Ignite for Collibra Platform and Data Quality Datasheet

Project objectives

Customer is seeking support for their initial implementation and adoption within the first 12 months of the Collibra Platform (CP) and Data Quality (DQ). The **Ignite for CP** implementation phase will support the establishment of a Collibra Catalog utilizing up to three supported data sources and one supported Business Intelligence (BI) source, and Business Glossary. The **Ignite for DQ** implementation phase will focus on enabling the initial use case for Data Quality, using it as a foundation to transfer knowledge and best practices and to empower Customer for broader adoption of the platform. In addition, both the **Ignite for CP and Ignite for DQ** adoption phases will support the Collibra implementation and help Customer leverage the product for multiple use cases as a means of transferring knowledge and best practices to Customer for continuing, extended use of the platform. Collibra will work with Customer to jointly establish the overall engagement plan with both short and longer-term priorities.

implementation phase

Collibra resource scheduling

Ignite Platform	Implementation calendar weeks	Enterprise Architect schedule	Implementation Manager schedule
Collibra Platform	**Prepare 1-2 Implementation 3-14**	Up to 2 half days per week	Up to 2 hours per week
Data Quality	**Prepare 14-15 Implementation 16 - 27**	Up to 2 half days per week	Up to 2 hours per week

In-scope activities and schedule for Collibra Platform

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Initial communication	Prepare week 1	- Receive welcome email - Review workbook and prerequisites - Organize appropriate resource(s)	- Send welcome email - Attach workbook - Schedule briefing call
Briefing/intro call	Prepare week 2	- Project Manager and/or key stakeholder attend briefing call - Be prepared to discuss: - Project expectations - Project scope - Weekly status call schedule - Two-times-a-week workshop schedule Note: The first workshop will be the technical prerequisites for Edge, Single Sign-On (SSO), and source registration followed by the project kickoff	- Provide project expectations - Discuss project scope - Schedule weekly status calls - Schedule two times a week workshop sessions - Provide workshop definitions

Phase/Task	Timeline	Customer responsibility	Collibra responsibility

Technical prerequisites workshop	Prepare week 2	• CP Lead, Platform Administrator, Identity Provider Administrator, Network Engineer, Information Security (InfoSec) representative, Collibra System Administrator, Database Administrator attend prerequisite workshop
		• Be prepared to discuss:
		  o Edge prerequisites for infrastructure and installation
		  o SSO/System for Cross-domain Identity Management (SCIM) prerequisites
		  o Catalog and BI registration prerequisites
			• Conduct workshop
			• Provide Edge infrastructure prerequisites
			• Provide SSO/SCIM prerequisites
			• Provide Catalog and BI Registration prerequisites

Kickoff	Implementation week 1	• Key stakeholders, project team members, and the Executive sponsor participate in the kick-off session	Conduct workshop, including: • Team introductions • Collibra overview (quick demo) • Review scope • Review the plan/scheduling
Review Customer business requirements workshop	Implementation week 1	• Attend workshop • Provide initial use case and business requirements document • Present use case(s) and requirements • Answer questions	• Conduct workshop • Ask questions to ensure in-depth understanding of use case(s) and requirements • Provide input and recommendations as needed
Education	Implementation weeks 1 - 5	• Schedule and participate in instructor-led training using included Education Credits (see Datasheet)	Conduct required instructor-led training as described in the Collibra Ignite workbook: • Collibra basics • Asset governance • Register data • Creating an asset model • Creating a metamodel
System overview workshop	Implementation week 2	• Learn the basic components of the Collibra Console and the Collibra Platform settings	• Conduct workshop • Configure your non-production instance for Ignite • Provide an overview of the Collibra Console and CP settings

