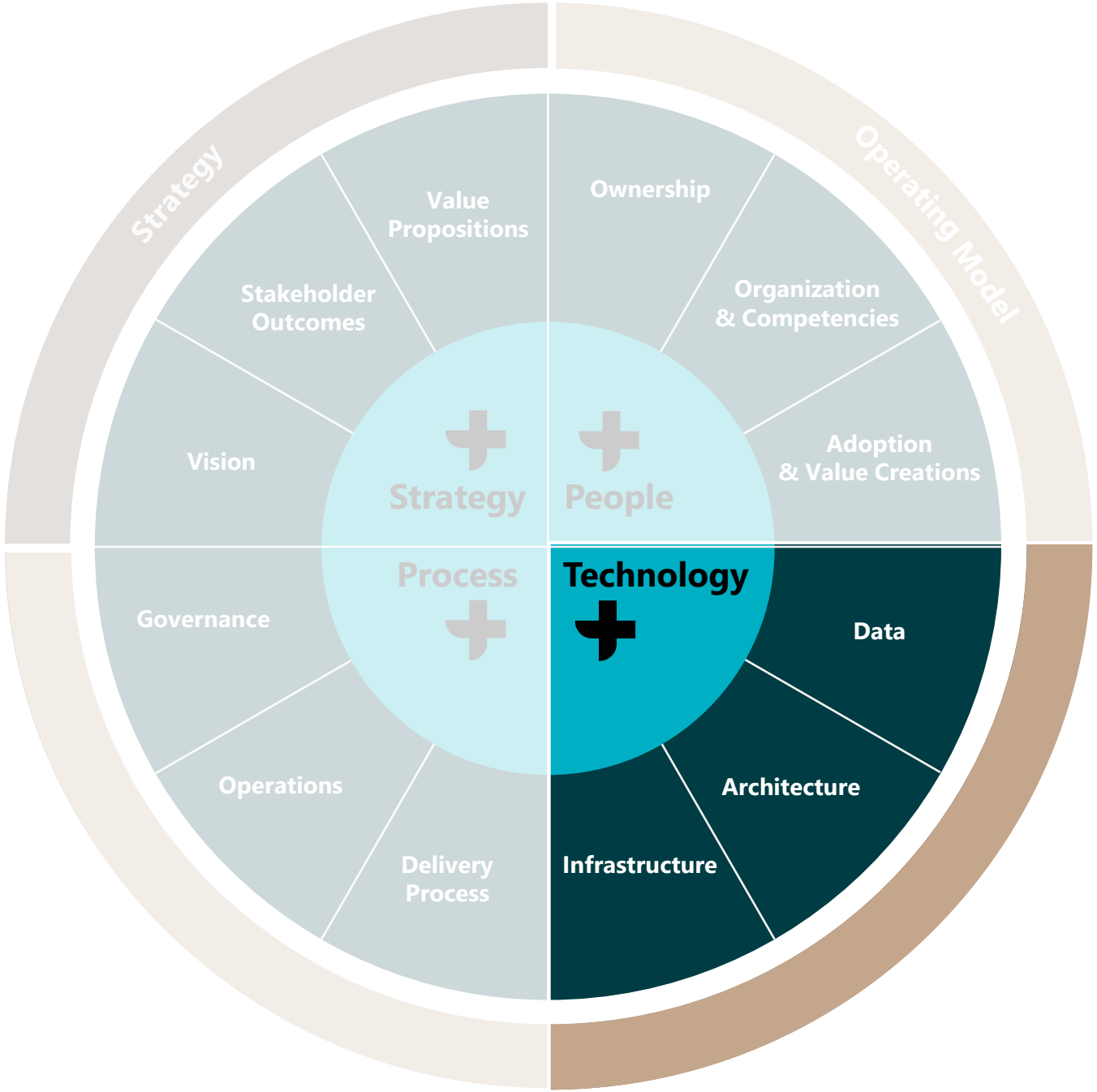
- Which data sources do we use?
- With which frequency do we require data, and how do we update it?
- How is data going to be made available to the different stakeholders?
- Who owns the data?

Architecture

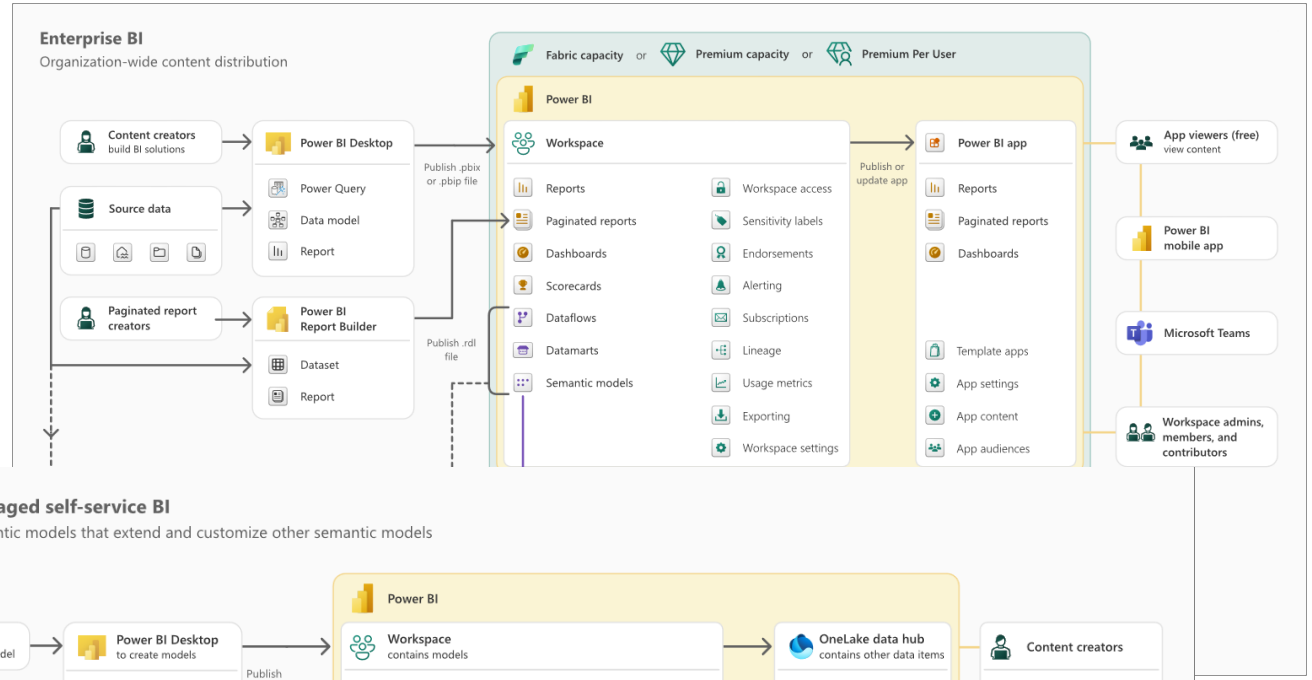
- Which workspace / domain architecture do we need?
- Who is responsible for content?
- How does the architecture fit with out collaboration model?
- What are our development principles?

