

Rapid Start *Elevate* for Data Quality Datasheet

Project Objectives

Customer is seeking support for their initial implementation of Collibra Data Quality. This program will support the implementation of Collibra DQ and leverage the product to initiate work on a first use case as a means of transferring knowledge and best practices with the Customer for their further, extended use of the platform.

In Scope

Phase/Task	Customer responsibility	Collibra responsibility
Kickoff	<ul style="list-style-type: none"> Complete use case identification exercise and share with Collibra. Identify data sources to be scanned, data volume and concurrency requirements. Participate in kick-off session with key stakeholders. 	<ul style="list-style-type: none"> Conduct Kick-off session. Plan and review DQ Platform compute, capacity, and architecture requirements.
DQ install	<ul style="list-style-type: none"> Review Collibra DQ architecture and various installation offerings (distributed/cloud-native/multi-tenant). Configure servers/VM or clusters to install DQ with pre-defined requirements (e.g., operating systems, storage, cores, etc.) Open required network firewalls. Prepare all technical prerequisites. Procure full DQ install package and license keys 	<ul style="list-style-type: none"> Ensure full DQ install package and license keys are procured. Conduct DQ Installation overview and confirm prerequisites are met. Assist with Collibra DQ installation and agent configuration.
DQ connectivity	<ul style="list-style-type: none"> Capture connection details for in-scope source systems. Establish DQ connection to source systems. 	<ul style="list-style-type: none"> Assist with data-source configuration. Run multiple DQ Checks on agreed data sets to verify installation and agent configuration.
DQ functional overview	<ul style="list-style-type: none"> Participate in the DQ functional overview activities. 	<ul style="list-style-type: none"> Review identified business use cases for proof of value. Analyze business data sets, business rules and current DQ-related issues. Present Collibra DQ functional overview and approach to Data Quality. Demonstrate key platform features and how to implement them.

Phase/Task	Customer responsibility	Collibra responsibility
Build DQ job	<ul style="list-style-type: none"> Establish DQ connection to source systems Identify source dataset on which DQ job can be run. Identify business rules to be set up on datasets. 	<ul style="list-style-type: none"> Create First DQ job and demonstrate how to create data set, define data set scope, perform Back Runs and review DQ command line to submit jobs. Demonstrate DQ job and findings page for reading DQ job run output. Demonstrate and explore using APIs to submit DQ jobs
DQ dimensions	Review identified use cases and profiling results on data set to be considered for Dimensions workshop.	Introduce various Collibra DQ Dimensions in detail and review suitability for nominated use cases.
DQ profile, shapes & behavioral dimensions	<ul style="list-style-type: none"> Review identified use cases and profiling results on a data set to be considered for the workshop. Schedule DQ job with Profile dimension on data set of interest to build the behavioral model. 	<ul style="list-style-type: none"> Demonstrate the adaptive rules (AR) generated from the Behavior dimension. Review options to customize (manual, suppress) ARs and retrain the dataset. Demonstrate the Shapes dimension and check for unexpected text formats. Review data set profiling result with the Customer
DQ rules dimensions	Participate in DQ rules activities.	<ul style="list-style-type: none"> Create Simple (Null Check) and Freeform (Validity) SQL based Rules. Assist with rules implementation considering specific use cases.
DQ duplicate dimensions	Review identified use cases and profiling results on data set to be considered for Duplicate Dimensions workshop.	<ul style="list-style-type: none"> Configure datasets to scan for exact or fuzzy match duplicates Review options for tuning fuzzy duplicate detection
DQ Outlier & Record Dimensions	<ul style="list-style-type: none"> Review identified use cases and profiling results on data set to be considered for Outlier Dimensions workshop. Schedule DQ job with Profile dimension on dataset of interest to build the behavioral model. 	<ul style="list-style-type: none"> Assist with outliers implementation considering specific use cases. Check for atypical numerical and categorical values (outliers dimension) Confirm persistence of key values (record dimension) and detect common records that drop out of dataset.
DQ Pattern Dimensions	<ul style="list-style-type: none"> Review identified use cases and profiling results on a data set to be considered for the workshop. Schedule DQ job with profile dimension on dataset of interest to build the behavioral model. 	<ul style="list-style-type: none"> Assist with patterns implementation considering specific use cases. Look for uncommon patterns across columns using relationships (pattern dimension)

