erwin Data Modeler Suite, Workgroup Edition, and ER360 Knowledge Transfer

Overview

The erwin Data Modeler (DM) Suite, Workgroup Edition, and ER 360 Knowledge Transfer service is a prepackaged bundle of workshops designed to facilitate foundational training sessions covering the erwin Data Modeler Suite 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 delivery schedule, venue, and agendas
- Knowledge Transfer: Delivery of foundational training workshops covering the purchased product components

The erwin Professional Services Consultants ensure enablement of Customer users and selected stakeholders on the erwin DM Suite components and related functionality, and ensure sufficient initial knowledge transfer to allow the immediate utilization of the erwin Data Modeler capabilities. The erwin consultants will also work closely with Customer IT and business teams to properly plan the training environment and settings prior to solution deployment. By leveraging Quest methodologies and expert guidance through the entire implementation processes, the end user teams will rapidly gain knowledge and start utilizing the erwin Data Modeling solution to the full capacity.

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
- 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

Activities Description

An erwin 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

erwin 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

Design Phase

erwin Services Consultant(s) will host one workshop with the Customer team to document the planned workshop attendees, structure, and delivery timing:

- Review predefined session agendas
- Align targeted attendees to sessions
- Define delivery method
- Review Resource availability

Knowledge Transfer Phase

erwin Services Consultant(s) will host multiple 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

erwin Professional Services will provide a prerequisites document two weeks before the engagement. This details various customer dependencies. This must be reviewed, completed, and communicated back with erwin. Failure to complete these prerequisites as well as any prerequisites, conditions, limitations, or assumptions listed herein 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 knowledge transfer services is on workshop per purchased DM 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 40 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 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.

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SKU

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

Appendices

Appendix A – erwin DM Suite Knowledge Modules

Erwin Data Modeler

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
- Building and Editing
    - Entities, Attributes and Keys
    - Relationships

Presentation of the Model
- Subject Areas and Diagrams
- Themes (font, color, highlights, etc…)

Applying Standards
- Domains
- Validation Rules
- Naming Standards
- Data Type Standards
- User-Defined Properties
- Templates

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

Transforms
- Super-Type/Sub-Type Roll Up and Roll Down
  - Denormalization
    - Horizontal Partition
    - Vertical Partition
    - Column Linking

RI Triggers, Stored Procedures, Scripts
Volumetrics
Database Views
- Model Database views
- Modify a view

Data Warehousing Introduction
- Dimensional Modeling
- Data Movement
- Source-to-Target Mapping

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

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

General Mart Concepts
- Incorporating the Mart into your Modeling Life Cycle
  - Check In/Out
  - Managing Conflicts
  - Managing Versions
  - Refreshing a Model

Promoting standards and reuse
- Managing Standards
- Templates and Source Models

Reporting
- Mart and cross-model reports

- Diagrams
- Report Designer

erwin ER360 Administrator

- Administer and manage erwin ER360
- Harvest models from erwin Mart repository
- Create harvesting schedules from Mart
- Manage users
- Manage privileges/permissions via profiles
- Manage Catalogs
- Create Views
- Managing Indexing and portal settings
- Home Page

erwin ER360 End User

- Browse meta-data in the portal
  - Metadata
  - Diagrams
    - PK & FK representation
    - Role names, AK
    - SDI tagging
- Navigate models
- Working with shared Views
- Enterprise Architecture Diagram
- Collaboration & Comments
- Data flow Impact Analysis and column tracing