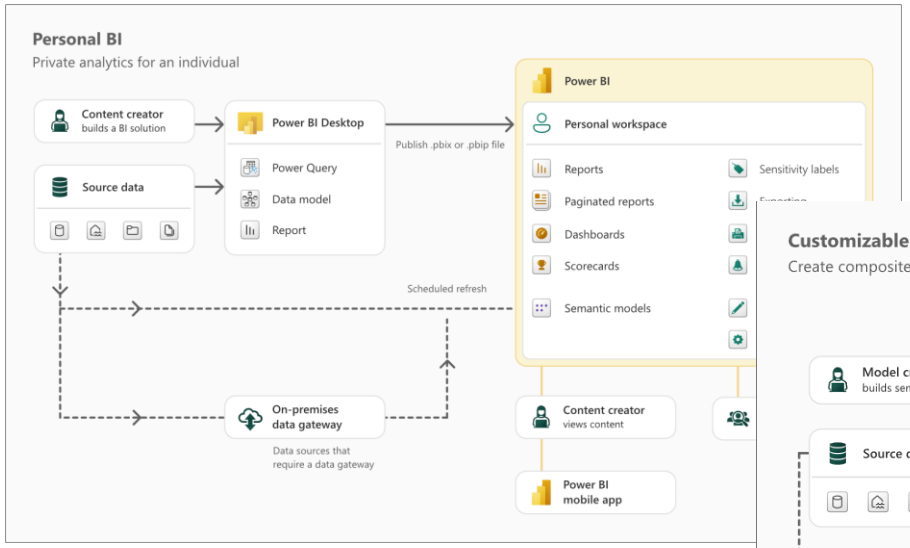
Infrastructure

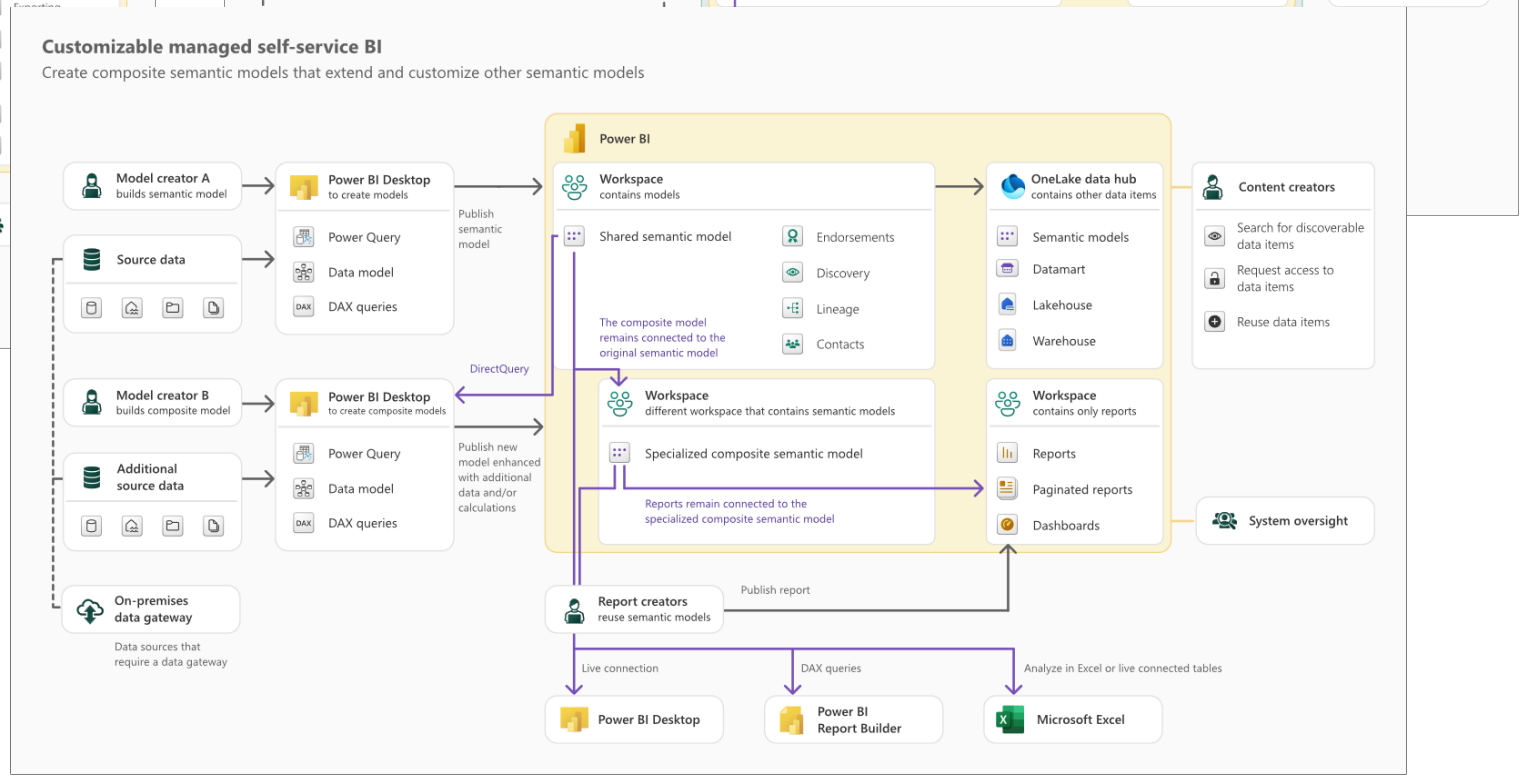
- Which environments are desired?
- Which capacities are needed?
- How is deployment going to be sustained?
- How is testing going to be handled?



Fabric Playbook: Technology Development Strategy







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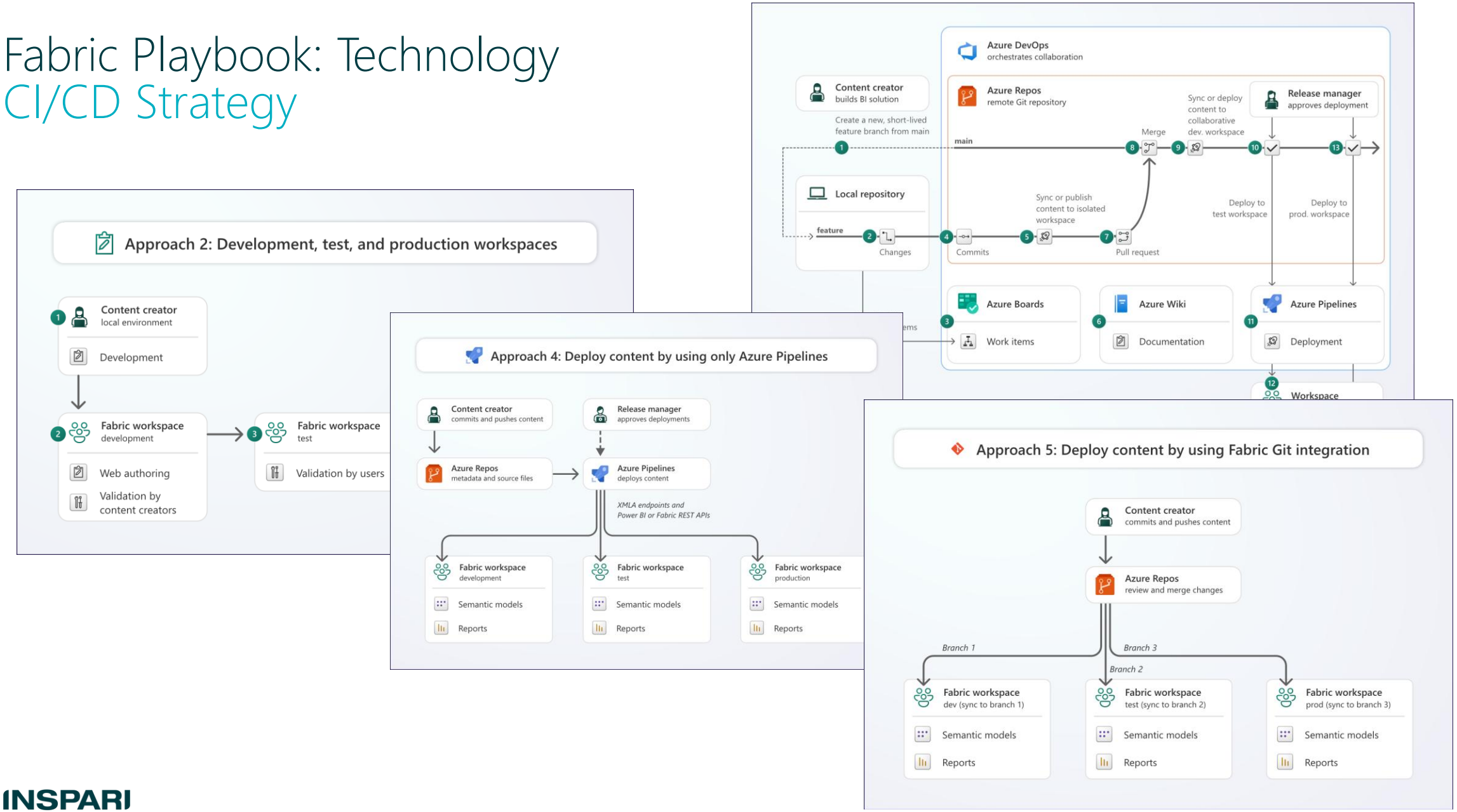
Fabric Playbook: Technology
CI/CD Strategy



