Workflow Accelerator
Datasheet

Project Objectives

Customer is seeking support from Professional Services to design and develop a custom workflow in Collibra.

In Scope

Phase/Task	Customer responsibility	Collibra responsibility
Preparation	• Provide and discuss workflow requirements • Complete Business Requirements Document	• Describe and discuss the general approach used to design and implement Collibra Workflows. • Review Customer's Business Requirements Document to confirm requirements are well defined and at a suitable point of readiness.
Blueprint	• Review workflow migration, release and adoption plans. • Review and approve final Business Requirements Document	• Review of workflow migration, release and adoption expectations with customer. • Collect and understand customer requirements to develop/finalize clear Business Requirements Document (BRD). • Perform analysis of desired functionality in workflow vs. existing out of the box capabilities to develop/ present different design options. Determine landscape of customer Collibra environment and how best workflow will be utilized within. • Investigate solution variants and selection of the best fitted option including modularization, setting the level of automation and variable usage.
Configuration	• Business stakeholders review design • Provide approval for initial design	• Show stakeholders how the design meets the business requirements and enables the users to execute documented use cases. • Demonstrate select individual design cases to assure the customer of key requirements being met. • Obtain confirmation of design and sign-off to proceed with detailed design.

Phase/Task	Customer responsibility	Collibra responsibility
Final preparation: Detailed design, development and testing)	Participate in Prototype check-in and provide functional and/or technical feedback and questions	• Technical design and develop the workflow. • Business Process Model and Notation (BPMN) and/or code development within the development environment and unit testing that all components of the workflow (including sub-flows) work as intended before proceeding into implementation • Development Check-In and Prototype: Update customer on progress and current status of the workflow build. • Demonstrate selected individual design cases to ensure key requirements are met. • Complete the technical design and develop the workflow. • Complete BPMN and/or code development within the development environment and unit testing that all components of the workflow (including sub-flows) work as intended before proceeding into implementation.
Transition: Implementa-tion and deployment	• Review workflow • Conduct testing • Promote to next environment	• Show how the developed workflow meets the business requirements and enables the users to execute documented use case(s). • Ensure proper workflow migration of up to one (1) additional environment. • Assist Customer with end-to-end workflow testing.
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.

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

1. Custom workflows other than those agreed upon.
2. Operating model design and implementation outside of the realm of the intended use case(s).
3. Knowledge of third-party software APIs and interface mechanisms.
4. Use of third-party test automation software or test automation expertise.
5. Data preparation and sourcing or extraction of data from the source systems.
6. Any development with the Collibra Data Intelligence Platform REST API.
7. Installation, configuration, use or administration of any third party software not provided by Collibra.
8. Organizational Change management activities such as communication planning, organizational design or role mapping.
9. 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.

Assumptions

1. Data owners have been identified by customer in advance of project start.
2. Customer will identify stakeholders representing line-of-business data stewards, procurement and the data office to participate in the project starting at kickoff.
3. Customer will provide requested information needed for analysis and design of selected workflow(s),
4. The Customer will provide machines and network access if Collibra consultants are not permitted to use their Collibra issued laptop (Mac or PC)
5. Customer will provide remote access to Collibra staff to the Collibra environments in-scope.
6. Documents will be delivered using Collibra templates, format and content.
7. Customer and Collibra will mutually agree on the location of work. As a principle, full-day workshops and trainings are recommended to be conducted on-site whereas activities such as configuration, development, documentation and test support are performed remotely.
8. Collibra personnel shall be deployed during Collibra's normal operating hours in the location of work.
9. The implementation is assumed to run for either three (3) or four (4) consecutive days, based on the offering selected by the Customer. Delays may have impact on the timeline and require a Change Request (CR) to address the cost overage.
10. 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 change request should any additional days/hours be required beyond the foregoing time period.
11. Customer acknowledges that Collibra may utilize subcontractors in its performance of the Services hereunder.
12. Customer acknowledges that the expected schedule is based on Collibra's industry experience. While performing the 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 change order setting out the amended scope and/or fees for such additional hours. Collibra shall use its best efforts to provide to Customer as advance notice of any such additional hours as possible.
13. Customer will reimburse Collibra for reasonable travel and lodging expenses it incurs in providing Professional Services in accordance with Collibra's Travel Policy.
14. Customer acknowledges that the expected schedule is based on Collibra's industry experience. While performing 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 In Scope description of Professional Services, the parties shall mutually agree upon a change request setting out the amended scope and/or fees for such additional hours. Collibra shall use commercially reasonable efforts to provide to the Customer as much advance notice of any such additional hours as possible.

Role	Responsibilities
Solution Implementation Manager	• Accountable for overall project and providing best practice guidance for deployment • Help with design and architecture and ensure alignment with key project use cases • Time management and project progress reporting to Customer Technical Manager.
Solution Architect	• Guide Customer on how to configure Collibra's technology given Customer's detailed business requirements. • Responsible for configuring Collibra's software per Customer's instructions. Resolve technical issues, develop specified workflows and perform integrations. • Develop and test workflows that meet the requirements agreed with Customer.