

erwin DI Suite Prepaid Knowledge Transfer Package

Description

The erwin Data intelligence Suite ("DI Suite") Knowledge Transfer service is a prepackaged bundle of workshops designed to facilitate a Series of informal foundational training sessions covering the purchased product components and familiarize customer staff with product capabilities and core terminology.

The **Installation & Setup** package assists with the following stages:

- **Discover:** Collect and verify workshop prerequisites & targeted teams / attendees
- **Design:** Definition / Modification to delivery schedule, venue, and agendas
- **Knowledge Transfer:** Delivery of foundational training workshops covering the purchased product components.

This phase will result in the creation of the Project Deliverables listed below in table per stage identified.

Outcomes

Our erwin Subject Matter Experts ("SMEs") ensure all the core features and functions of your DI Suite implementation are properly reviewed and demonstrated to your end user base. Our SMEs also work closely with your teams to ensure each session targets the right user base maximizing resource time and ensuring the proper transfer of knowledge. By leveraging our time-tested methodologies your teams will be quickly and expertly guided through each of the product area developing a foundational understanding of the solution.

The service will leverage erwin Subject Matter Experts ("SMEs") to guide end users quickly and expertly through each of the product area.

Benefits:

- Ensure your teams have a foundational understanding of product functionality and terminology
- Save valuable resource time by scoping each session to individual roles and responsibilities
- Provides a venue for questions and answers prior to deep diving into project utilization
- Session Recordings for extended learning

Approach and Activities

An erwin consultant will work with the necessary customer stakeholders and subject matter experts to plan and execute knowledge transfer sessions for your organization. The activities performed may vary based on the purchased DI Suite modules.

Discovery Phase

erwin will host one workshop with the customer to review knowledge transfer session prerequisites, identify targeted audiences, and Customer readiness.

Project Deliverables	Description
Workshop	<ul style="list-style-type: none"> • Introduction, Roles & Responsibilities, Communication • Purchased Modules • Workshop Requirements & Recommendations • Attendee Roles and Responsibilities • Desired delivery tempo and schedule
Documents & Outputs	<ul style="list-style-type: none"> • Workshop Pre-requisites Document • Workshop Agendas • Workshop Schedule

Design Phase

erwin will host one workshop with the customer team to document the planned workshop attendees, structure, and delivery timing.

Project Deliverables	Description
Workshop	<ul style="list-style-type: none"> • Review predefined session agendas • Align targeted attendees to sessions • Define delivery method • Review Resource availability
Documents & Outputs	<ul style="list-style-type: none"> • Workshop & Attendee Matrix • Workshop Schedule Updated • Scheduled Workshop Sessions

Knowledge Transfer Phase

erwin will host multiple product module-based workshops with the required end-users based on pre-defined schedule

Project Deliverables	Description
<p>Workshops</p> <p>Note: Workshops (one per each module) recorded, PPT when available.</p>	<ul style="list-style-type: none"> • Admin and Resource Management (mandatory) • Metadata Manager Overview (mandatory) • Mapping Manager Overview (mandatory) • Workflow Manager (mandatory) • Business Portal Overview (optional, depending on licensing) • Lifecycle Management, incl. Requirements Manager, Test Manager, Release Manager (optional, depending on licensing) • Reference Data Manager, AI Match, Codeset Manager, Report Manager (optional, depending on licensing) <p><i>Please reference Appendix A. for module descriptions</i></p>
<p>Documents and Outputs</p>	<ul style="list-style-type: none"> • Knowledge Transfer Workshops • Recorded Sessions

Prerequisites and Assumptions

erwin will provide a prerequisites document two weeks before the engagement. This details various customer dependencies. 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. erwin is not responsible for any delay in schedule or milestone delivery that may result from the below assumptions not being met.

- Scope of knowledge transfer services is on workshop per purchased DI Suite Module.
- Workshop attendees' size is not to exceed the number of licenses purchased
- All service activity sessions are to be completed within a two (2) business week period and 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.
- The Customer will ensure end users have the appropriate access to the deployed DI Suite environment
- The Customer will ensure relevant business and technical resources are identified and available to participate in defined phases, answer questions, and complete planning and design phases as scheduled or needed.
- The Customer is responsible for the scheduling and attendance of workshop participants.