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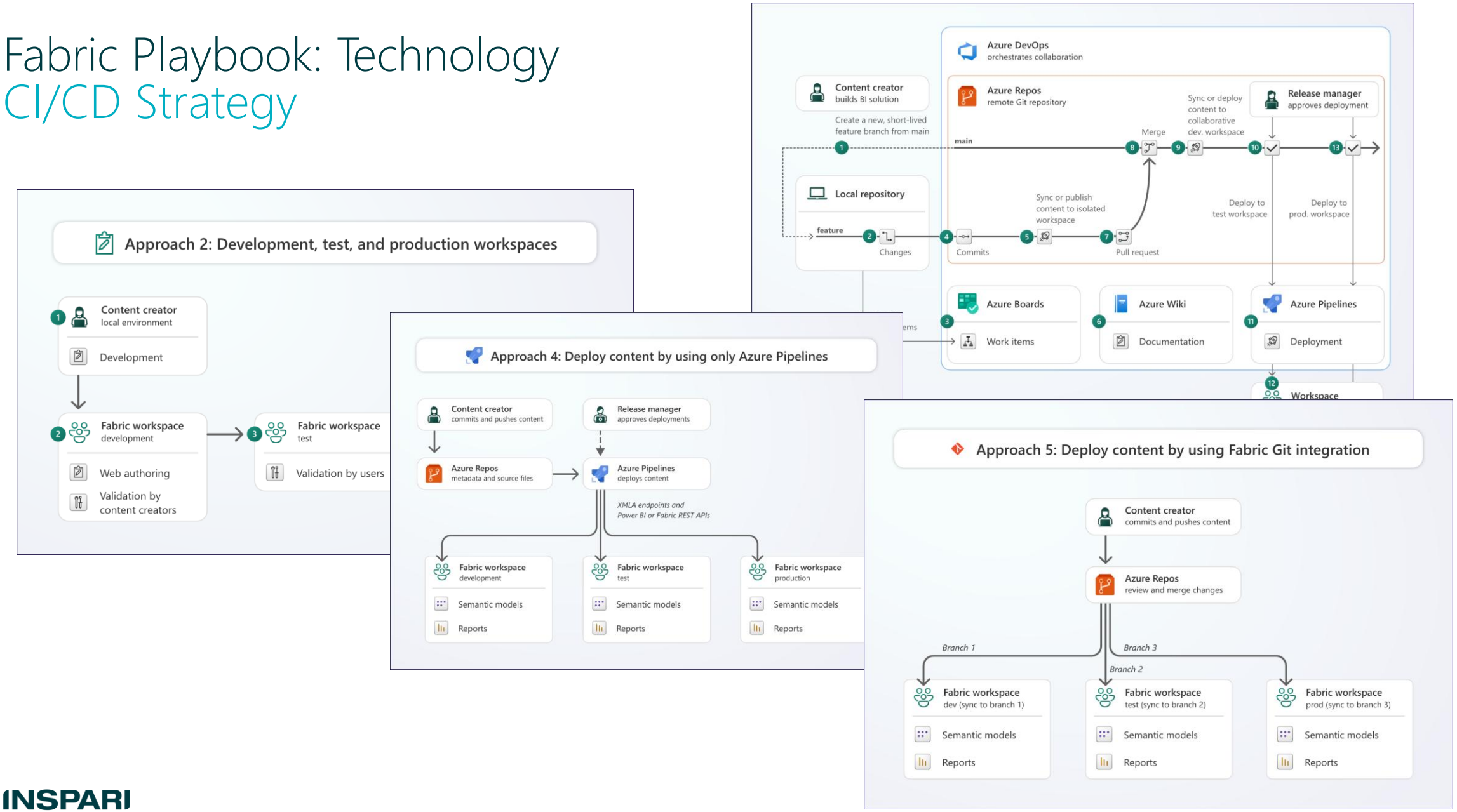
Fabric Playbook: Technology
CI/CD Strategy



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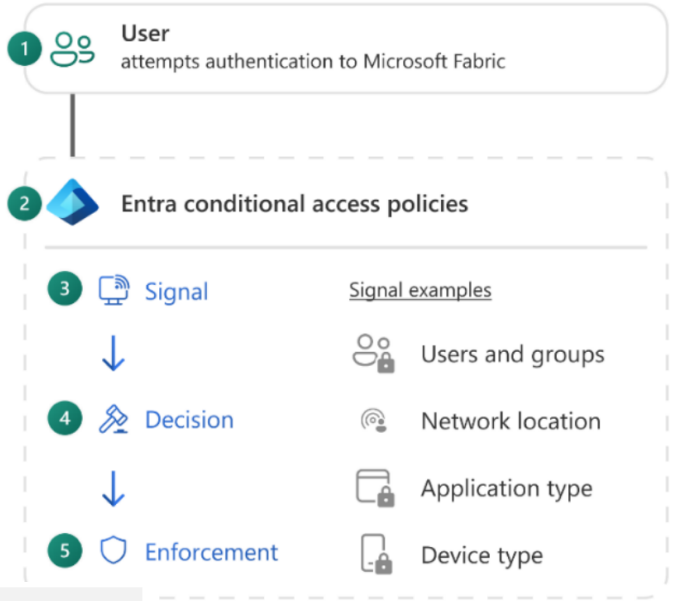
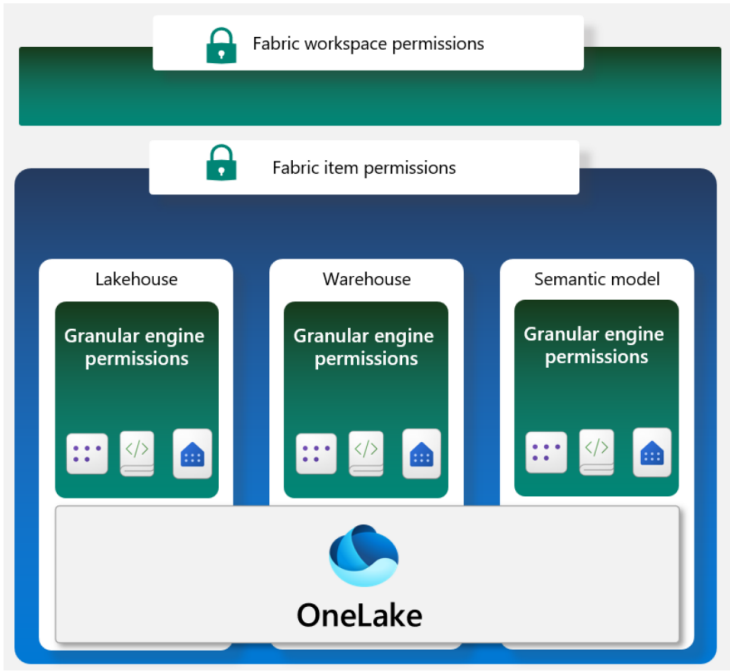
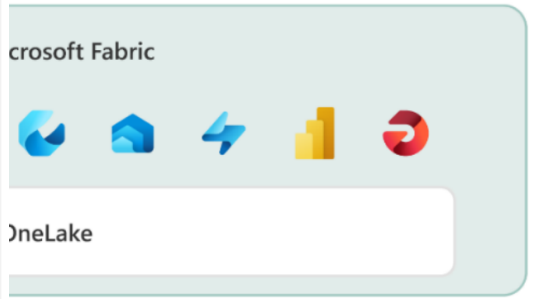
Fabric Playbook: Technology
Security Assessment







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Fabric Playbook: Technology
Detailed Architecture & Infrastructure Discussions for As-Is & To-Be

