erwin DI Suite Prepaid Knowledge Transfer Package

Description

The **erwin Data intelligence Suite ("DI Suite") Knowledge Transfer** service is a prepackaged bundle of workshops designed to facilitate a series of informal foundational training sessions covering the purchased product components and familiarize customer staff with product capabilities and core terminology.

The **Knowledge Transfer** package assists with the following stages:

- **Discover:** Collect and verify workshop prerequisites & targeted teams/attendees

- **Design:** Definition / Modification to the delivery schedule, venue, and agendas

- **Knowledge Transfer:** Delivery of foundational training workshops covering the purchased product components.

This phase will result in the creation of the Project Deliverables listed below in the table per stage identified.

Outcomes

Our erwin Subject Matter Experts ("SMEs") ensure all the core features and functions of your DI Suite implementation are properly reviewed and demonstrated to your end user base. Our SMEs also work closely with your teams to ensure each session targets the right user base, maximizing resource time and ensuring the proper transfer of knowledge. By leveraging our time-tested methodologies, your teams will be quickly and expertly guided through each of the product areas, developing a foundational understanding of the solution.

The service will leverage erwin Subject Matter Experts ("SMEs") to guide end users quickly and expertly through each of the product areas.

Benefits:

- Ensure your teams have a foundational understanding of product functionality and terminology.

- Save valuable resource time by scoping each session to individual roles and responsibilities.

- Provides a venue for questions and answers prior to deep diving into project utilization

- Session Recordings for extended learning

Approaches and Activities

A Quest Services consultant 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 Services Consultant(s) will host one workshop with Customer to review knowledge transfer session prerequisites, identify targeted audiences, and Customer readiness:

- Introduction, Roles & Responsibilities, Communication

- Purchased Modules
- Workshop Requirements & Recommendations
- Attendee Roles and Responsibilities
- Desired delivery tempo and schedule

A Quest consultant will work with the necessary customer stakeholders and subject matter experts to plan and execute knowledge transfer sessions for your organization. The activities performed may vary based on the purchased DI Suite modules.

Discovery Phase

Quest will host one workshop with the customer to review knowledge transfer session pre-requisites, identify targeted audiences, evaluate Customer readiness, and review predefined session agendas.

Project Deliverables	Description
Workshop	- Introduction, Roles & Responsibilities, Communication - Purchased Modules - Workshop Requirements & Recommendations - Attendee Roles and Responsibilities - Desired delivery tempo and schedule
Documents & Outputs	- Workshop Pre-requisites Document - Workshop Agendas - Workshop Schedule

Design Phase

Quest will host one workshop with the customer team to document the planned workshop attendees, structure, and delivery timing.

Project Deliverables	Description
Workshop	- Review predefined session agendas - Align targeted attendees to sessions - Define delivery method - Review Resource availability
Documents & Outputs	- Workshop & Attendee Matrix - Workshop Schedule Updated - Scheduled Workshop Sessions

Knowledge Transfer Phase

Quest will host multiple product module-based workshops with the required end-users based on a pre-defined schedule.

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Project Deliverables	Description
Workshops Note: Workshops (one per each module) recorded, PPT when available.	• Introduction to Erwin DI Tools & Technical Metadata Administration • Resource Administration • Data Lineage Management • Business Glossary Administration • Data Marketplace Administration • Data Discovery • Integration and Best Practices *Please reference Appendix A for module descriptions.*
Documents and Outputs	• Knowledge Transfer Workshops • Recorded Sessions

Conditions and Limitations

Conditions

Customers must already have the latest generally available version of erwin DI Suite installed in accordance with applicable documentation prior to the performance of this Knowledge Transfer package.