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Define project requirements workshop	Implementation week 2	• Review the refined use case and business requirements based on the scope of Ignite implementation phase	• Review and update requirements document for in-scope for implementation and adoption phases • Review the refined use case and business requirements based on the scope of Ignite implementation phase
Access management configuration workshop	Implementation week 3	• Perform Authentication Setup (SSO)	• Conduct workshop • Help Customer setup authentication (SSO)
Approve project requirements workshop	Implementation week 3	• Approve the refined use case and business requirements based on the scope of Ignite implementation phase	• Approve the refined use case and business requirements based on the scope of Ignite implementation phase
Install Edge workshop (Option 1)	Implementation week 3	• Perform Edge installation and configuration	• Guide Customer through Edge installation and configuration
Register datasources workshop 1 (Option 1)	Implementation week 4	• Confirm network and authorization prerequisites have been met • Configure connection to datasource(s) • Run ingestion of data source(s)	• Conduct workshop • Guide Customer to configure connection to datasource(s) • Guide Customer to run ingestion of datasource(s)
Register datasources workshop 2 (Option 1)	Implementation week 4	• Attend workshop • Confirm network and authorization prerequisites have been met • Configure connection to datasource(s) • Run ingestion of data source(s)	• Conduct workshop • Guide Customer to configure connection to datasource(s) • Guide Customer to run ingestion of datasource(s)
Alternate data ingestion workshop 1 (Option 2)	Implementation week 4	• Attend workshop • Provide prepared data extracts • Prepare data ingestion template(s) • Populate data ingestion template • Import data using the data ingestion template	• Conduct workshop • Guide Customer to create data ingestion template(s) • Guide Customer on populating data ingestion template(s) • Guide Customer to import data using the data ingestion template

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Alternate data ingestion workshop 2 (Option 2)	Implementation week 4	• Attend workshop • Provide prepared data extracts • Prepare data ingestion template(s) • Populate data ingestion template • Import data using the data ingestion template	• Conduct workshop • Guide Customer to create data ingestion template(s) • Guide Customer on populating data ingestion template(s) • Guide Customer to import data using the data ingestion template
Register BI tool workshop (Option 1)	Implementation week 5	• Attend workshop • Confirm network and authorization prerequisites have been met • Configure connection to BI datasource • Run ingestion of BI data source	• Conduct workshop • Guide Customer to configure connection to BI datasource • Guide Customer to run ingestion of BI datasource
Alternate ingestion of BI workshop (Option 2)	Implementation week 5	• Attend workshop • Provide prepared data extracts • Prepare data ingestion template(s) • Populate data ingestion template • Import BI data using the data ingestion template	• Conduct workshop • Guide Customer to create data ingestion template(s) • Guide Customer on populating data ingestion template(s) • Guide Customer on importing data using the data ingestion template
Catalog and technical lineage overview workshop	Implementation week 5	• Attend workshop • Learn to use technical lineage • Learn the difference between business and technical lineage • Learn how to use the Catalog • Review Catalog components	• Conduct workshop • Guide Customer to learn about business and technical lineage, Catalog and Catalog components
Asset type workshop	Implementation week 6	• Attend workshop • Identify prioritized use cases Ignite implementation (e.g., Business Glossary, Data Dictionary) • Complete "Before Operating Model" training • Provide sample metadata for business terms and key performance indicators (KPIs) • Optional: Have available any existing glossaries or other artifacts that will be managed in Collibra to help identify potential asset types	• Conduct workshop • Guide Customer reviewing asset model building blocks and operating model components • Help Customer to identify asset types to configure in Collibra (e.g. business/technical assets, various data asset types) • Review sample metadata for business terms and KPIs to verify requirements • Create first draft of asset model diagram

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Attribute and relations workshop	Implementation week 6	• Attend workshop • Provide any existing glossaries or other artifacts that will be managed in Collibra to help identify potential asset types	• Conduct workshop • Guide Customer reviewing concepts of attribute types and relation types • Help Customer to identify attribute types needed for each of the asset types identified in the previous session • Guide Customer to identify relation types between asset types identified in the previous session
Communities and domains workshop	Implementation week 7	• Attend workshop • Provide any existing any information related to ownership and stewardship model (current or desired)	• Conduct workshop • Help Customer to understand purpose and features of communities and domains and initial structure for Ignite implementation phase • Help Customer to determine whether the initial structure should be updated to fit your organization • Guide Customer to Document list of communities and domains that meet their needs
Operating model configuration workshop	Implementation week 7	• Attend workshop • Complete follow-up work from Attributes and relations workshop and Communities and domains workshop	• Conduct workshop • Review and validate the draft metamodel diagram with Customer • Complete configuration of asset types, attribute and relation types, communities and domains