Layer	Landing	Raw	Standardized	Curated	Modelled
Purpose	For data sources pushing data	For data sources where data is pulled	Enriched data set	Consolidated data model	Data ready for consumption
Required	Only when data is pushed	Always	Always	When needed	When needed
Naming	Source-aligned	Source-aligned	Source-aligned	Business-aligned	Business-aligned
Storage entity	Source object	Source object	Source object	Consolidated business entity	Consolidated business entity
File type	Any, but Parquet if from database	Any, but Parquet if from database	Changes: Parquet Current: Delta	Changes: Parquet Current: Delta	Delta
Data mutability	Immutable	Immutable	Changes: Immutable Current: Mutable	Changes: Immutable Current: Mutable	Depends on requirements
Data operation	Append	Append	Changes: Append Current: Merge	Changes: Append Current: Merge	Depends on requirements
Data retention	Temporary	Depends on requirements	Forever	Forever	Depends on requirements
Data life-cycle mgmt.	N/A	Apply life-cycle mgmt.	Apply life-cycle mgmt.	Apply life-cycle mgmt.	Depends on requirements
Data granularity	As received	As received	Lowest grain	Lowest grain	Aggregated if needed
Data access	No access	No access	Limited access	Available as per permissions	Available as per permissions
Data access type	N/A	N/A	Through shortcuts	Through shortcuts	Through shortcuts or SQL Endpoint
Data logic	None	None	Standardizes dates and empty fields, applies data quality rules, deduplicates. Add simple static columns, e.g. enum-values or simple rule based information	Join relevant data together, conforms to business entities	Modelled as needed, e.g. as dimensions and facts, including surrogate keys

Topic: Data Source & Data Integration (from source to Data Platform)

AS-IS	TO-BE

• Current Data Sources
  ○ Technology (SQL Server, REST, Graph, FTP, on-premsis, cloud etc.)
  ○ Integration security
  ○ Integration Type (Batch vs. Near-Real-time vs. Real-time)
  ○ Handling of Schema changes?
  ○ Environments for "source" data
  ○ Performance (limited access, speed etc.)
• Integration Tools and Frameworks (current tool, preferred tools, mandatory tools?)
• Data Integration overview
• Data Integration access & rights management (key vault, who has access, expiring credentials etc.)
• Data pushed to platform (technically how? Limitations within platform or vendor?)
 	
Data sources are connected to via APIs and structured databases.
"Streaming" today, e.g. Datascope is just frequent batches.
No data sources "pushing" data in today.
Data contracts exist (in word), but are used only as baseline. Changes are only documented in DevOps wiki articles. It is a word file today, so that it can be shared.
Very frequent Schema Changes today – Adding new columns – Process is to update data contract, create task, make code change during sprint, perform testing and release etc...
Currently dependencies result in performance issues.
And also some performance issues from just suboptimal code.	

Fabric Playbook
Operating Model

TECHNOLOGY

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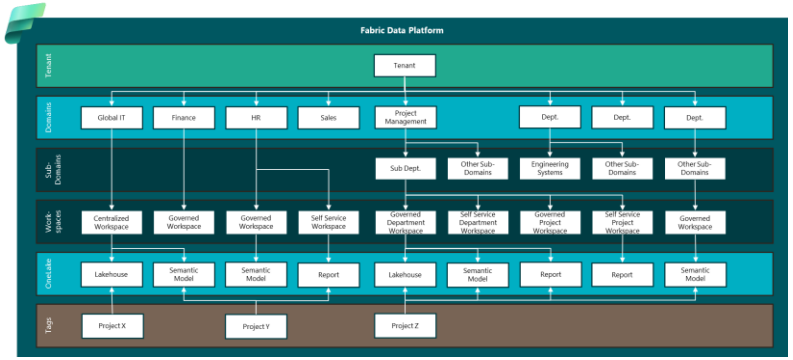
Infrastructure

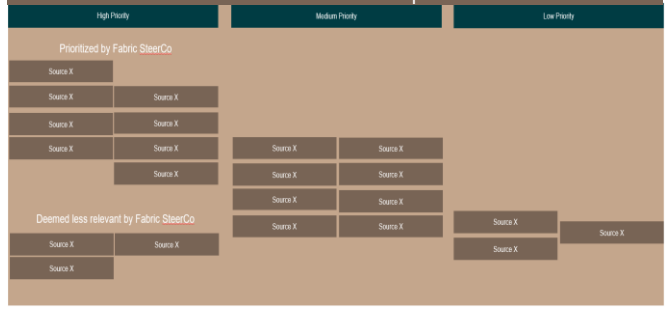
- Which environments are desired?
- Which capacities are needed?
- How is deployment going to be sustained?
- How is testing going to be handled?

Workspace and Domain Structure

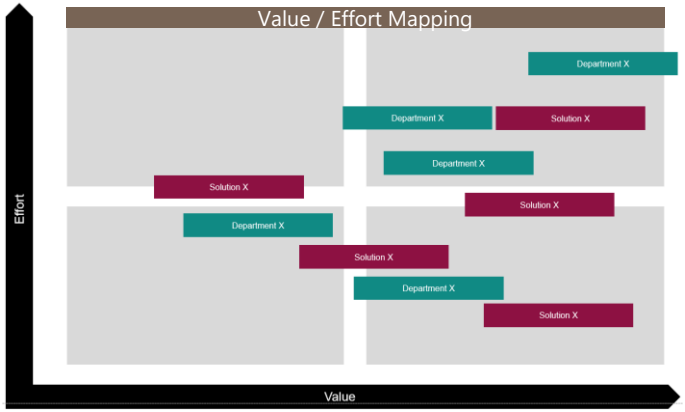
Fabric Playbook: Technology
Domain & Workspace Architecture



Data Source identification & prioritization

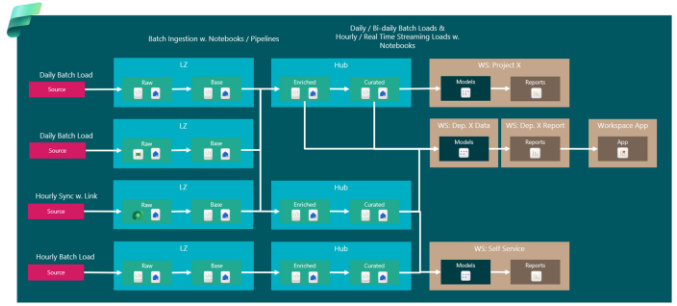


Value / Effort Mapping

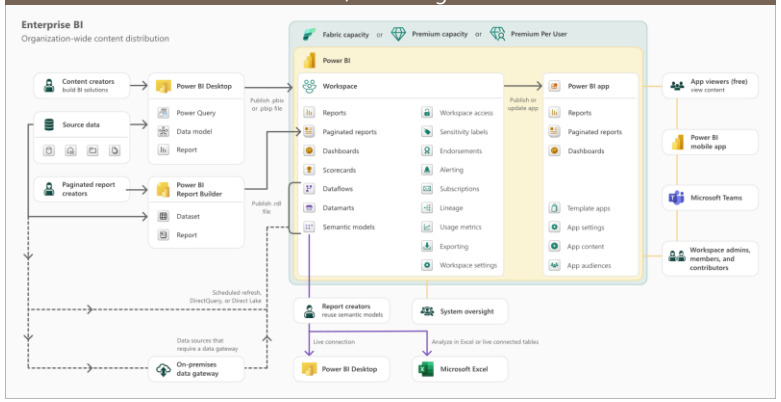


Architecture

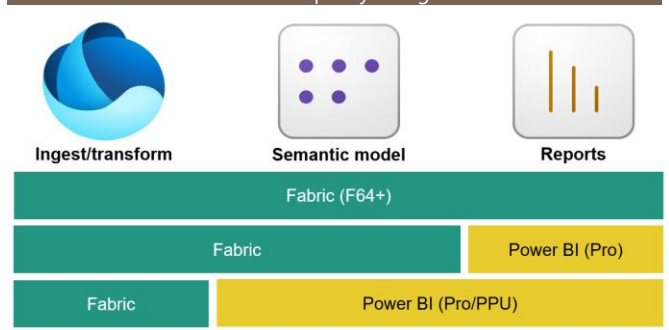
Fabric Playbook: Technology
Combined Conceptual Data & Workspace Architecture



