Health Check
Datasheet

Project objectives

Customer is seeking a quick technical review of their Collibra configuration for either Data Intelligence Cloud or for Data Quality. For Data Intelligence Cloud, this program will assess conformity to best practices in the areas of Operating Model, Catalog performance, and integrations and provide findings and recommendations for fine-tuning the Collibra platform implementation. For Data Quality, this program will assess conformity to best practices in the areas of Operating Model, Data Quality performance and provide findings and recommendations for fine-tuning the Collibra Data Quality implementation.

In scope for Data Intelligence Cloud Health Check

Phase/Task	Customer responsibility	Collibra responsibility
Project Startup	• Run V1→V2 workflow script and send Collibra results. • Provide necessary access to DGC, other materials.	• Gather initial customer information and review process with key stakeholders. • Conduct 1 – 2 planning calls to confirm agenda, logistics and project pre-requisites. • Prepare for Health Check (review existing DGC environment, Workflow Script, other materials) and publish health check agenda.
Operating Model review	Provide list of use cases and requirements that need to be taken into consideration.	• Analyze and review existing Collibra configured operating model (includes metamodel, community and domain structure for metadata components). • Provide best practice recommendations and suggested changes. The recommendations will take into account existing and future use cases.
Workflow review	Customer subject matter experts identify workflows that aren't running optimally or need enhancements for new use cases.	• Analyze and review up to three (3) workflows. • Provide best practice design recommendations and suggested changes.
Integrations	Customer subject matter experts identify sources that aren't running optimally (e.g. ingestion or performance issues).	• Ingestion: Analyze and review existing integrations (Catalog, ESB, or API). Thoroughly investigate one (1) integration. • Provide best practice design recommendations and suggested changes.
Findings and recommendations	Key stakeholders participate in final presentation of findings and recommendations.	• Collate all findings from previous steps into Collibra platform assessment report • Present findings in interactive session with key stakeholders.
Project status	Participate in project status calls and related activities.	Ensure engagement remains on track and any potential risks or issues are identified early and remedial steps taken.

In scope for Data Quality Health Check

Phase/Task	Customer responsibility	Collibra responsibility
Project Startup	• Provide necessary information and issues related to CDQ.	• Gather initial Customer information and review process with key stakeholders. • Conduct 1 – 2 planning calls to confirm agenda, logistics and project pre-requisites. • Prepare for Health Check (review existing CDQ environment & other materials) and publish health check agenda.
Data Quality review	Provide a list of challenges and requirements that need to be taken into consideration. For example: • Data exceptions, anomalies, or errors; • Business rules issues; • Data Source and system data quality issues; or • Monitoring and maintenance challenges.	• Analyze and review existing Collibra configuration and installation. • Provide architecture changes/upgrade. • Guidance around bottlenecks and performance tuning, and consumption. • Recommendations for version upgrades. • Specific Rule Design Patterns challenges. • Risk Assessment of data and user security. • Maintenance assessment and guidance. • Provide best practice recommendations.
Findings and recommendations	Key stakeholders participate in final presentation of findings and recommendations.	• Collate all findings from previous steps into an assessment report. • Present findings in interactive session with key stakeholders.
Project status	Participate in project status calls and related activities	Ensure engagement remains on track and any potential risks or issues are identified early and remedial steps taken.

Out of scope

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

Assumptions

1. Customer will provide requested information for the analysis.
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. The implementation is assumed to run for one (1) week. Delays will have impact on the timeline and may require a Change Request (CR) to address the cost overage.
6. Customer and Collibra will mutually agree on the location of work.
7. Collibra personnel shall be deployed during Collibra's normal operating hours in the location of work.

8. 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.

9. Customer acknowledges that Collibra may utilize subcontractors in its performance of the Professional Services hereunder.

10. 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.

Collibra personnel roles & responsibilities

Role	Responsibilities
Solution Architect	• Preparing and conducting all reviews • Performing the collation, analysis and validation of findings • Preparing and delivering final report of all findings and recommendations
Solution Implementation Manager	• Time & budget management and project progress