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Glossary and KPI workshop	Implementation week 8	• Attend workshop • Identify and prepare business terms that need to be loaded using excel or csv formats • Identify and prepare any KPI and measures that needs to be loaded using excel or csv formats • See Ignite workbook for more details on pre-work	• Conduct workshop • Explain why we need a business glossary and how it will work in Collibra • Help Customer to load a glossary template as initial set of terms and learn import export process • Making the bridge between data and business by providing context on data • Help Customer to understand why we need KPIs and metrics • Load KPI template as initial set of KPIs • Making the bridge between reports and KPIs
Roles and responsibilities workshop	Implementation week 8	• Attend workshop • Identify one or more individuals who will be responsible for managing role assignment for each top-level community	• Conduct workshop • Help Customer to understand how users and groups are created in Collibra • Explain why we need roles and the primary resource roles that will be utilized • Review Customer's initial role permissions and tasks
Progress review workshop	Implementation week 9	• Attend workshop • Come with questions and areas that need clarification from previous workshops	• Conduct workshop • Answer questions on the Collibra configuration up until this point
Collaboration workshop 1	Implementation week 9	• Attend workshop	• Conduct workshop • Explain why and how collaboration is adding value to your data program • Enable the Collibra features needed for collaboration (review out-of-the-box (OOTB) workflows) • Explain how to use the OOTB workflows to accelerate collaboration to the next level • Do a walkthrough of each Ignite workflow and configure the workflow definition page • Discuss asset statuses • Explain how to promote/approve assets

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
User experience workshop 1	Implementation week 10	• Attend workshop • Supply some dashboard customization requirements	• Conduct workshop • Explain how traceability diagrams work and can be configured to show different types of assets based on defined relations • Explain different widgets available for the dashboard configurations • Demonstrate Collibra Everywhere browser extension
Collaboration workshop 2	Implementation week 10	• Attend workshop	• Conduct workshop • Continue from Collaboration workshop 1 • Explain why and how collaboration adds value to your data program • Enable the Collibra features needed for collaboration • Explain how to use OOTB workflows to accelerate collaboration to the next level • Do a walkthrough of each Ignite workflow and configure the workflow definition page • Discuss asset statuses • Explain how to promote/approve assets
User experience workshop 2	Implementation week 11	• Attend workshop • Supply some dashboard customization requirements	• Conduct workshop • Explain how traceability diagrams work and can be configured to show different types of assets based on defined relations • Explain different widgets available for the dashboard configurations • Demonstrate Collibra Everywhere browser extension
Final configuration workshop	Implementation week 11	• Attend workshop • Come with any outstanding requirements needed for the implementation use case	• Conduct workshop • Help Customer to apply any changes required to enable the completion of the implementation use case

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Business requirements review	Implementation week 12	• Attend Workshop • Prepare to review the Implementation Use Case requirements.	• Conduct Workshop • Prepare to review the Implementation Use Case requirements.
Review and planning call	Implementation week 12	• Attend Workshop • Reflect on your Ignite journey and be prepared to provide input • Provide further use cases for the Adoption Phase (Premier and Ultimate only)	• Conduct Workshop • Reflect on the Implementation phase • Review Ignite accomplishments and lessons learned

In-scope activities and schedule for Data Quality

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Initial communication	Prepare week 1	• Receive welcome email • Review workbook and prerequisites • Organize appropriate resource(s)	• Send welcome Email • Attach workbook • Schedule briefing Call

Briefing/intro call	Prepare week 2	• Project Manager and/or key stakeholder attend the briefing call
		• Be prepared to discuss:
		   o Project expectations
		   o Project scope
		   o Schedule weekly status calls
		   o Schedule two times a week workshop sessions
		• Note: The first workshop will be the technical prerequisites for DQ, Single Sign-on (SSO), and source registration followed by the project kickoff
			• Provide project expectations
			• Discuss project scope
			• Schedule weekly status calls
			• Schedule two times a week workshop sessions
			• Provide workshop definitions