CI / CD Design



Fabric Capacity Design



Fabric Playbook
Operating Model

PROCESS

Governance

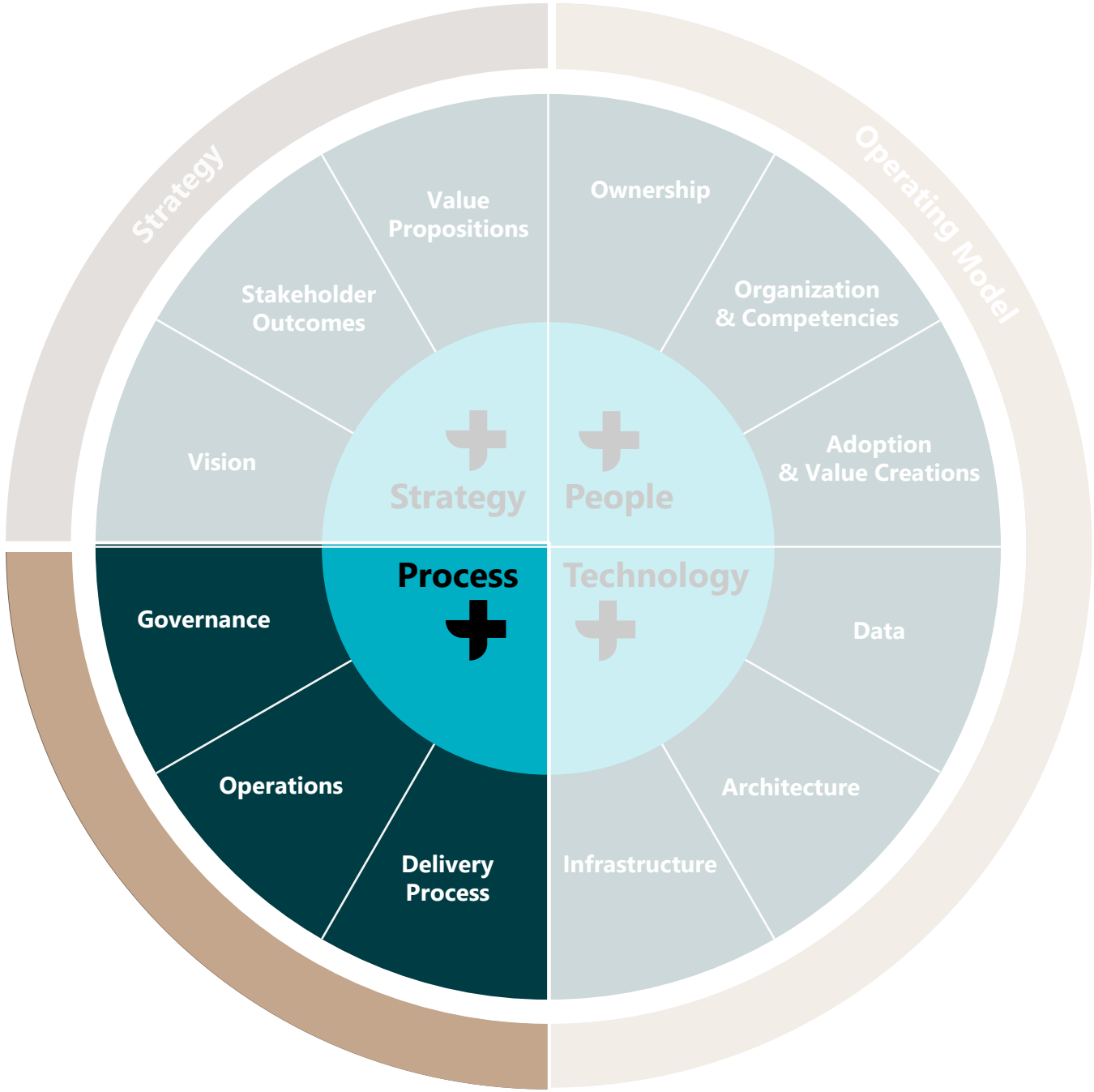
- Which roles and competencies in relation to governance have been defined / identified and status on implementation?
- Which governance processes are identified / defined and status on implementation?
- How do we define ownership of the different data?

Delivery Process

- Which delivery processes have been defined / identified and status on implementation?
- With which model / project approach do we perform projects?
- What does our development process look like?

Operations

- Which operational / maintenance processes have been identified / defined and status of implementation?
- How do we want to ensure surveillance and "housekeeping"?



Fabric Playbook: Process
Process Flow Definitions

Process	Comment
Self Service Processes	User wants to ingest and store their own data
	User wants to ingest and model their own raw data
	User wants to build their own report
	User wants to build their own AI/ML/Data Science artifacts
	User wants to combine centralized data with their own data
Centralized Processes	User wants new data source ingested centrally
	User wants a new centralized model created
	User wants a new report created
	User wants to add a column to an existing model/report
	User wants to add a new metric/measure/kpi to an existing model/report
	User wants to combine two existing models into a new one
	User wants a bug in a model/report fixed
Access Processes	User wants to access data from a semantic model
	User wants to access data from a report
	User wants to access centralized data via Power BI
	User wants to access centralized data via Excel
	User wants to access centralized data via other tools than Power BI and Excel
	User wants access to report
	User wants access to data model
	User wants access to data in a Lakehouse
	User wants access to a workspace
Admin Processes	User wants a new workspace created
	User wants to reassign workspace capacity
	New centralized release

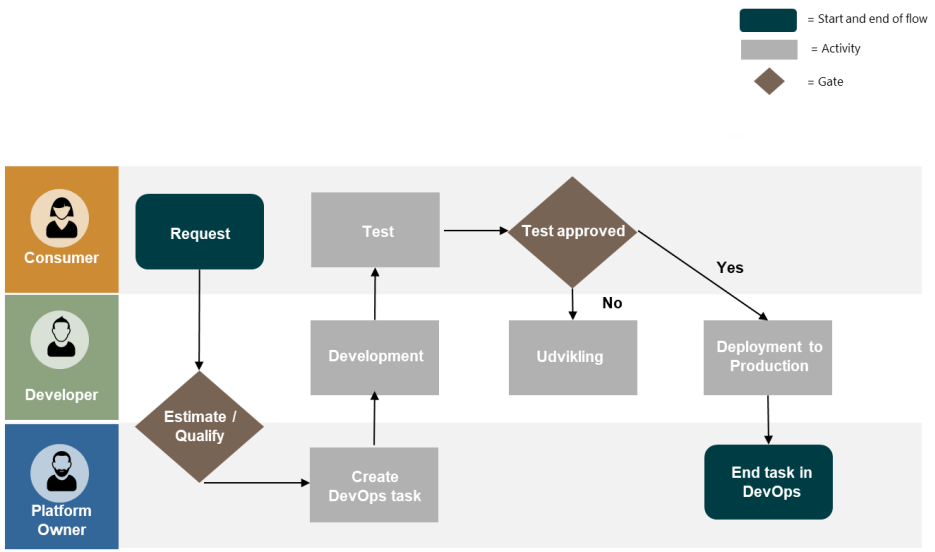
A **Consumer** requests a new data source to be centrally ingested on behalf of a department.

The Source is submitted as project via the **Platform Owner**, who qualifies and estimates task together with a **Centralized Developer**.

The **Developer** does all development, and validates the result together with the **Consumer**.

When solution is ready, the **Developer** deploys to Production, and informs the **Platform Owner**, and closes the task.

The **Consumer** starts using the solution in production.