Prerequisites and Assumptions

- Scope of knowledge transfer services is on workshop per purchased DI Modules.
- Workshop attendees' size is not to exceed the number of licenses purchased
- All service activity sessions are to be completed within a two (2) business week period and not to exceed a total of 28 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 end users have the appropriate access to the deployed DI 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

AEC-ERW-PP	erwin DI Suite Prepaid Knowledge Transfer Package	Pre-Paid

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Appendices

Appendix A – Erwin Data Intelligence (DI) Tools Administration and Use

Course Description:
This course provides a comprehensive overview of Erwin Data Intelligence (DI) tools, focusing on effective administration, management, and usage techniques. Students will learn how to handle technical metadata, manage data lineage, administer valid values and reference data, develop business glossaries, and manage resources within the Erwin DI environment. Through hands-on exercises and practical examples, participants will gain the skills necessary to optimize data governance and enhance data intelligence within their organizations.

Course Objectives:
By the end of this course, students will be able to:

1. Perform technical metadata administration using Erwin DI tools.

2. Manage data lineage and conduct impact analysis.

3. Administer valid values effectively.

4. Create and manage business glossaries, including catalogs and business terms.

5. Utilize advanced features like AI Match and MindMaps for enhanced data intelligence.

6. Find and understand data assets.

7. Administer resources by managing roles, users, and workflows within the Erwin DI platform.

Course Schedule:
Session 1: Introduction to Erwin DI Tools & Technical Metadata Administration
- **Topics:**
    - Introduction to Erwin Data Intelligence Tools
    - Overview of Technical Metadata Administration
    - Scanning and Importing Metadata
    - Managing Tables and Columns
    - Scheduling and Versioning Metadata Scans

- **Assignment:**
    - Practical Exercise: Perform a metadata scan and import data into Erwin DI.

Session 2: Resource Administration
- **Topics:**
    - Introduction to Resource Administration
    - Navigating the Resource Manager

- o Defining Roles and Permissions

- o Managing Users and Access Control

- o Configuring Workflows for Data Processes

- **Assignment:**

  - o Exercise: Set up user roles and workflows in a simulated environment.

Session 3: Data Lineage Management
- **Topics:**

  - o Introduction to Data Lineage Concepts

  - o Utilizing the Mapping Manager

  - o Defining and Applying Transformations

  - o Mapping Source Data to Target Structures

  - o Conducting Impact Analysis

- **Assignment:**

  - o Project: Create a data lineage diagram mapping source to target with transformations.

Session 4: Business Glossary Administration
- **Topics:**

  - o Understanding Catalogs and Their Structure

  - o Defining and Managing Business Terms

  - o Establishing Business Policies and Rules

  - o Creating Custom Fields

  - o Leveraging AI Match for Term Suggestions

  - o Developing MindMaps for Data Relationships

- **Assignment:**

  - o Project: Build a business glossary with terms, policies, and MindMaps.

Session 5: Data Marketplace Administration
- **Topics:**

  - o Speed Up Data Discovery

  - o Search and View Results

    - ▪ Search options

- - - Filter options

    - - Add Favorites

    - - Ratings

  - o Find AI Models

  - o Compare Assets

  - o Automatic Scoring of Data

  - o Create an issue and assigning to a steward

  - o Create a request for access and assigning to a steward

  - o Rate and Review / Collaborate

- **Assignment:**

  - o Exercise: Search and compare data assets for a given dataset.

Session 6: Data Discovery
- **Topics:**

  - o Introduction to Data Discovery

  - o Search and Find Data

    - - Search options

    - - Filter options

    - - Add Favorites

- **Assignment:**

  - o Exercise: Search for specific business and technical data using various methods.

Session 7: Integration and Best Practices
- **Topics:**

  - o Integrating Erwin DI Tools with Other Systems

  - o Best Practices in Data Governance Using Erwin DI

  - o Troubleshooting Common Issues

- **Assignment:**

  - o Research Paper: Propose a data governance strategy utilizing Erwin DI tools.

Additional Resources:

- **Erwin DI Community Forums:** For peer support and knowledge sharing.

- **Tutorial Videos:** Access to a library of instructional videos on Erwin DI functionalities.

- **Office Hours:** One-on-one assistance during scheduled office hours or by appointment.

This course is designed to provide hands-on experience with erwin Data Intelligence tools, equipping students with the skills needed to effectively manage and govern data assets within an organization. Through practical assignments and collaborative projects, participants will develop a deep understanding of data intelligence processes and best practices.