erwin DM Prepaid Upgrade Package (ADU-ERW-PP)

Overview

The **erwin Data Modeler (DM) Upgrade Package** is a tailored implementation package designed to assist you with the further implementation and configuration of the customer's Data Modeler purchase with the newest (or other newer desired) DM version. The service focuses on ensuring the erwin DM is upgraded and configured optimally for both the environment and the end users' 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.

The Quest Professional Service Consultant will ensure all the core features and configurations of the upgraded erwin DM ecosystem are properly setup and provisioned quickly and efficiently within the customer environment. The Quest Consultant will work closely with the customer IT team to properly plan the targeted environment configuration prior to solution deployment. By leveraging the erwin implementation methodology and expert guidance through the entire implementation processes, the end user teams will quickly gain access and start utilizing the renewed erwin Data Modeling solution.

Benefits

The main benefits of using the **erwin DM Knowledge Transfer package** service are:

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

Activities Description

A Quest Professional 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

Preparation Phase

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

- 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

Installation Phase

- 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)

- 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)

Conditions and Limitations

Limitations

- Scope of services include one (1) erwin DM environment upgrade
- Scope of services not to exceed a total of twenty-four (24) hours
- Any fee amount associated with this SKU expires within one (1) year of the date of purchase of this SKU.

Prerequisites and Assumptions

Quest will provide a prerequisites document 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.

- The latest general availability version of erwin DM will be installed.
- One of the following licensed products will be installed:
  - erwin Data Modeler Standard Edition
  - erwin Data Modeler Workgroup Edition
  - erwin Data Modeler Navigator Edition.
- The following steps are assumed to be completed by the customer prior to the start if tge engagement:
  - o Collect and verify prerequisites, architecture, and environment to support objectives of this package.
  - o Collaborate with the customer to support all appropriate infrastructure planning items, access, connectivity, and accounts in preparation for the installation activities.
  - o Previous version of erwin product installed and configured at the customer's environment.
- 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 pre-planned 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 the Customer desires Quest 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 Quest 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

SKU

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