

erwin DI Suite Prepaid Upgrade Package

Description

Quickly and efficiently upgrade the erwin Data Intelligence Suite ("DI Suite") within your organization rapidly with the **erwin DI Suite Prepaid Upgrade** package. Offered through erwin Professional Services Organization, you receive expert guidance and assistance to get your current DI Suite environment upgraded to a new version

The **erwin DI Suite Prepaid Upgrade** service is a tailored implementation package designed to assist you with the upgrade and configuration of your Data Intelligence Suite purchase. The service focuses on ensuring the DI Suite is deployed and configured optimally for both your environment and your end user needs.

Note: the erwin DI Suite Prepaid Upgrade service includes upgrade and setup of purchased DI Suite Modules only and does not include purchased smart connector add-ons.

The UPGRADE package assists with the following stages:

- **DI Suite Upgrade**, including an overview of what new in latest GA version of DI Suite in comparison with the previous one. This section also includes the LDAP and SAML advanced components of DI Suite
- **Business User Portal Upgrade**, including an overview of what new in latest GA version of BUP in comparison with the previous one.
- **Advanced Features** installation and configuration depending on customer's needs. These steps cover only new installation of the Advanced features. If SSO/SAML already installed, the upgrade steps are included.

These phases will result in the creation of the Project Deliverables listed below in table per stage identified.

Outcomes

The outcomes of the erwin DI Suite Prepaid Upgrade Package are:

- Installed DI Suite and Business User Portal software upgrades in a scope of standard features and capabilities to empower you to continue successful journey in Data Catalog and Data Literacy with new sets of features and securities.
- Installed and configures advanced security components such as LDAP/SSO/SSL and Elasticsearch to continew you work in safe and efficiaent environmnet.
- Project documentation to set proper objectives and provide reference to the activities both completed and planned

Approach and Activities

An erwin Services consultant will work with the necessary customer stakeholders and subject matter experts to upgrade the DI Suite in your organization. The activities performed may vary based on the complexity of the customer’s environment and technical needs.

DI Suite Upgrade

The activities on DI Suite Upgrade are in the table below.

Project Deliverables DI Suite Upgrade	Description DI Suite Upgrade
Instructions to upgrade the DI Suite software to the new GA version	<ul style="list-style-type: none"> • Overview of what new in latest GA version of DI Suite • Prerequisites to upgrade tomcat and Java) • Upgrading to the erwin DI Suite new GA version • Updating Database Properties • Updating the Documents Folder Path • Updating the LDAP, SAML Properties (if you are using these options) • Upgrading to the compatible Java 8x and Tomcat 9 versions
Documents and Outputs	<ul style="list-style-type: none"> • Results of DI Suite upgrade will be documented: • Executable and Manuals provided • Verification of Installation (Health Check) • Project Plan with schedule

Business User Portal Upgrade

The activities on Business User Portal Upgrade are in the table below.

Project Deliverables BUP Upgrade	Description Business User Portal Upgrade
Instructions to upgrade the BUP software to the new GA version	<ul style="list-style-type: none"> • Overview of what new in latest GA version of BUP • Prerequisites for BUP new GA.4+ & above • Upgrading to the erwin DI BUP new GA version • Configure application properties of BUP in the tomcat • Restart the tomcat server • Login and activate the license key • LDAP Prerequisites • Elastic Search Configuration
Documents and Outputs	<ul style="list-style-type: none"> • Executable and Manuals for BUP upgrade provided • Verification of Installation (Health Check) • Project Plan with Schedule updated

Advanced Features Installation Phase

The activities on Advanced Features Installation Phase are in the table below and are optional. If the advanced features are already installed in the previous version, those items already included in the Upgrade sections.

Project Deliverables Advanced Features Installation Deliverables	Description Advanced Features Installation
Configure advanced features of the erwin tools; verify functionality of software and components.	<ul style="list-style-type: none"> • Install Elasticsearch • LDAP/SSO/SSL Config • Health Check
Documents and Outputs	<ul style="list-style-type: none"> • Verification of Installation (Health Check) • Project Plan with Schedule updated

Prerequisites and Assumptions

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

- Scope of services assume just one DI Suite environment implementation
- Current environment can be no more than two versions behind current GA product, older versions require custom SOW
- All service activity sessions are to be completed within a two (2) business week period 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.
- 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 erwin 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 erwin 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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