

erwin DM, WGE, and ER360 Prepaid Knowledge Transfer Package

Overview

The erwin Data Modeler (DM) Suite, Workgroup Edition, and ER 360 Knowledge Transfer service is a series of interactive, remote (unless otherwise agreed) workshops designed to facilitate foundational knowledge transfer for erwin Data Modeler Suite components including Workgroup Edition and ER360 functionality and familiarize Customer staff with product capabilities and core terminology.

The **Knowledge Transfer** package consists of the following stages:

- Discover: Collect and verify prerequisites & targeted teams / participants
- Design: Definition / Modification to delivery schedule, session platform, and agendas
- Knowledge Transfer: Delivery of foundational training workshops covering the purchased product components

Benefits

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

- Ensure your teams have a foundational understanding of product functionality and terminology
- Provides a platform for questions and answers prior to deep diving into solution use
- Session can be recorded for extended learning

Activities Description

Quest will work with the necessary Customer stakeholders and subject matter experts to schedule, execute and document erwin DM Knowledge Transfer workshops. The activities performed may vary based on the complexity of Customer's environment and technical needs.

Discovery Phase

Quest will host one workshop with Customer to review knowledge transfer session prerequisites, identify participants, and Customer readiness, this session will cover:

- Introduction, roles & responsibilities, communication
- Review of purchased modules
- Workshop requirements & recommendations
- Attendee roles and responsibilities
- Desired delivery tempo and schedule

Design Phase

Quest will host one workshop with the Customer team to document the planned workshop participants, structure, and delivery timing:

- Review predefined session agendas
- Align targeted participants to sessions
- Agree session delivery platform
- Review Resource availability

Knowledge Transfer Phase

Quest will host a series of online product module-based workshops with the required end-users based on pre-defined topics: See Appendix A below.

Conditions and Limitations

Conditions

Customer must already have the latest generally available version of erwin Data Modeler and Workgroup Edition installed in accordance with applicable documentation prior to performance of this Knowledge Transfer package.

Prerequisites and Assumptions

- Workshop participants' size is not to exceed the number of licenses purchased, with a maximum of 10 per class, unless expressly agreed upon in writing and coordinated by Customer and Quest.
- All service activity sessions are to be completed within a eight (8) business week period and not to exceed a total of 40 hours of Quest level of effort.
- This Service offering expires twelve (12) months from the date of purchase. Quest uses Microsoft Teams for web / teleconferencing; however, an equivalent Customer solution can be used by mutual consent.
- No Service shall be performed during local, state, or federal holidays unless expressly agreed upon in writing and coordinated by Customer and Quest.
- This service is expected to be delivered remotely and does 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 project team shall be assigned following Quest's receipt of the SO executed by Customer and Customer's PO (if required). The Services shall start upon mutual agreement of the parties. The typical lead time for scheduling the start of delivery is four to six weeks.
- The Service will be delivered in the English language, unless expressly agreed upon in writing and coordinated by Customer and Quest.
- Customer will ensure end users have the appropriate access to the deployed DM Suite environment.
- 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.
- Customer is responsible for the scheduling and attendance of workshop participants.

SKU

ADX-ERW-PP	erwin DM, WGE, and ER360 Prepaid Knowledge Transfer Package	Pre-Paid
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Appendices

Appendix A – erwin DM Suite Knowledge Transfer Modules Example (subject to change)

Erwin Data Modeler Client Training	
Session 1	➤ Data Modeling Review ○ What is data modeling? (Logical vs. Physical) ○ Introduction to erwin – product overview ○ Data modeling notations ○ Entities and Attributes ○ Keys (Primary, Foreign, Candidate, Alternate/Inversion Entry) ○ Relationships (Identifying vs. Non-Identifying / Many-to-Many) ➤ Building the Logical Data Model (Part 1) ○ Building and Editing: ▪ Entities
Session 2	➤ Building the Logical Data Model (Part 2) ○ Building and Editing: ▪ Relationships, Attributes & Keys ➤ Presentation of the Model ○ Subject Areas and Diagrams ○ Themes (font, color, highlights, etc...)
Session 3	➤ Applying Standards ○ Domains ○ Validation Rules ○ Naming Standards ○ Data Type Standards ○ User-Defined Properties ○ Templates
Session 4	➤ Refining the Logical Model ○ Relationships ▪ Rolenames ▪ Many-to-Many resolution ▪ Unification ▪ Recursive Relationships ▪ Super-Types and Sub-Types ➤ The Physical Data Model ○ Derive a Physical Model ○ Logical and Physical Only objects ○ Validation Rules ○ Default Values ○ Indexes
Session 5	➤ Forward / Reverse Engineering ○ Reverse Engineer a Database into erwin ○ Forward Engineer an erwin model to a Database ➤ Complete Compare ○ Compare and synchronize models, databases, and/or DDL
Session 6	➤ Design Layer Architecture ○ Managing Multiple Models ○ Adding Multiple Model Sources

	○ Deriving Models ○ Syncing with Model Source ○ Split Logical/Physical Models ➤ Bulk Editor ○ Search model objects and properties ○ Edit and update in mass
Session 7	➤ Promoting standards and reuse ○ Managing Standards ○ Templates and Source Models ➤ Reporting ○ Mart and cross-model reports ○ Diagrams ○ Report Designer
Session 8	Extra Topics ➤ Data Warehousing Introduction ○ Dimensional Modeling ○ Data Movement ○ Source-to-Target Mapping ➤ Import/Export 3rd Party Models ○ MITI Bridges
Erwin Mart Repository Training	
	➤ Administrators ○ General Mart Concepts ▪ Architecture ▪ Terminology ▪ Key Features ○ Catalog Management ▪ Libraries ▪ Sessions ○ User Management ▪ Add Mart Users ▪ Manage Profiles ▪ Assign Permissions ➤ End Users ○ Incorporating the Mart into your Modeling Life Cycle ▪ Check In/Out ▪ Managing Conflicts ▪ Managing Versions ▪ Refreshing a Model
Erwin er360 Training	
	➤ Administrators ○ Security Management ▪ Creating Users & Groups ▪ Creating Profiles ▪ Access Control ○ Harvesting models from Mart

	➤ End Users ○ Navigating er360 Models
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