# Lisa | Project Plan + Outline

\*\*Note: this document is still in the works, so the phrasing may be imprecise or completely incorrect. If you see any errors, suggestions and feedback would be greatly appreciated.\*\*

## Overview

**Draft:**[Lisa | Updated Draft for QuickSight Q Walkthrough](https://quip-amazon.com/TM0kAEhvlnKG)

**Feature:** Amazon QuickSight Q

**Intended Audience:** Analysts, BI Engineers, Data Engineers, Topic Creators/Individuals with Permission to the Dataset and Topics

**Potential Keywords:** Amazon QuickSight Q, natural language, natural language query (NLQ), instant visualizations , AI data visualization

**User Stories:**

* **From Deepak:** You are a BI Engineer responsible for creating and maintaining reports and dashboards published to business users who rely on these reports to make their day to day business decisions
* **Full Scenario:**
  + **Analyst:**D is a BI Engineer responsible for creating and maintaining dashboards on QuickSight published to business users, who reply on the visualizations for day-to-day business decisions. D understand the datasets and data models used, but needs to be able to generate personalized visualizations at a moment’s notice. With Q enabled in QuickSight, D is able to quickly transfer information about the data model and allow other users to create visualizations instantly.
* **Acceptance Criteria: (the user will be able to...)**
  + understand/describe the *high-level* mechanisms behind Q + what makes it work
  + understand what topics are and why they might want to use them
  + create a topic
  + configure metadata (dataset + field level) for their topics
  + configure details (role, default aggregation, semantic type, value format, etc.) for their fields + values
  + iteratively test their topic before sharing it with their users
  + manage and analyze their topics
* **Notes:**
  + ensure that the documentation is both applicable + useful to small/large organizations
  + [tk] ask deepak about the use cases + how to grant specific users access to Q data
  + larger companies might need to know how to give permissions to a large group of people
  + assume that users know the field but not the tool!

## Plan

## Updated Outline 6/23

Note: Titles are working titles.  This document will be included in the [tk].

* Intro
* Prereqs
* Scenario
* Steps to the Walkthrough
  + Prepare Datasets for Amazon QuickSight Q
  + Create a Topic
  + Develop Natural Language Friendly Datasets
  + Improve Topics
  + Manage Topics
* Prepare Datasets for Amazon QuickSight Q
  + Intro
  + Expected Questions
  + Clean + Acquire Data
  + Understand Data Model
* Create a Topic
  + Intro
  + Scope
  + Making a Topic
  + Add Data
* Develop Natural Language Friendly Datasets
  + Intro
  + Time Basis
  + Configure Datasets
  + Configure Fields
    - Edit Field Data/Values
    - Include/Exclude
    - Add Cols
    - Add Friendly Names
    - Add Synonyms
    - Add Details
      * description
      * role
        + measures
        + dimensions
      * default aggregation
        + dimensions

count

count distinct

* + - * + measures

[tk]

* + - * not allowed aggregation
        + dimensions (considerations)
        + measures (considerations)
      * semantic type
        + semantic sub-type
      * filters
* Improve Topics
  + Testing—asking Q questions
  + Correcting Answers
    - defining terms for q
    - disambiguating
    - changing the aggregation
  + customizing the visualizations
* Manage Topics
  + Sharing
    - Access/permissions (prereqs or main docs)
  + Topic Summary
    - Total Questions
    - Positive comments
    - Negative comments
    - overall list of questions
  + Reviewing Feedback
  + Adjusting for Actual Questions vs Expected Questions