

erwin Data Intelligence Suite Prepaid QuickStart Basic

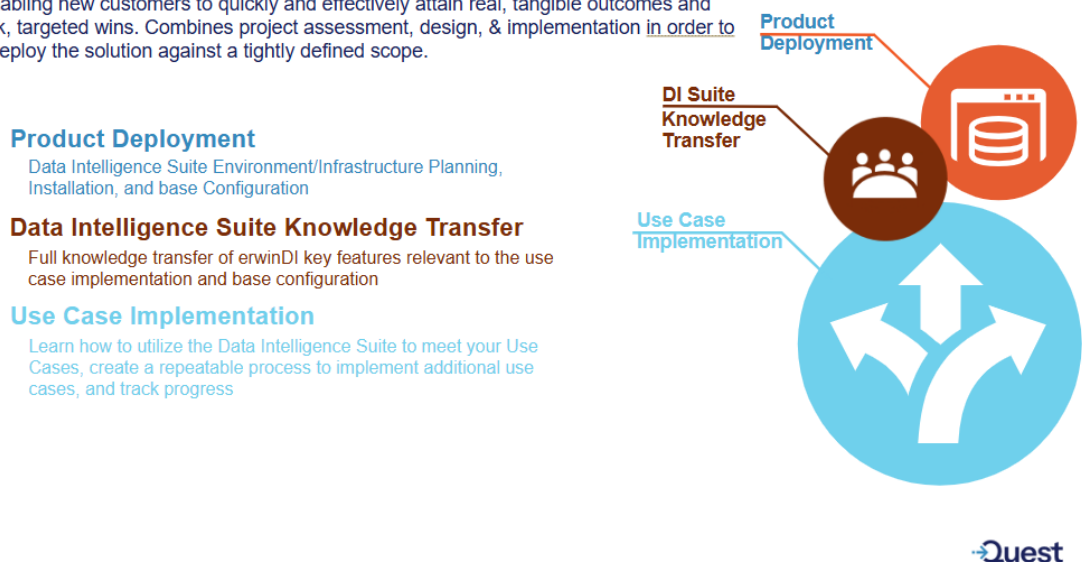
Overview

The **erwin Data Intelligence Suite (erwin DIS) QuickStart Basic** service is a pre-packaged offering designed to assist Customer with the initial configuration and implementation of erwin DIS. The service provides Customer with the levels of expertise required to deploy and configure the solution, delivers knowledge transfer of key features and functionality, and leverages best practices to satisfy Customer's identified Use Case for erwin DIS.

This helps the customer to make high-value, trusted data assets and AI models easier to find, understand, govern, score, and use across their enterprise. Providing data landscape visibility and governance to fuel reliable, high-quality data pipelines, support successful AI outcomes, and get trusted data into the hands of data consumers faster.

DI Suite QuickStart Services

Aimed at enabling new customers to quickly and effectively attain real, tangible outcomes and secure quick, targeted wins. Combines project assessment, design, & implementation in order to effectively deploy the solution against a tightly defined scope.



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

- **Installation and Setup:** Support Customer with infrastructure and prerequisites preparation, support the installation and base configuration of the purchased erwin DIS components.
- **Knowledge Transfer:** Provide the necessary on-the-job training to the Customer project team during the Use Case implementation.
- **Project Enablement:** Guide the Customer team and key stakeholders in implementing a mutually agreed Use Case through the different solution capabilities and functionalities.
- **Project Management:** Provide support for Quest activities and resources throughout the entire project as described below. Customer should also assign a project manager for the duration of the project to oversee its specific tasks and resources.

The benefits of leveraging the erwin DIS QuickStart package include:

- Ensuring the efficient installation of erwin DIS
- Quest Professional Services expertise, guidance, and knowledge transfer
- Quick and effective identification of targeted technologies and their implementation requirements
- Ensuring best practices are communicated and implemented as agreed upon by the Customer

Activities Description

Quest will work closely together, in a collaborative and agile manner, with the Customer project team to address the mutually agreed Use Case (as confirmed during the project initiation phase).

To support the implementation of the above Use Case, the Quest team will perform the activities described below.