SKU

AEC-ERW-PP	erwin DI Suite Prepaid Knowledge Transfer Package	Pre-Paid
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Appendix. A DI Suite Modules

- **Metadata Manager.** Metadata management is done via Metadata Manager module. It involves scanning metadata from a data source and storing it in a central repository. Customer can preview the data, profile it, generate pattern summary report and provide data quality score. After performing source to target mappings in the Mapping Manager, customer can run Forward or Reverse lineages and perform impact analysis in the Metadata Manager
- **Mapping Manager.** Mapping Manager is the core of erwin Data Intelligence Suite (DI Suite), where you do the following:
 - Source to target mappings using the Metadata Catalogue
 - Associate crosswalks to mappings using the Code Mapping Catalogue
 - Associate reference data to mappings using the Reference Table Catalogue
 - Associate requirements to mappings using the Specification Artifact Catalogue
 - Create new mapping versions
 - Specify test cases
- Once mappings are approved for coding, ETL developers can export them as coding requirements. They can also export the mappings to XML and automatically generate ETL/ELT jobs for ETL tools, such as Informatica PowerCenter, IBM DataStage, Microsoft SQL Server SSIS, and so on.
- **Glossary Manager.** Business Glossary is managed via Business Glossary Manager. It involves creating, managing, and collaborating on common business vocabulary across the organization. Business Glossary Manager supports regulatory compliance, data governance, and data stewardship. It facilitates lineage maps by showing how semantic definitions are related to physical data dictionaries, data mappings, and data lineages.
- **AI Match.** The AI Match engine automatically finds and suggests the best possible table and column matches scores for business terms. These suggestions are scored based on their relevancy against business terms. Based on the match scores, you can then select and associate tables and columns with business terms.
- **Reference Data Manager.** Reference data management is done via Reference Data Manager. It involves creating database like structures to maintain all your reference data. You can add reference data in a reference table from a spreadsheet, manually or via a DB scan. To validate reference tables for data quality tests, you can use SQL queries. You can also version, publish (to environments like production, development, test etc.), and link the reference tables to relevant mappings
- **Codeset Manager.** Codeset management is done via Codeset Manager. It involves creating, managing, and mapping codesets in the Codeset Manager. It has two sections:
 - Enterprise Codesets: Under the Enterprise Codesets section, you can create and manage codesets. It involves importing legacy codesets, categorizing codesets, defining code values, versioning codesets, and publishing codesets to various environments.
 - Codeset Mappings: Under the Codeset Mappings section, you can create and manage code crosswalks (mappings). It involves categorizing code mappings, defining code crosswalks, versioning code crosswalks, and publishing code crosswalks to various environments

- **Life Cycle Management.** Life cycle Management involves requirements, release, and test management.
- **Requirements Manager.** Requirements management is done via Requirements Manager. It involves standardizing functional requirements documentation, creating, collaborating, and customizing templates to manage functional requirements, and linking requirements to data mappings.
- **Test Manager.** Test management is done via Test Manager. It involves viewing and analyzing test specifications created under Metadata Manager and Mapping Manager.
- **Release Manager.** Release management is done via Release Manager. It involves creating and managing releases and release calendars. You can release data mappings, database objects, and release notes to standardize the release process
- **Report Manager.** You can view, create, manage reports, and dashboard configurations from the Reporting Manager. You can also evaluate the team's productivity and create statistical reports. It involves creating and publishing reports and dashboards. From the Reporting Manager, you can generate custom reports of your data integration project using SQL queries
- **Workflow Manager.** The Workflow Manager enables you to manage and create automated workflows to perform a task in Business Glossary Manager, Metadata Manager, and Mapping Manager. It also provides workflow execution insight. Also, you can create a collection of workflows and assign those workflows to any module based on the requirement
- **Business User Portal.** erwin DI Business User Portal (BUP) is a self-service, read-only portal targeted at business users. It provides you with an easy way to access data governance and management information stored in erwin Data Intelligence Suite (DI Suite). It has flexible search and filter mechanisms, which make analysis and decision making easy for you.