Phase/Task	Timeline	Customer responsibility	Collibra responsibility

Technical prerequisites workshop	Prepare week 2	• DQ Lead, Platform Administrator, Identity Provider Administrator, Network Engineer, InfoSec representative, Collibra System Administrator, Database Administrator attend prerequisite workshop
		• Be prepared to discuss:
		  ○ Data Quality prerequisites for infrastructure and installation
		  ○ SSO prerequisites
			• Conduct workshop
			• Provide DQ infrastructure prerequisites
			• Provide SSO prerequisites
			• Ensure Customer has the License key and GCR repo key for installation

Kickoff	Implementation week 1	• Key stakeholders, project team members, and the Executive sponsor participate in the kick-off session	Conduct workshop, including: • Team introductions • Collibra overview (quick demo) • Review Scope • Review the plan/scheduling
Review Customer business requirements	Implementation week 1	• Attend workshop • Provide initial use case and business requirements document • Present use case(s) and requirements • Answer questions	• Conduct workshop • Ask questions to ensure in-depth understanding of use case(s) and requirements • Provide input and recommendations as needed
Education	Implementation weeks 1 - 5	• Schedule and participate in instructor-led training using included Education Credits (see Datasheet)	Conduct required instructor-led training as described in the Collibra Ignite workbook: • DQ profiling and insights • DQ adaptive rules • DQ custom rules • DQ dataset management • DQ administrator and security
Define project requirements	Implementation week 2	• Attend workshop • Review the refined use case and business requirements based on the scope of Ignite implementation phase	• Conduct workshop • Review and update requirements document for in-scope for implementation and adoption phases • Review the refined use case and business requirements based on the scope of Ignite implementation phase

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
Install DQ workshop 1	Implementation week 2	• Attend workshop • Configure servers/VM or k8s clusters with required specifications • Ensure network firewalls are open • Procure DQ install package and license key	• Conduct workshop • Assist with Collibra DQ installation and Agent configuration • Troubleshoot installation issues • Assist with execution of sample DQ jobs
Approve project requirements workshop	Implementation week 3	• Attend workshop • Approve the refined use case and business requirements based on the scope of Ignite implementation phase	• Conduct workshop • Approve the refined use case and business requirements based on the scope of Ignite implementation phase
Install DQ workshop 2	Implementation week 3	• Attend workshop • Configure servers/VM or k8s clusters with required specifications • Ensure network firewalls are open • Procure DQ install package and license key	• Conduct workshop • Assist with Collibra DQ installation and agent configuration • Troubleshoot installation issues • Assist with execution of sample DQ jobs
Connect datasources workshop 1	Implementation week 4	• Attend workshop • Capture connection details for all in-scope source systems • Configure service accounts and security roles as needed	• Conduct workshop • Assist with configuring data sources in Collibra DQ • Run DQ checks to verify installation and agent configuration
Connect datasources workshop 2	Implementation week 4	• Attend workshop • Capture connection details for all in-scope source systems • Configure service accounts and security roles as needed	• Conduct workshop • Assist with configuring data sources in Collibra DQ • Run DQ checks to verify installation and agent configuration
Initial DQ users, groups and security configuration workshop	Implementation week 5	• Attend workshop • Decide on SSO/LDAP configuration for user creation • Define governance structure for roles and responsibilities • Identify the organization structure that will be adopted and the roles that will be implemented	• Conduct workshop • Assist with enabling SSL and implementing RBAC, SSO, or AD/LDAP • Guide through creating users and user groups • Enable SSO integration for DQ web • Established optional additional External Group to DQ roles (OOTB or custom) mapping

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
DQ functional overview workshop	Implementation week 5	• Attend workshop • Review identified business use cases and understand business data issues • Define business rules for dataset configurations	• Conduct workshop • Present Collibra DQ functional overview • Demonstrate key platform features and DQ implementations
Build DQ Job workshop	Implementation week 6	• Attend workshop • Ensure DQ connection to source systems is established • Identify datasets and business rules for DQ jobs	• Conduct workshop • Guide on creating first DQ job and running it • Help access job status and review job outputs
DQ profile, shape and behavioral dimensions workshop	Implementation week 6	• Attend workshop • Review pre-identified business use cases and dataset profiling • Schedule DQ job for profiling	• Conduct workshop • Demonstrate profiling, behavioral modeling, and sensitivity tuning
Build DQ rules workshop	Implementation week 7	• Attend workshop • Identify business rules for setup on datasets	• Conduct workshop • Assist in creating simple SQL-based rules and implementing complex rules with joins
DQ duplicate dimensions workshop	Implementation week 7	• Attend workshop • Review the pre-identified business use cases for the proof of value • Review any profiling results on the data set to be considered for the duplicate dimension workshop	• Conduct workshop • Configure duplicate detection on datasets • Tune the fuzzy duplicate detection
DQ outliers and record dimensions workshop	Implementation week 8	• Attend workshop • Review the pre-identified business use cases for the proof of value • Review any profiling results on the data set to be considered for the outlier dimensions workshop • Schedule DQ job with rules dimension on dataset of interest to build the Behavioral model	• Conduct workshop • Implement outlier and record dimensions on datasets • Review results