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Fabric Playbook: Process
Central Delivery Model

Fabric Playbook: Process
Delivery Model

	Request Initiation	Refinement	Prioritization	Development / Test	Release
Activity	• For smaller requests, Engineers record basic requirements themselves. • For larger requests, requester must fill out Request Form, and supply required information. Engineers receive form output in shared mailbox.	• Breakdown of Feature/User Story into smaller tasks. • Gathering of additional required information to qualify tasks.	• Requests are prioritized by Scrum Master / Engineers / Analysts during Sprint Planning. • Creation of Data / Report Delivery Specification Documents.	• Engineers develop feature and create pull request. • Review of Pull Request and Deployment to test. • Creation & completion of Test Plans	• When tests have passed, a new release to production is done. • Documentation is created and stored incl. DDS / RSS. • Finally, DevOps is updated and Requesters informed.
Delivery	Engineers register a Feature/User Story in Azure Dev Ops with all relevant information about request.	Engineers / Scrum Master breakdown and enrich tasks in Azure Dev Ops Backlog.	Tasks are moved from Backlog to active Sprint. Data & Report Specification Documents (DDS & RSS) are created.	Engineers create Pull Request. Requester creates Test Plans in Dev Ops. Tester complete tests and sign off in DDS/RSS	Engineers complete DevOps Tasks. Engineers create and store documentation.
People	Backend Engineers Frontend Developers	Backend Engineers Scrum Master Platform Manager	Backend Engineers Scrum Master Platform Manager	Backend Engineers Platform Manager Frontend Developers	Backend Engineers Frontend Developers

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Fabric Playbook: Process
Governance Frameworks

Fabric Playbook: Process
Governance: Endorsement Checklists for Models

Checklist Guidelines

- Run through all Checklist Items, marking whether a test fails or succeeds.
- All Checks of Severity 3 and 2 must pass for an item to become Certified.
- All Checks of Severity 2 must pass for an item to become Promoted.
- All Checks of Severity 1 are suggested.
- If an item fails a test, the developer is actively involved to try and solve issues.
- Checklists may be expanded in the future.

Category	Checklist	Severity
Power Query	Queries are folding (unless otherwise explained in documentation)	3
	Transformations applied could not have been pushed further upstream	3
	Unnecessary columns and rows are removed	2
	Disable Load for intermediate queries not used in final model	2
	Incremental Refresh configured (if applicable)	1
	Check for redundant steps (e.g. multiple rename steps)	1
	If using Excel Files, convert to .csv if feasible	1
Model Objects	Ensure consistent, logical object names (Tables, Fields, Measures)	2
	Measures have a meaningful description	2
	Measures are organized into Measure Tables / Display Folders	2
	Measure performance is acceptable	2
	Hide non-reporting and/or technical fields from field list	1
	Create organized Model Diagrams for larger models	1
Documentation	Power Query code is commented	2
	DAX Measures are commented	2
	Model has Documentation as a Page in the Semantic Model .pbix report, or externally in DevOps/Teams	2
Data Quality	Key Measure / KPI numbers are validated (incl. testing w. different filter combinations)	2
	Detailed numbers are validated (incl. testing w. different filter combinations from dimensions)	2
Publish to Development Workspace	Model is saved and versioned in either Teams/Sharepoint/OneDrive or GIT	2
	Model is Published to a Governed or Centralized workspace of type Development, NOT a self-service workspace	2
	Row Level Security roles tested and validated in the browser	2
Deployment	Model is associated with a Deployment Pipeline (Dev-Test-Prod for Centralized, Dev-Prod for Governed Workspaces)	3
	Deployment Pipeline runs succesfully	3
Model Refresh	Model has a Refresh Schedule	2
	Data Source Credentials are correctly configured in the service	2
	Gateways (if applicable) are correctly applied	2

Fabric Playbook
Operating Model

PROCESS

Governance

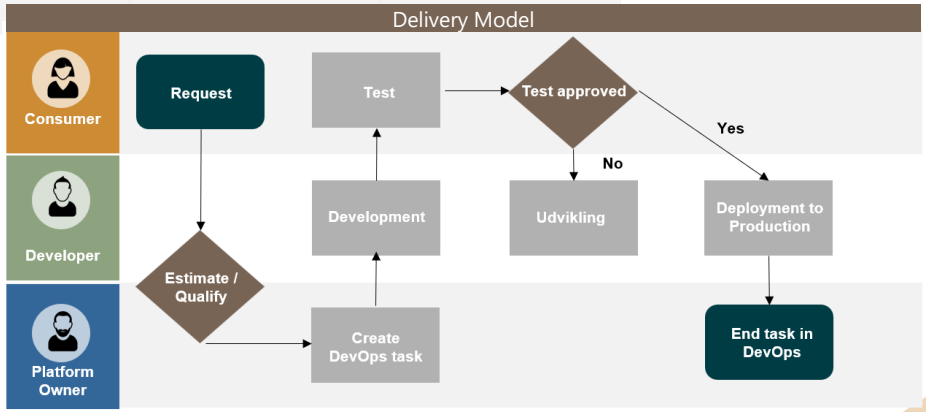
- Which roles and competencies in relation to governance have been defined / identified and status on implementation?
- Which governance processes are identified / defined and status on implementation?
- How do we define ownership of the different data?

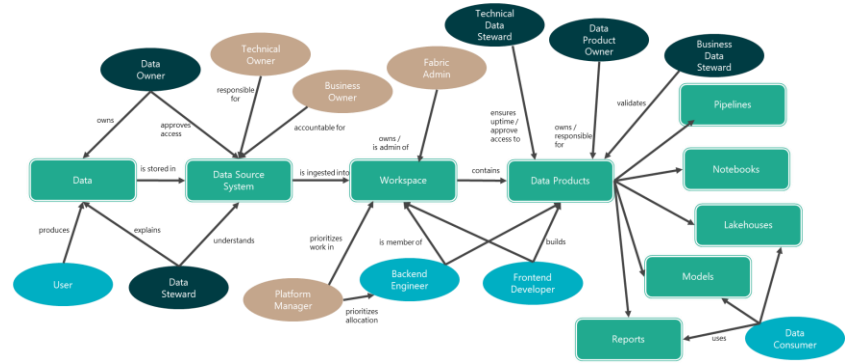
Delivery Process

- Which delivery processes have been defined / identified and status on implementation?
- With which model / project approach do we perform projects?
- What does our development process look like?

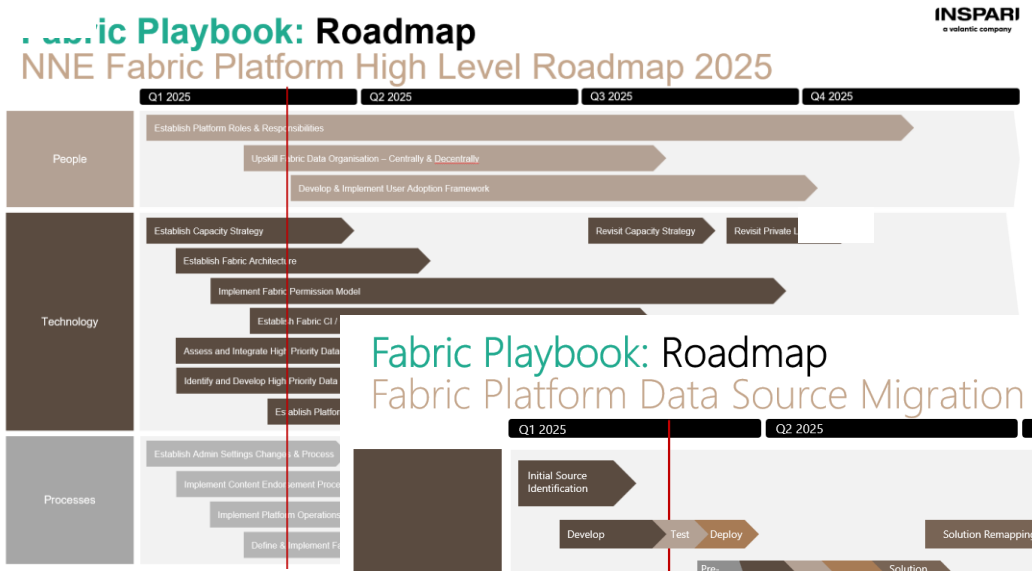
Operations

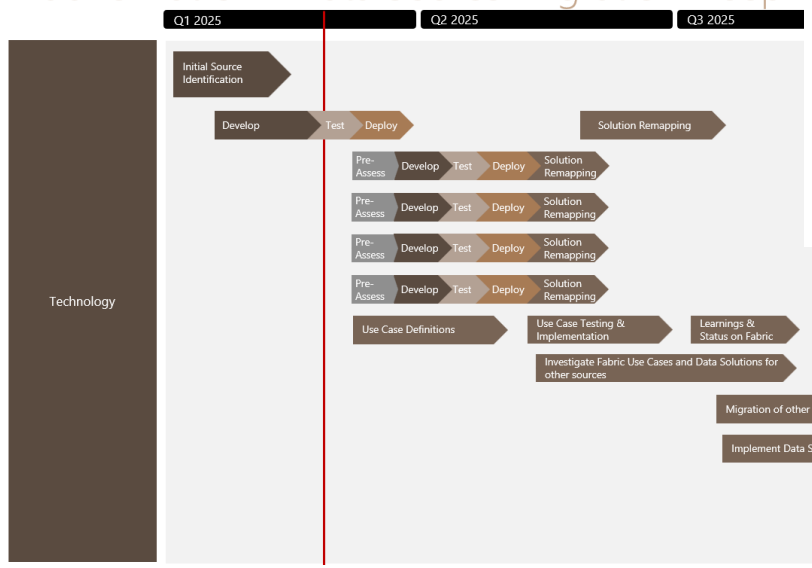
- Which operational / maintenance processes have been identified / defined and status of implementation?
- How do we want to ensure surveillance and "housekeeping"?





