Preview Application

Executive Summary & Demo Guide

Purpose-built for clear, 5–10 minute demos using safe sample data.

October 24, 2025

What this is

- Lightweight web app to showcase core workflows end-to-end

- Uses sample data; safe to demo without production access

- Designed for quick, repeatable storytelling

Objectives

- Make the value immediately legible to semi-technical audiences

- Standardize the demo storyline across teammates

- Collect feedback on gaps before a broader release

Capabilities (at a glance)

- Connect: upload CSV or use included sandbox datasets

- Transform: simple filters, joins, and calculated fields

- Explore: query builder + quick metrics

- Visualize: dashboards with slicers & drill-downs

- Share: export views and read-only demo links

Who will use this preview

- Sales & PMs to demonstrate outcomes, not internals

- Data-curious stakeholders to self-serve a scenario

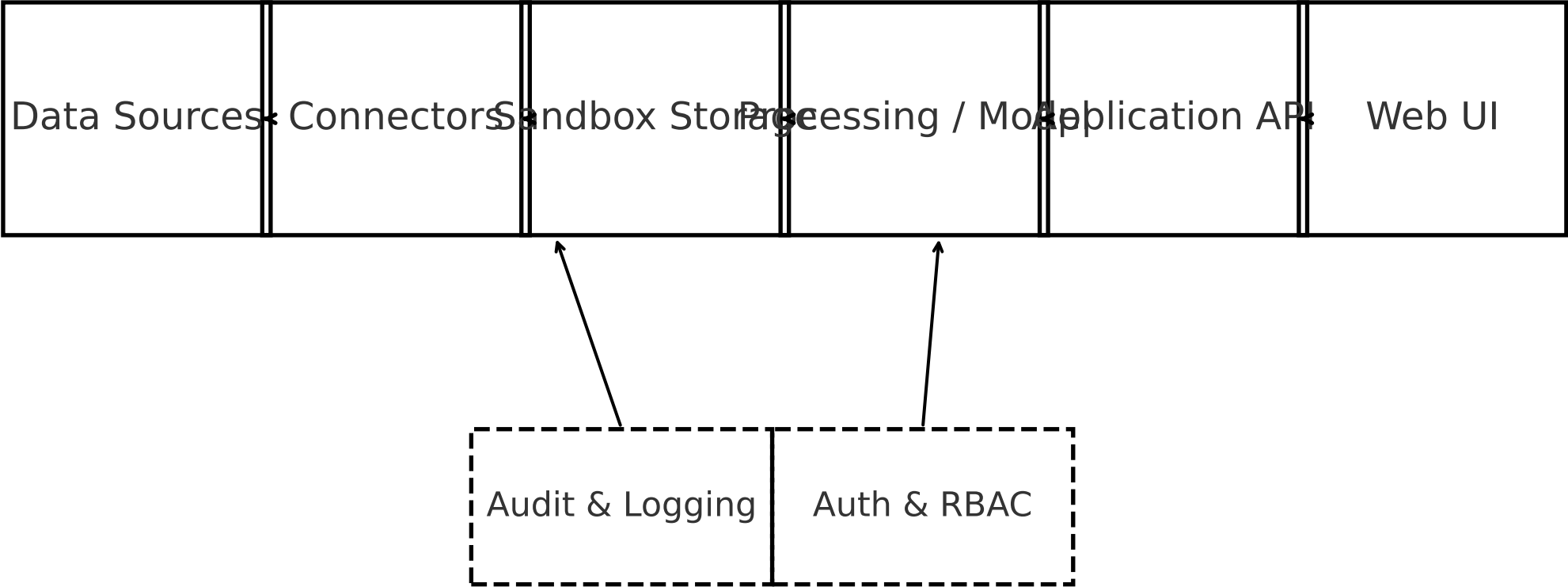- Engineers for quick sanity checks during reviews

Demo flow in 60 seconds

- Pick a scenario (e.g., pipeline health)

- Open the prepared dataset & dashboard

- Adjust slicers; drill into an anomaly

- Save a view; export or share link

Key components

- Web UI

- Application API

- Processing / Model Layer

- Sandbox Storage

- Connectors (CSV / DB)

- Auth & Roles

How the components interact (high level)

Data Sources → Connectors → Sandbox Storage → Processing / Models → Application API → Web UI

Audit & Logging | Auth & RBAC

Request → response (simplified)

- UI sends your filters to the Application API

- API reads from the model or cache in the sandbox

- Results are returned and rendered in the browser

Data refresh flow (simplified)

- Connector pulls sample data on a safe schedule

- Transforms materialize into sandbox tables

- Dashboards update on next view or on refresh

Web UI

- Scenario picker guides the story

- Data explorer with safe defaults

- Dashboard canvas with chart & table tiles

Connectors & import

- Drag-and-drop CSV; sample datasets included

- Optional read-only DB connection in preview

- Basic schema detection & data profiling

Modeling & queries

- Calculated fields (e.g., margin, growth %)

- Reusable metrics with clear definitions

- Friendly SQL editor with templates

Dashboards & interactions

- Filters/slicers, drill-through, cross-highlight

- Quick annotations to capture insights

- One-click export to image or PDF

Optional modules (if enabled)

- Threshold alerts on KPIs

- Scheduled dataset refresh in sandbox

- Notifications via email or webhook

Access & governance

- Role-based access (Viewer, Demoer, Admin)

- Row-level security for sample personas

- Audit logs for demo reproducibility

Demo script — Explorer scenario

1. Open scenario "Revenue by Region"

2. Show default metrics; explain definitions

3. Slice by Region → drill into an outlier

4. Switch to table; show detail rows

5. Save the view as "Regional Focus"

Demo script — Data → insight

1. Upload sample CSV "Returns"

2. Join with "Orders" on OrderID

3. Create metric: Return Rate

4. Add a chart; pin it to the dashboard

5. Set an alert for Return Rate > 5% (if enabled)

Demo script — Sharing

1. Add a note to a chart to capture context

2. Share a read-only link for review

3. Export the dashboard for email or slides

4. Log feedback directly from the app

Limitations in this preview

- Sample data only; not production sources

- Limited connectors and transforms

- Performance tuned for demos, not scale

What we need from you

- Run one end-to-end demo and note friction points

- Submit three improvement ideas (small is fine)

- Flag any must-have for a broader release

What's next

- Near-term: richer transforms and more connectors

- Mid-term: optional live datasets (read-only)

- Later: automated insights and forecasting

Appendix — Glossary

- Metric: a calculation with a definition

- Drill-through: jump from summary to details

- Row-level security: restrict rows by user

- Slicer: interactive filter on a dashboard

- Alert: notification based on a condition

Appendix — Troubleshooting (quick)

- If a dataset looks empty, re-select the scenario

- If a chart fails to load, refresh the page

- If access is denied, ensure the right role is assigned

Contact & feedback

- To provide feedback, reply to the sender of this deck

- For issues during demos, capture a screenshot and steps

- Thank you for trying the preview