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
DQ pattern dimensions workshop	Implementation week 8	• Attend workshop • Review the pre-identified business use cases for the proof of value • Review any profiling results on the data set to be considered for the dimension workshop • Schedule DQ job with rules dimension on dataset of interest to build the Behavioral model	• Conduct workshop • Look for uncommon patterns across columns using relationships (the pattern dimension) • Access the Collibra DQ platform and Create dataset(s) to enable pattern dimension to detect any anomalies in datasets
DQ source and schema dimension workshop	Implementation week 9	• Attend workshop • Multiple datasets are identified which are loaded with comparable data but using different processes • A dataset object has been modified to add additional columns and rename existing columns	• Conduct workshop • Use two different datasets to reconcile data between them (the source dimension) and review observations • Configure and review any change in underlying database objects table structure (the schema dimension)
DQ dataset management and assignments workshop	Implementation week 9	• Attend workshop • Configure multiple users to assign DQ observations • Review OOTB Data Class Library to be associated with your dataset • Plan business units and sub-units to configure in DQ, under which datasets can be tagged • Profiling is enabled on dataset and DQ jobs executing continuously	• Conduct workshop • Demonstrate how to validate and resolve DQ issues • Help use Dataset Manager to categorize datasets
Progress review workshop	Implementation week 10	• Attend workshop • Provide feedback on current implementation progress, share blockers and success stories	• Conduct workshop • Facilitate structured review, share metrics and observations, propose next steps and implementation roadmap
Review SSO users/roles/ groups and permissions workshop (Optional)	Implementation week 10	• Attend workshop • Revisit security requirements and validate correct implementation across environments	• Conduct workshop • Support with current configuration review and recommend adjustments based on best practices

Phase/Task	Timeline	Customer responsibility	Collibra responsibility
DQ reporting and alerts workshop	Implementation week 11	• Attend workshop • Various Rules and dimension are configured on datasets to trap bad records • Profiling is enabled on dataset and DQ jobs executing continuously • SMTP Server details are available to generate email notifications	• Conduct workshop • Review Collibra DQ's in-built completeness, findings and profile reports • Use in-built scorecards and pulse reports • Provide overview on custom dashboard using meta-store hosted metadata • Configure dataset run alerts
DQ APIs workshop	Implementation week 11	• Attend workshop • Have access to DQ APIs via Swagger/Postman	• Conduct workshop • Provide the detailed review of Collibra DQ's REST APIs for automation and integrations
DQ and Collibra Platform integration workshop (Optional)	Implementation week 12	• Attend workshop • DQ scans and related Rules are configured on datasets to trap bad records • Similar assets/datasets have been ingested in CP side Catalog • Required Prerequisites are completed within the Collibra platform	• Conduct workshop • Review Collibra Platform and DQ Integration to achieve quality metrics within one Collibra platform • Understand prerequisites of CP Integration setup Configure and enable integration to sync DQ Scan results in CP • Configure DQ Scans with DQ Rules and validate these metrics within CP
Final environment and business requirements review	Implementation week 12	• Attend workshop • Validate final environment setup • confirm business requirement document against implemented features	• Conduct workshop • Facilitate business requirement review • Validate environment readiness; • Address open configuration or scope gaps
Stage 1 review and planning call	Implementation week 12	• Attend workshop • Review accomplishments of initial implementation • Share feedback and align on adoption goals and priorities	• Present summary of Stage 1 work • Define adoption scope, timelines, and key activities with Customer

Adoption phase

Collibra resource scheduling

Ignite Platform	Ignite calendar weeks	Enterprise Architect schedule	Implementation Manager schedule
Collibra Platform	**15-52**	Up to 1 half day/week	Up to 1 hour/week
Data Quality	**28-52**	Up to 1 half day /week	Up to 1 hour/week

Typical adoption activities for Collibra Platform

Typical adoption activities will vary. Activities depend on the Customer priorities, Ignite package procured, and by the time allocated for the Collibra Enterprise Architect per the "Collibra Resource Scheduling" table above.