Roadmap Planning
Consolidating outlined initiatives





Fabric Playbook: Allocation Outline

NNE Fabric Platform Technology Roadmap 2025

Role	Allocation Hr. pr. week:	Workorders	Note
Fabric Architect Jon Vöge	24hr.	• Roles & Responsibilities • Governance • Adoption Framework • Capacity Strategy, & Permisson Models • Fabric Architecture & CI / CD Processes • Data Sources • Data Solutions • Admin & Platform processes • Platform Monitoring • Security Measures	To be replaced in October
Fabric Data Engineer #1 Anders Meged	24hr.	• Fabric Architecture & CI / CD Processes • Data Sources • Data Solutions • Platform Templates & Guidelines • Support & Internal Advisory for DataHub	
Fabric Data Engineer #2 --	37hr	• Implement Workspaces • Implement CI / CD Processes. • Data Sources • Support Data Solutions • Platform Templates & Guidelines	
Fabric Data Engineer #3 --	37hr	• CI / CD Implementation in workspaces • Data Sources • Data Solutions • Content Endorsement • Operations, Monitoring & Auditing	
PM & Project Delivery Søren	14hr	• Stand-up, Sprint planning, retro etc. • Backlog alignment & delivery controlling • Cross team coordination & SC facilitation • Ressource allocation & risk validation	
Ad-Hoc Specialists. Ex. Infrastructure, Security.etc.	4hr	• Infrastructur (Architecture and processes) • Security & compliance (Sensitivy labels)	To be involved when needed in specific cases.
Est. Pr. 6 months	**3.9 Mio.**		
DataHub Support Mahdi	37hr		

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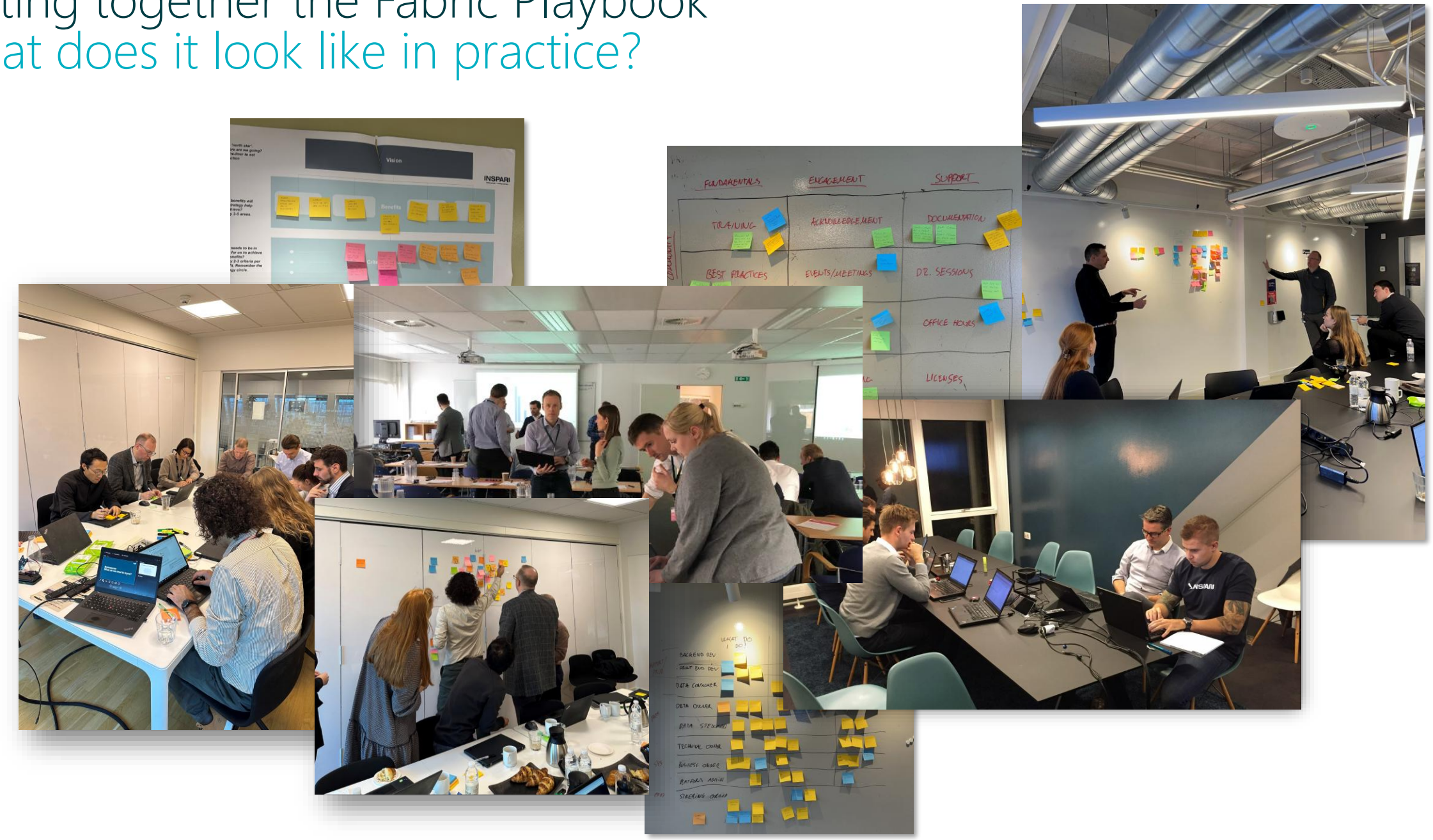
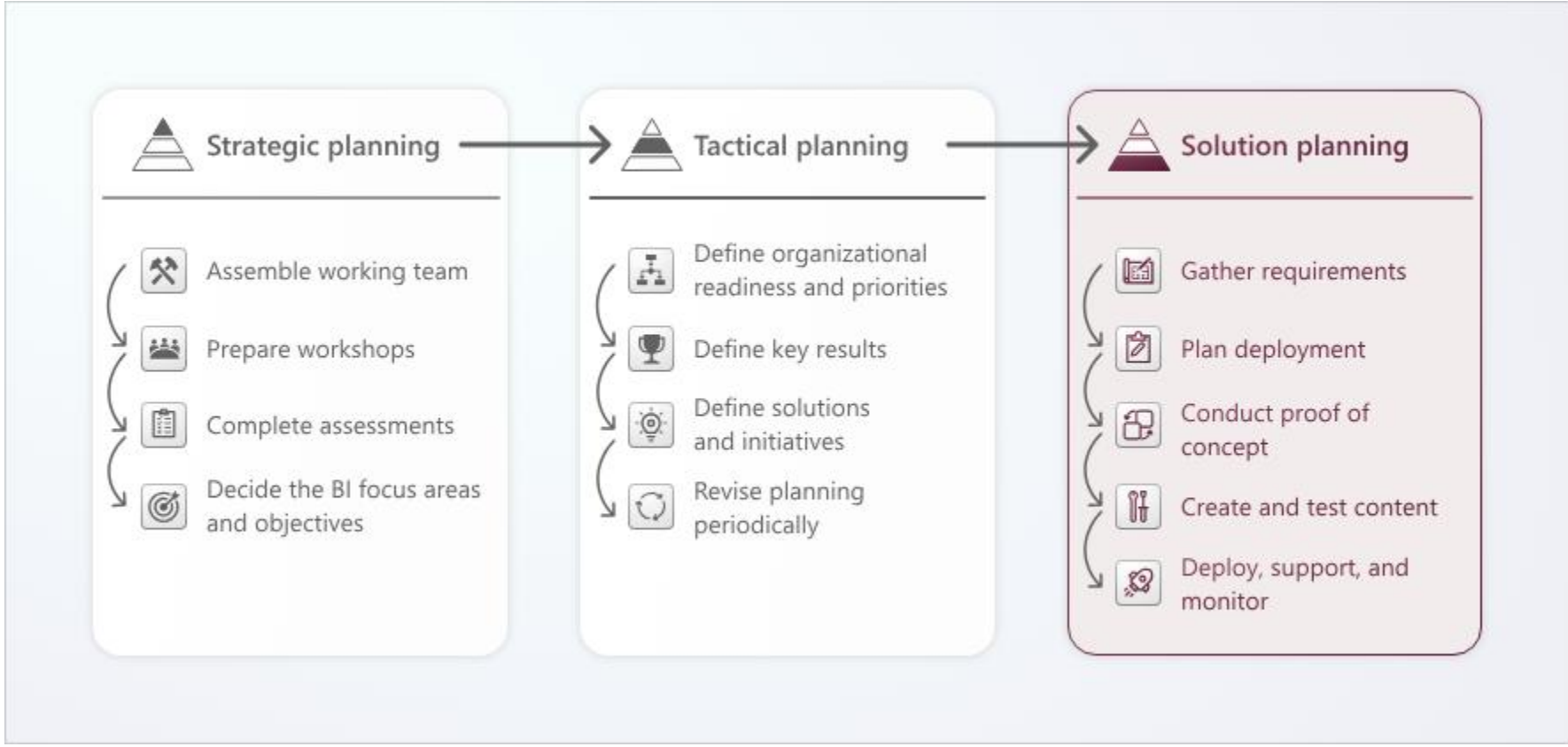
Putting together the Fabric Playbook
Which activities are required to get there?