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DQ Source and Schema Dimensions	<ul style="list-style-type: none"> Identify multiple datasets loaded with comparable data. Modify a dataset object to add additional columns and rename existing columns. 	<ul style="list-style-type: none"> Configure and review any change in underlying database objects table structure (Schema dimension) Reconcile data between 2 data sets (source dimension) and review observations.
DQ Dataset Management & Assignments	<ul style="list-style-type: none"> Configure multiple users to assign DQ observations. Review OOTB Data Class Library to be associated with your dataset. Plan Business Units and Subunits to configure in DQ, under which datasets can be tagged. 	<ul style="list-style-type: none"> Use Collibra DQ's Dataset Manager feature in conjunction with Data Categories and Data Classes to uncover underlying PI and different Data Domains. Demonstrate how to validate/resolve DQ issue(s) on data set(s).
DQ Reporting & Alerts	<ul style="list-style-type: none"> Configure rules and dimensions on datasets to trap bad records. SMTP Server details are available to generate email notifications. 	<ul style="list-style-type: none"> Review Collibra DQ's in-built Completeness, Findings and Profile reports. Review built-in scorecards and reports with the Customer to understand data quality observations. Create a custom dashboard using meta-store hosted metadata about business data. Configure data set run alerts.
DQ users, groups, and security	<ul style="list-style-type: none"> Review Collibra DQ Security and RBAC Model. Identify the governance structure to implement (roles, responsibilities, users, groups). Determine if SSO/LDAP will be configured for creating Users in Collibra DQ. Identify the organization structure that will be adopted and the roles that will be implemented. Provision SSL Certificates (Self signed or CA Issued). 	<ul style="list-style-type: none"> Review manual creation of CDQ users/user groups. Assist in setting up SSO/LDAP in CDQ application based of IDP required configurations. Assist in mapping IDO External Groups with CDQ's Roles. Advise on CDQ Security configuration.
DQ Roles and Responsibilities Workshop	Identify the organization structure to be adopted, DQ roles to implement and permissions by role.	<ul style="list-style-type: none"> Review out-of-the-box core and custom roles and permissions associated with them Review planned needs for different types of roles. Decide on which roles to leverage and what responsibilities need to be assigned
DIC integration	<ul style="list-style-type: none"> DQ scans and related Rules are configured on datasets to trap bad records. Similar assets/datasets have been ingested in Collibra DIC Catalog. Integration required Prerequisites are completed within the DIC platform. 	<ul style="list-style-type: none"> Assist in enabling DQ-DIC API based integration. Advise on DIC Integration prerequisites and required configurations. Assist in reviewing post DIC Integration results.

Phase/Task	Customer responsibility	Collibra responsibility
Project status	Participate in weekly status reviews and remediation planning for any project risks that arise.	Ensure engagement remains on track and any potential risks or issues are identified early and remedial steps taken.
Education	Schedule and participate in instructor-led training using included Education Credits (see Datashheet).	Conduct required instructor-led training as described in the Collibra Rapid Start DQ Elevate Workbook.
Coaching	Schedule and use twenty (20) included coaching hours as needed.	Provide coaching sessions in accordance with the Coaching Services Datashheet .
Additional Solution Architect hours for one month	Schedule up to twenty (20) hours of working with the assigned Collibra Solution Architect for one month post implementation.	Provide up to twenty (20) Solution Architect hours for one month post implementation.

