



CUSTOMER SUCCESS

Implementation Guide

SaaS Edition

AUG, 2022

Introduction

This brief guide outlines the people, priorities, and processes involved in implementing an Immuta data governance solution.

Stakeholders and Owners

The table below outlines the relevant stakeholders and task owners to be identified and consulted during implementation. It is common for one or few individuals to manage multiple stakeholders duties. However, if long term management of specific duties will be transitioned to a permanent owner, those Stakeholders should be involved in discussions and planning on tasks that impact internal workflows and processes.

STAKEHOLDER PERSONA	ROLE DESCRIPTION
Infrastructure/Security	Able to authorize access to necessary network spaces and open relevant ports.
IT/Application Administrators	Authorization to install Immuta in a network location that can access relevant databases. Possesses Administrator access to IAM, Data Catalog, Analytics Tools, or other internal applications. Required to assist with integrations.
User Administrator	Administers users in Immuta. Grant permissions and manage Immuta system accesses.
Data Owner (Data Steward)	Accountable or delegated responsibility to manage and protect access to data sources. Possesses credentials to connect to required databases.
Data Governor/Compliance	Responsible for enforcing organizational privacy guidelines and reporting on compliance.
Data Consumer	End users of data that utilize BI/Analytic or data consuming tools as their primary duties.
Project Manager	Coordinates stakeholders and resources to complete the integration.

Immuta personnel roles and descriptions in the following table outline the members involved in onboarding and beyond.

IMMUTA ROLE	ROLE DESCRIPTION
Customer Success Manager (CSM)	Provides long-term relationship contact, coordinates communication, tracks releases and delivery of success criteria
Technical Program Manager (TPM)	Plans and coordinates onboarding of initial use cases.
Customer Success Architect (CSA)	Provides feature training along with integration and implementation designs
Solutions Engineer	Technical implementation, networking and integration of Immuta into your infrastructure

Success Criteria

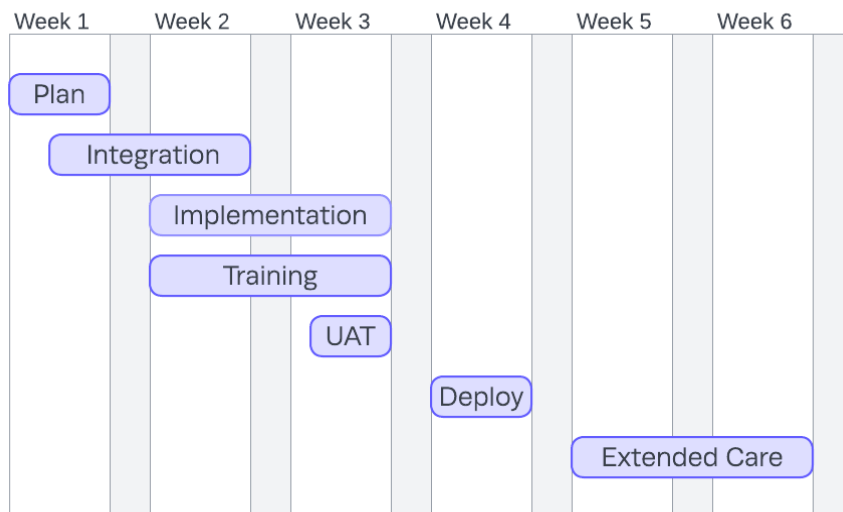
To facilitate an efficient and target onboarding process, the Customer Success (CS) team will review the success criteria of the project. These criteria are expected to describe the measurable outcomes of a data governance solution and will help guide design, implementation, and deployment of policies.

Implementation Phases

The following phases outline the process of implementation at a general level. The assigned Technical Program Manager (TPM) will work with you to detail the specific requirements and tasks for each phase.

PHASE	DESCRIPTION	EFFORT
Planning / Solution Design	Review the business use case and develop a plan for implementing the required policies.	1 weeks
Integration	Connect any data catalog, IAM, and data sources into Immuta.	1 weeks
Implementation	Create policies in DEV and PROD environments.	2 weeks
Training	Hands-on workshops to train governors on policy implementation	2 weeks
UAT	Users confirm implemented policies	1 week
Deployment	Plan for fulling deploying Immuta policies to all data sources and users. Publish policies in PROD environment	1 week

The following chart is an illustration of the execution of each phase. Your plan will vary depending on your specific requirements and timeline.



Immuta SaaS Requirements

Description of Installation Services

The Immuta [SaaS](#) platform requires minimal setup for installation. During Onboarding, an Immuta representative will guide a customer through the process of finalizing the instance configuration and initializing the first user.

Installation Responsibilities

Immuta: During installation of the Software, your Immuta Support Professional shall

- Schedule the installation date and time with the Customer
- Provide new Immuta SaaS instance
- Maintain availability to the Customer until installation is complete
- Troubleshoot installation issues as they occur

Customer: During installation of the Software, the Customer shall

- Provide availability for Immuta installation with required personnel
- Select preferred communication method during installation
- Provide timely responses to requests for information when troubleshooting installation issues

Integrations With Customer Systems

Description of System Integrations

Following successful installation, the software is ready to be integrated with Customer systems. System integration is conducted by the Customer system administration personnel with remote assistance. During that time an Immuta Support Professional will be standing by to troubleshoot any issues that may arise. The duration of system integration can vary based on the complexity of Customer systems, but can typically be completed within 2-3 working sessions.

System integration includes connection and configuration with Customer identity access management (IAM) systems, data sources, data catalogs, and analytics tools. Additional details and links to relevant documentation are below:

- [Identity Access Management \(IAM\)](#): The built-in IAM HTTP API allows customers to programmatically access information about users, their group memberships, and authorizations.
- [Data Sources](#): The Immuta data control plane plugs into existing data sources and ongoing work while remaining completely invisible. Immuta also provides a number of [native access patterns](#).
- [Data Catalogs](#): In addition to the built in Immuta catalog, Immuta allows customers to integrate current external catalogs from many different tools.
- [Analytics Tools](#): Equipped with the Query Engine and the Virtual Filesystem, the Immuta Software is easy to integrate with many analytic or BI tools.

System Integration Responsibilities

Immuta: During System Integration, your Immuta Support Professional shall

- Maintain availability during Customer business hours until completion
- Provide creative solutions and troubleshoot issues
- Provide timely responses to Customer questions

Customer: During System Integration, the Customer shall

- Ensure network connectivity between Immuta and other systems
- Provide Immuta credentials to data sources
- Select preferred communication method
- Provide timely responses to requests for information when troubleshooting issues

User Training Services

Description of Training Services

As part of the implementation step of onboarding, Immuta will provide workshops to explore and construct policies that solve the initial use case. This train-the-trainer approach focuses the training on the specific features used in policy implementations.

In addition to onboarding services, Immuta offers self-paced user training videos to accelerate adoption within the customer's organization. These videos provide content that covers the basics of navigating the console, creating and using data sources and projects, authoring policies, and connecting to analytics tools.

A short list of the training we employ follows:

- [Tutorial Videos](#) - Includes a 5 minute quickstart video as well as short functional videos highlight Immuta functions in a digestible format.
- **Policy Workshops** - Short remote workshops to demonstrate the capabilities of Immuta Policies and enable the first use case.
- **Custom Immuta Training Workshop** - Customized Immuta training workshop available onsite or remotely for a fee.
- [Immuta University](#) - Contains an online persona-based learning path to introduce new users to the foundations of Immuta relative to their job role.