Planning		
Phase/Task	Customer responsibility	Collibra responsibility
Establish the plan for the year, including both periodic and ongoing activities	• Provide internal use cases • Participate in planning • Participate actively in quarterly reviews	• Develop the plan for the adoption phase to align with Customer's roadmap • Regular reviews and updates of plan

Design		
Phase/Task examples	Customer responsibility	Collibra responsibility
Collibra Technical design	• Provide relevant environmental information for design activities • Participate in design sessions	• Help design the Collibra technical solution for specific use case(s) and other periodic support activities

Best Practices

Phase/Task examples	Customer responsibility	Collibra responsibility

Instill best practices into Customer's Collibra team way of working	• Participate in best practice sharing sessions
	• Implement recommended, relevant best practices, with Collibra guidance
		• Share best practices for configuration, performance and end user experience
		• Provide continuous review on new use cases
		• Provide guidance and development support on Collibra topics such as:
		   ○ Catalog and Glossary
		   ○ Native connectors for metadata ingestion; using the Collibra Application programming interface (API)
		   ○ SSO / LDAP configuration
		   ○ Business / technical lineage and diagrams
		   ○ Workflows

Knowledge acceleration

Phase/Task examples	Customer responsibility	Collibra responsibility
Share knowledge and coach Customer team	• Work with Collibra on architecture • Identify individuals working towards Ranger certification • Suggest topics for and attend "brown-bag," or other open office sessions	Work with Customer resources as a primary technical advisor, providing guidance on: • Reference architecture and guidance • Provide coaching to help team members achieve Ranger certification • Conduct periodic "brown-bag" or other open office-type sessions

Adoption support

Phase/Task examples	Customer responsibility	Collibra responsibility
Provide guidance and examples of successful Collibra adoption tools, approaches, and methods	• Participate in adoption workshop • Implement adoption oriented Collibra capabilities with Resident Architect guidance • Participate in Collibra roadmap session(s)	• Conduct an adoption recommendations workshop • Involvement in specific adoption-related initiatives (like dashboard design) • Support initiatives leveraging Collibra user experience features for increased adoption • Preview upcoming Collibra roadmap release detail and map new features to your planned use cases

Operational excellence		
Phase/Task examples	Customer responsibility	Collibra responsibility
Proactive review, assessment, and recommendation activities	• Run Operating Model Diagnostic workflow • Participate in review sessions	• Periodic Operating Model Diagnostic recommendations • Other assessment and recommendation activities such as a Health Check, Program Assessment or 360° Assessment

Typical adoption activities for Data Quality

Typical adoption activities will vary. Activities depend on the Customer priorities, Ignite package procured, and by the time allocated for the Collibra Enterprise Architect per the "Collibra Resource Scheduling" table above.

Planning		
Phase/Task	Customer responsibility	Collibra responsibility
Establish the plan for the year, including both periodic and ongoing activities	Provide internal use cases; participate in planning; participate in quarterly reviews	Develop the plan for the adoption phase to align with Customer's roadmap; conduct regular reviews and updates of plan

Design		
Phase/Task examples	Customer responsibility	Collibra responsibility
Further use cases	Identify new business areas; define intake criteria; prioritize based on business needs	Assist with intake framework design; recommend data sets; validate technical feasibility
CICD pipeline automation	Define environments, standards, and deployment cadence	Provide pipeline templates; guide integration with existing tools
Remediation framework design	Define business rules and approval workflows for issue remediation	Design integration with ServiceNow; provide remediation architecture blueprint
Additional environment setup	Request new environments; provide infrastructure access and specs	Provision new DQ instance/environment; validate config and security