Out of scope

Any and all tasks not detailed in the IN-SCOPE sections above are considered out of scope, including:

1. Functional use case discovery and implementation.
2. Streaming data sources (e.g. kafka) are out of scope.
3. Test and provide runtime performance and concurrency benchmarks.
4. Database administration (DBA) responsibilities including configuration or administration of database servers and database software.
5. Knowledge of third-party software APIs and interface mechanisms.
6. Use of third-party test automation software or test automation expertise.
7. Custom report development using third party tools.
8. Integration with other systems not specifically included above.
9. Any custom build of scripts to be used for ETL complex flows
10. Data preparation and sourcing or extraction of data from the source systems.
11. Design, configuration and implementation of high availability or disaster recovery environments.
12. Program management is the responsibility of the Customer including all communication with the steering committee.
13. Any development with the REST API.
14. Installation, configuration, use or administration of any third-party software not provided by Collibra.
15. Organizational change management activities such as communication planning, organizational design, or role mapping.

Assumptions

1. Customer will provide requested information for the analyses, including the current procurement process for buying new data sets.
2. Customer will provide machines and network access if Collibra consultants are not permitted to use their Collibra issued laptop (Mac or PC).
3. Customer will provide remote access to Collibra staff to the Collibra environments in-scope.
4. Documents will be delivered using Collibra templates, format, and content.

5. Customer will identify stakeholders representing line-of-business data stewards, procurement, and the data office to participate in the project starting at kickoff.
6. Collibra consultants will make maximum use of out-of-box product capabilities to minimize custom development.
7. The start of the engagement will begin on a mutually agreed upon date between both parties.
8. Customer will have collected all functional requirements, roles, responsibilities prior to the start of the project.
9. Customer will make available key team members during the installation and implementation.
10. Customer's personnel will shadow Collibra consultants as a learning exercise.
11. Customer will identify data sources to be included and provide file extracts and layouts.
12. Any two (2) data sources will be loaded from [this list](#) of supported connections.
13. Customer will secure and provide timely access to data, documentation, systems, and facilities necessary to complete all tasks.
14. Customer and Collibra will mutually agree on the location of work.
15. Collibra personnel shall be deployed during Collibra's normal operating hours in the location of work.
16. The implementation is assumed to run for three (3) consecutive weeks. Delays may have impact on the timeline and require a Change Request (CR) to address the cost overage.
17. The project is expected to be completed within 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 even if the estimated Professional Services time stated above has not been fully utilized in the twelve (12) month period following the Order Effective Date. The parties will negotiate in good faith a CR should any additional days/hours be required beyond the foregoing time period.
18. Customer acknowledges that Collibra may utilize subcontractors in its performance of the Professional Services hereunder.
19. Expenses and Tax are not included in the Professional Services fee. Collibra will invoice Customer for expenses including but not limited to transportation and lodging and meals according to Collibra's Travel and Expenses Policy. Expenses will be invoiced monthly in arrears for actual expenses incurred during the billing period.
20. Customer acknowledges that the expected schedule is based on Collibra's industry experience. While performing the Professional Services hereunder, Collibra may encounter unforeseen circumstances that increase the effort required to fulfill its obligations. Therefore, Customer hereby agrees that should Collibra require any additional hours and/or days to complete the objectives in the Description of Services, the parties shall mutually agree upon a CR setting out the amended scope and/or fees for such additional hours. Collibra shall seek to provide to Customer as advance notice of any such additional hours as reasonably possible.

Role	Responsibilities
Solution Implementation Manager	<ul style="list-style-type: none"> • Accountable for overall project management. • Leads team and provides project directions, maintains delivery schedules and triage escalated issues. • Time management and project progress reporting to the Customer Technical Manager.
Solution Architect	<ul style="list-style-type: none"> • Guide Customer on how to configure Collibra's Data Quality technology given Customer's detailed business requirements. • Responsible for configuring Collibra's products per Customer's instructions. Resolve technical issues. Responsible for all technical deliverables to implement the Customer MVP. • Provides twenty (20) additional hours for one month post-implementation to help with architecture design, strategy, and recommendations.