	Workshop 1: **Vision & Criteria for Success**	Workshop 2: **People**	Workshop(s) 3-6: **Technology**	Workshop(s) 7-8: **Processes**	Activity 9: **Consolidation & Roadmap**	Activity 10: **Presentation**
Activity:						
Output:	• Alignment on vision, key initiatives, priorities and critical criteria for success in relation to overall strategy and priorities. • Alignment on key stakeholders and their interests.	• Alignment of ownership and central / decentral management of key functions. • Overview of overall organization, roles and competencies. • Overview of necessary initiatives to ensure enablement and adoption. • Identification of Data Persona archetypes (elaborating on results from Power BI governance)	• Design overall infrastructure and architecture for Fabric platform, based on identified Data Persona archetypes. • Design of content lifecycle management and platform management, incl. alignment with Power BI principles. • Identify and scope necessary templates for ingestion, transformation, storage and serving.	• Overview of overall delivery mode and necessary supporting utilities to be made. • Overview of necessary governance initiatives for Fabric and Power Platform, organization hereof and alignment with Power BI Governance effort. • Overview of operations requirements, monitoring and auditing, and alignment with Power BI initiatives.	• Consolidating of Playbook, including Recommendation for architecture (high level + detailed) and infrastructure decisions. • Overall operating model for Fabric, incl. process definitions. • Governance decisions and monitoring requirements. • Roadmap for implementation of recommended measures.	• Roadmap of agreed initiatives, their dependencies and order of execution to enable the defined vision. • Walk-through of agreed recommendations. • Overview of which use cases can be sustained at instance, and which use cases may have dependencies to preliminary actions. • Dialogue on ”what it takes” and next steps to move forward. • Ballpark estimates of phases in the roadmap.

Putting together the Fabric Playbook
What does it look like in practice?



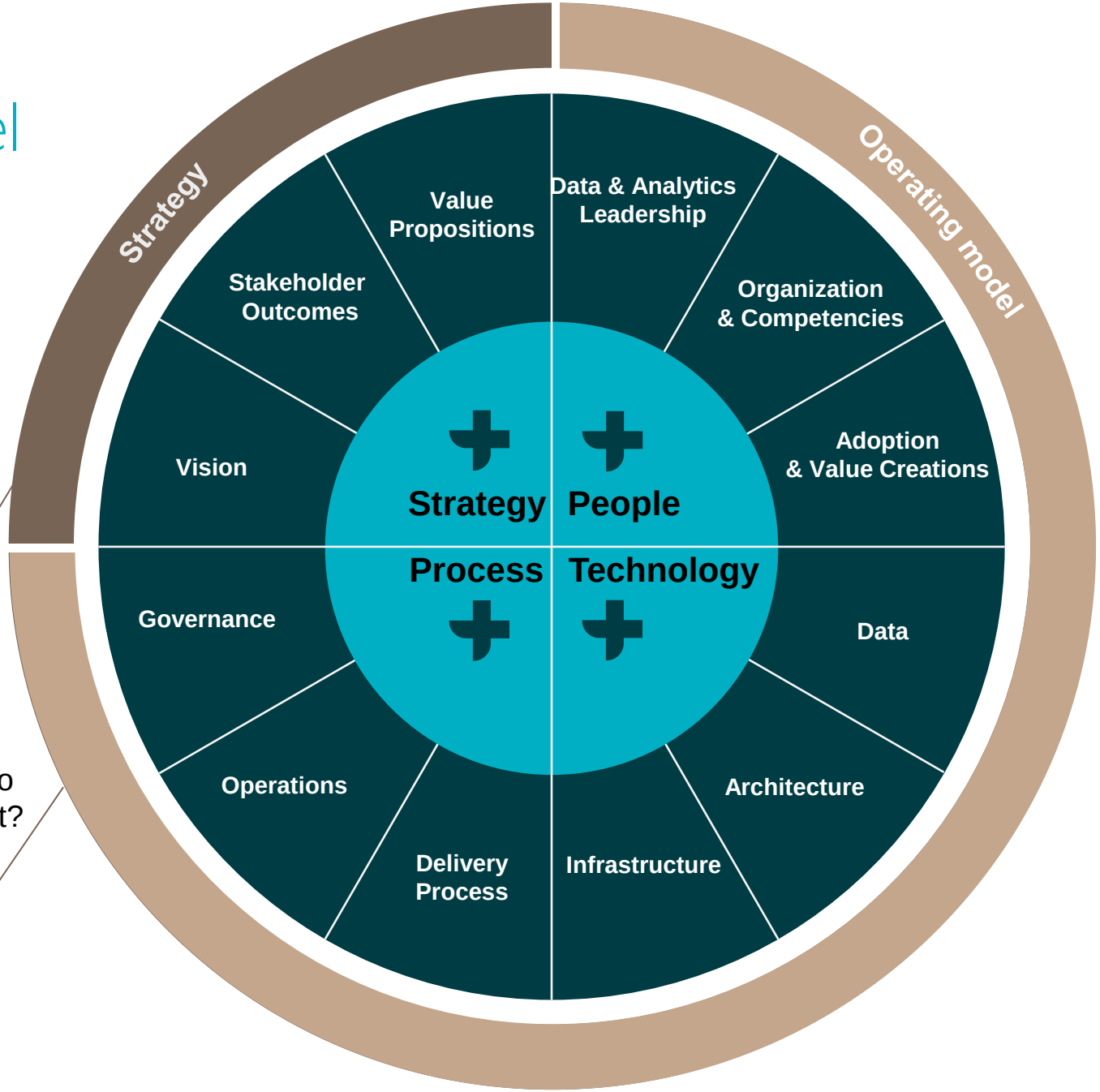
Fabric Playbook
What comes next? From Roadmap to Implementation



Fabric Playbook:
Data Strategy & Operating Model

Strategy:
Why are we doing this & how will we succeed?

Operating Model:
How are we going to execute & with what?



Thank you!

Let's get in touch.

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