

erwin DM Prepaid Upgrade Package

Description

Quickly and efficiently upgrade the erwin Data Modeler (“erwin DM”) within your organization rapidly with the **erwin DM Prepaid Upgrade** package. Offered through erwin Professional Services Organization, you receive expert guidance and assistance to continue your journey to find, visualize, design, deploy, and standardize your enterprise data assets.

The **erwin DM Prepaid Upgrade** service is a tailored implementation package designed to assist you with the further implementation and configuration of your Data Modeler purchase with the newest DM version. The service focuses on ensuring the erwin DM is upgraded and configured optimally for both your environment and your end user needs.

Note: the erwin DM Prepaid Upgrade service includes upgrade and setup of purchased Erwin DM version and modules only. This package’s activity assumed that the installation of erwin DM was completed beforehand either by the customer’s resources or via previously procured erwin services

The **Upgrade** package assists with the following stage:

- **Installation:** Upgrade of all the purchased modules and components within the customer infrastructure.

Each phase will result in the creation of the Project Deliverables listed below in tables per stage identified.

Outcomes

Our erwin Subject Matter Experts (“SMEs”) ensure all the core features and configurations of your upgraded erwin DM ecosystem are properly setup and provisioned quickly and efficiently within your environment. Our SMEs also work closely with your IT team to properly plan the targeted environment configuration prior to solution deployment. By leveraging our time-tested methodologies and expert guidance through the entire implementation processes, your end user teams will quickly gain access and start utilizing the renewed erwin Data Modeling solution.

Benefits

- Ensure your erwin DM solution is set up quickly and properly within upgraded DM framework
- Save valuable time with help from experts to re-deploy your upgraded solution
- Learn best practices to ensure your solution is optimally configured and maintained

Approach and Activities

An erwin Services consultant will work with the necessary customer stakeholders and subject matter experts to re-deploy the upgraded erwin DM package into your organization. The activities performed may vary based on the complexity of the customer’s environment and technical needs.

Installation Phase

erwin will perform one to two workshops to upgrade and configure the Erwin DM instance according to the design phase output.

Project Deliverables	Description
Environment and pre-requisites	<ul style="list-style-type: none"> • Session on new and improved items pertaining to the latest GA product release (as required) • Review Infrastructure requirements for latest DM, Mart and DM licensing and Web Portal (if applicable) • Provision Infrastructure
erwin Product Installation	<ul style="list-style-type: none"> • Obtain erwin DM license <ul style="list-style-type: none"> ○ Per DM edition (Standard, Workgroup, or Navigator) ○ Concurrent or Node-locked • Upgrade erwin DM (standard edition) per guide’s steps using the executable files • For Workgroup edition install and Upgrade DM Mart • Restore (if required) Database (SQL Server, Oracle, or PostgreSQL) for Mart (workgroup edition) and Web Portal (if applicable) <ul style="list-style-type: none"> ○ Upgrade Mart Server (as a Windows service) ○ Upgrade erwin Mart ○ Web Admin for configuration options • Re-activate/validate erwin DM license • Upgrade Web Portal (if applicable)
Documents & Outputs	<ul style="list-style-type: none"> • Verification of Installation (Health Check) <ul style="list-style-type: none"> ○ Model creation/open ○ Connection to Mart ○ Publish erwin model to Web Portal (if applicable)

Prerequisites and Assumptions

erwin will provide a prerequisites document two weeks before the engagement. This details various customer dependencies such as firewall ports, certificates, and accounts. This must be reviewed, completed, and communicated back with erwin. Failure to complete these prerequisites will result in delays which may mean that the above deliverables cannot be met.

- Scope of services assume just one erwin DM environment upgrade
- The latest general availability version of erwin DM will be installed.
- One of the following licensed products will be installed: (1) erwin Data Modeler Standard Edition (2) erwin Data Modeler Workgroup Edition (3) erwin Data Modeler Navigator Edition.
- The following steps are assumed to be completed beforehand either by the customer's resources or via previously procured erwin services:
 - Collect and verify prerequisites, architecture, and environment to support objectives of this package.
 - Collaborate with the customer to support all appropriate infrastructure planning items, access, connectivity, and accounts in preparation for the installation activities.
 - Previous version of erwin product installed and configured at the customer's environment.
- All service activity sessions are to be completed within a two (2) business week period not to exceed 24 hours of erwin level of effort.
- Services do not include Travel & Expenses. Travel & Expenses will have an additional cost if incurred solely due to a request by the Customer and will be invoiced at cost. All travel must be preplanned through project management.
- Customer will ensure the target environment meets or exceeds the hardware and operating environment software minimum specifications outlined in the installation guide.
- If Customer desires erwin to perform the physical installation, all VPN access, VDI/desktop access, standard and privileged accounts, and all other required connectivity is in place to ensure the vendor's activities can be completed remotely. Otherwise erwin will guide Customer IT resources through the defined phases
- The Customer will ensure relevant technical resources are identified and available to participate in defined phases, answer questions, and complete install verification as scheduled or needed.
- Appropriate firewall rules are created by the customer (erwin will supply requirements ahead of the engagement, customer to indicate minimum lead time for firewall requests)
- Necessary certificates are defined (identified during Discovery Phase)
- Customer Maintenance windows, change controls and security protocols are approved
- Authorization model is approved, including email protocol, collaboration tools, file exchange, NDA/CA and similar.

SKU

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