Best Practices

Phase/Task examples	Customer responsibility	Collibra responsibility
Rightsize DQ coverage	Share current business priorities and data volume expectations	Recommend scope balancing (deep vs broad coverage); provide tuning guidance
Pipeline automation	Share current ingestion and validation approach	Share patterns for automated triggers and batch processing
Third-party rules migration	Share rule library and intent; prioritize critical rules	Map and migrate rules; validate against migrated data and expected results

Knowledge acceleration

Phase/Task examples	Customer responsibility	Collibra responsibility
Education and awareness initiatives	Nominate DQ champions; organize internal learning events	Deliver enablement sessions; share communication templates for awareness campaigns
Build communities and champions	Engage business and technical users; define recognition plan	Provide champion program framework; host Q&A/Office Hours sessions

Adoption support

Phase/Task examples	Customer responsibility	Collibra responsibility
Productionize intake	Share updates on newly onboarded data sets and owners	Review data set readiness; support deployment and onboarding
Raise the profile of Data Quality to be an organization-wide effort	Align with data governance leadership	Provide artifacts and examples of org-wide comms; support with exec briefings
Recognize key DQ processes and people	Identify internal DQ stakeholders and processes	Validate operating model; recommend roles and responsibilities

Operational excellence		
Phase/Task examples	Customer responsibility	Collibra responsibility
Keep up with product updates and education	Track release notes; participate in DQ community calls	Share product roadmap, releases, and impact summary; notify of important updates
Custom reporting and dashboards	Define metrics and visualization needs; validate reports	Design templates and reusable components; assist in building and testing dashboards
APIs usage for triggers and migrations	Share integration points and intended use cases	Provide API documentation and examples; assist in automation enablement

Out of scope

All tasks not detailed in the relevant IN-SCOPE section above are considered out of scope, including:

1. Organizational change management activities such as communication planning, organizational design, or role mapping
2. Program management is the responsibility of the Customer including all communication with the steering committee
3. Any development of Collibra Java API or REST API
4. Any custom application development or integration
5. Design, configuration, and implementation of high availability or disaster recovery environments
6. Installation, configuration, use, or administration of any third-party software not provided by Collibra
7. Use of third-party test automation software or test automation expertise
8. Database administration responsibilities include configuration or administration of database servers and database software
9. Knowledge of third-party software APIs and interface mechanisms
10. Custom report development using third-party tools
11. Extraction of data from the source systems not supported by Edge
12. Connectivity to non-supported Data Quality data sources

Assumptions

1. Customer is responsible for preparing the recommended infrastructure for installation. For additional information, see the Edge Configuration Guide (Collibra Platform) or Data Quality Installation (Data Quality). Any delay to this activity will require an alternative approach to data ingestion
2. The following describes the scheduling of Collibra personnel for the duration of the engagement:
    - Block-scheduled: Collibra personnel are scheduled in advance for the entire engagement period
    - Half-day allocation: Each scheduled block represents a half-day of Collibra personnel time
    - Weekly expiration: These half-day blocks expire on a weekly basis
    - Customer-facing and non-Customer-facing activities: The scheduled time includes both Customer-facing activities and non-Customer-facing activities
3. Customer will provide information and/or access as requested by Collibra for analysis, design, and integration, as needed during the project
4. Collibra consultants will make maximum use of out-of-box product capabilities
5. The contract expiration is twelve (12) months from the Order Effective Date Collibra shall not be obligated to perform any Professional Services or provide any Deliverables after this expiration

6. For the implementation phase:
   - Connect up to three supported Metadata Integrations via <u>Edge</u>, and one <u>supported BI tool</u> (Collibra Platform)
   - Connect up to 2 <u>supported data sources</u> (Data Quality)
7. Single Sign On set-up will be provided for:
   - One of the supported <u>SSO types</u>, and/or <u>SCIM</u> for Collibra Platform
   - One of the supported <u>SAML-supported solutions</u> for Data Quality
8. Customer will provide timely Collibra remote access to the environments in-scope
9. Customer will secure and provide timely access to data, documentation, systems, and facilities necessary to complete all tasks
10. Customer will ensure that all relevant participants are informed, scheduled, and available for their parts of the agreed project plan
11. Collibra will provide services on licensed Collibra products and functionality only
12. Remote delivery is assumed unless mutually agreed upon otherwise