erwin Data Intelligence Suite Prepaid QuickStart Basic

Overview

The erwin Data Intelligence Suite (DIS) **QuickStart Basic** service is a pre-packaged offering specifically designed to assist Customer with the initial implementation and configuration of the erwin Data Intelligence Suite. The service provides Customer with the levels of expert support required to address the core functionality, provide fundamental training and knowledge transfer, and provide the fundamentals for the best practices of Data Governance practice within the DI Suite.

The **QuickStart Basic** package assists with the following stages:

- Installation and Setup: Support Customer with infrastructure & prerequisites preparation and validation and the installation and base configuration of the purchased erwin DIS components (includes validation of solution functionality).
- Knowledge Transfer: Provide the necessary training and skills insights to the Customer project team to support the subsequent effective and efficient project implementation
- Project Enablement: Guide the Customer team and key stakeholders in implementing a mutually agreed selection of use cases through the different solution capabilities and functionalities.
- Project Management Support for Quest activities and resources throughout the entire project implementation as described below. Customers should supply a project manager for the overall project implementation.

The benefits of leveraging the erwin QuickStart package include:

- Ensure the quick and efficient installation of the Data Intelligence Suite
- Provide professional training and knowledge transfer
- Quickly and effectively identify targeted technologies and their implementation requirements
- Ensure best practices are communicated and implemented as agreed upon by the customer

Activities Description

The erwin PSO (Professional Services Organization) team will work closely together, in a collaborative and agile way, with the Customer project team to address the mutually agreed Use Cases (as defined during the Presales process and confirmed during the project initiation phase).

To support the implementation of the above Use Cases, the erwin PSO team will:

Install the Data Intelligence Suite

Our infrastructure specialists and technical consultants will support Customer to:

- Provide Customer with the necessary infrastructure diagrams for installation of erwin DIS
- Review and validate installation and configuration of all prerequisites
- Coordinate with Customer resources, as required by Customer, in preparation for the installation process
- Install purchased components of erwin DIS in a maximum of one designated environment
- Confirm the operation and functionality of the installed components

Organize and Prepare the Project

The erwin Project Managers and PSO Consultants will work together with Customer stakeholders via five 1-hour Joint Application Discovery Sessions to:

- Review and agree on project objectives and deliverables
- Introduce project team members and corresponding responsibilities
- Mutually agree on an implementation timetable, incorporating priorities, resourcing, and all other dependencies
- Refine the erwin implementation approach to match the specific project requirements more closely
- Agree on reporting, escalation and issue problem-solving practices and procedures
- Schedule (or agree on a scheduling practice) discovery and other implementation workshops, including meetings with Customer SMEs as needed
- Develop a project plan and agree to timelines for all Quest deliverables
- Confirm Customer resources and availability

Gather, Analyze and Document Requirements

Our consultants and architects will work closely with the Customer-designated teams, end-users, and stakeholders to:

- Review current Data Governance and Intelligence state and maturity
- Identify and prioritize up to two standard scanner technologies (as delivered in and with the purchased erwin Product) with three sources each that Customer wants to catalogue with erwin DIS
- Identify the solution configuration requirements for each mutually agreed upon Use Case
- Document the detailed technical, implementation and usage configuration details

Configure the erwin Data Intelligence Suite ecosystem

The erwin PSO team will work together with the Customer project team, using a series of iterative and agile interactive workshops to:

- Present the technical dimensions of each standard connector technology implementation in scope
- Discuss (if applicable) the different implementation and configuration options and agree on the desired options
- Define a detailed implementation and review strategy
- Implement and test each agreed configuration with Customer shadowing the process

The scope of implementation will include the following:

- Data Catalogue configuration
- Data Lineage configuration
- Business (and other) Glossary configuration
- Discover Assets configuration
- Standard connector connection and testing

Training, Knowledge Transfer and Knowledge Support

Access to foundational computer-based training for Customer employees will be provided, covering the following topics:

- Use and configuration of each different DIS module
- Transfer of both use and configuration best practices

The erwin team will also provide, throughout the duration of the project:

- Knowledge support and handholding related to the activities described above
- Answers to knowledge-related questions related to the activities described above

Project Management Support

Throughout the project, erwin PSO will assign a designated Project Manager or Project Coordinator. The role of the Project Manager is to:

- Develop, jointly with the customer team, the detailed project implementation plan for all Quest activities and resources and monitor/ support it to conclusion
- Ensure that Quest resources attend the right sessions at the right time and manage overall scheduling
- Produce a weekly status report and create a detailed project plan for all Quest activities with a projected schedule based on estimates below. This project plan should supplement the Customer's end to end project plan for the project.

Start	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7
Analysis	Kick Off	JAD Sessions					
		Deployment	Product Deployment				
			Enablement	Data Catalog	Data Lineage		
					Data Quality		Training

Assumptions:

1. Project Plan is indicative of an average DI Suite Implementation - final project plan is developed with the customer during the JAD Sessions.
2. Schedule is based on having dedicated customer resources and access to technology SMEs over the life cycle of the project.
3. Access must be provided promptly to all servers and systems for installation and scanning.

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Conditions and Limitations

Limitations

The QuickStart Basic provides support to Customer to address:

- The setup of up to two (2) Standard Connectors across three (3) different sources each
- Installation of up to one (1) environment
- Any fee amount associated with this SKU expires within one (1) year of the date of purchase of this SKU.

Prerequisites and Assumptions

Customer should receive the prerequisites document prior to or at the time of delivery of the erwin Product that details various customer dependencies such as firewall ports, certificates, and accounts. Failure to complete or meet these prerequisites will result in delays which may mean that the above activities cannot be performed. The Quest team is not responsible for any delay in schedule or milestone delivery that may result from such failures or from the assumptions below not being met.

- The latest general available version of erwin DI Suite will be installed.
- The scope of installation (DI Suite, Data Quality, etc.) is defined by the procured erwin DI Suite licenses
- 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 the Quest team 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 Quest team's activities can be completed remotely, and the Quest team will not be responsible for any delay or inability to perform the activities to the extent caused by Customer's internal requirements to provide such access to the team. Otherwise, the Quest team will guide Customer IT resources through the defined phases.
- Customer will ensure relevant business and technical resources are identified and available to participate in defined phases, answer questions, and complete validation as scheduled or needed.
- Customer will provide a project manager to oversee non-Quest activities and deliverables.

SKU

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