Install the Data Intelligence Suite

Quest infrastructure specialists and technical consultants will support Customer as follows:

- Provide Customer with the necessary infrastructure prerequisites for the installation of erwin DIS for on-prem installations or SaaS connector requirements.
- Review and validate the 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 Quest Project team will work together with Customer stakeholders via 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 Quest implementation approach to match the specific project requirements
- 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 Subject Matter Experts (SMEs) as needed
- Develop a project plan and agree on timelines for all Quest deliverables
- Confirm Customer resources and availability

Gather, Analyze, and Document Requirements

The Quest team will work closely with the Customer-designated teams, end-users, and stakeholders to:

- Review the details of the designated use case
- Identify the solution configuration requirements for the mutually agreed-upon use case
- Document the detailed technical, business, implementation, and usage configuration details for that use case

Configure the erwin DIS ecosystem

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

- Define a detailed implementation and review strategy
- Discuss the different implementation and configuration options and agree on the desired approach
- Implement and test each agreed configuration with Customer observing the process

The scope of implementation will include the following:

- The configuration of up to six of the main modules within erwin DIS to satisfy the identified use case. These include Data Catalog, Lineage, Data Product and Glossary, Smart Connectors, and Discover Assets.

Computer-Based Training (CBT), Knowledge Transfer, and Knowledge Support

Access to foundational CBT 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 Quest team will also provide throughout the project:

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

Project Management Support

Throughout the project, Quest will assign a designated Project Manager or Project Coordinator. This role helps 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 are available 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 the 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				
			Use Case Implementation	Business Metadata Technical Metadata Data Quality			
			Knowledge Transfer				

Assumptions:

1. This Project plan is indicative of a typical DI Suite Implementation - the 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.
4. This Project plan is an estimate based on Quest's experiences with other customers, and is subject to change based on various factors including the final developed plan, any changes or variances in assumptions, whether prerequisites and/or conditions are met, individuals' schedules, and Customer's specific infrastructure and needs.

Conditions and Limitations

Limitations

The QuickStart Basic provides support to Customer to address:

- Installation of up to one (1) environment
- The completion of (1) use case
- The setup of up to two (2) Standard Connectors across up to three (3) different sources each
- Up to (20) business items, including terms, policies, and rules.
- Up to (3) marketplace items, including datasets, AI models, and data products.
- Validation of smart connector metadata and lineage as it relates to the use case, if purchased
- Up to (10) manual mappings, if required.
- Data profiling for the identified critical data elements (CDEs)(up to 10) using out-of-the-box rules
- This Service expires twelve (12) months from the date of purchase.

The purpose of this project is to demonstrate to Customer how to create what is needed for a single use case, so Customer can create a repeatable process for updates and new items.

Prerequisites and Assumptions

Customer should receive the prerequisites document before or at the time of delivery of the Quest solution, detailing the various Customer dependencies such as firewall ports, certificates, and accounts. Failure to complete or meet these prerequisites will result in delays that may prevent the above activities from being completed. 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. In addition, Quest's performance of the activities above is conditioned upon:

- The latest generally available version of erwin DIS will be installed.
- The scope of installation (DI Suite, Data Quality, etc.) is defined by the procured erwin DIS licenses
- The Service will be delivered in the English language, unless expressly agreed upon in writing and coordinated by Customer and Quest.
- The Service shall be delivered remotely, unless expressly agreed upon in writing and coordinated by Customer and Quest.
- Services do not include Travel and Expenses. Travel and Expenses will have an additional cost if incurred solely due to a request by Customer and will be invoiced at cost. All travel must be preplanned through project management.
- 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.
- The Quest 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 an Engagement is four to six weeks.
- Customer will ensure the target environment meets or exceeds the minimum specifications for the hardware and operating environment software 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.
- Customer will provide a named project manager/coordinator to oversee non-Quest activities and deliverables.

SKU

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Glossary of Terms

Term	Definition
Use Case	Identifies a problem statement or goal, determines who is currently impacted by the problem or goal, and what value is gained by achieving the resolution of the problem or goal.
Data Catalog	Inventory of technical metadata from different data-at-rest sources
Lineage	The movement of data within the organization's technical landscape.
Data Product	A product that contains data assets to respond to a business request. The data product could contain datasets, reports, AI models, policies, business rules, etc.
Dataset	A collection of data elements that provides a purpose. This can be represented in a report, a single table or view, a collection of tables and/or views, etc. These collections provide answers to specific questions coming from the business.
Standard Connector	In erwin DIS, this accounts for the available data-at-rest connectors that come with the purchase of the solution. For example, this includes databases and files.
Smart Connector	A tool used by erwin DIS to collect data lineage from technologies related to ETL, reporting, SQL queries, and cloud sources.
Discover Assets	The main interface within erwin DIS for the read-only business users.
Business Metadata	Information about business operations including terminology, rules, policies, datasets, data products, AI models, and other custom concepts related to a specific line of business.
Technical Metadata	Information about the technical structures within applications or code, which includes databases, ETL, files, reports, and data models.