

IB-ARM Proof of Concept Protocols

Approach

The following are the key elements of an ib-ARM Proof of Concept (POC) engagement:

a. Pre-requisite

The preference is that a preliminary “intent-to-buy” is established. The POC is typically preceded by an introduction to ib-ARM, an actual demonstration of the tool’s capabilities, an ROI model for the ultimately intended scope (if applicable), a discussion and understanding of the ultimate investment requirement and pre-clearance of budget allowance. Also, acceptance criteria should be articulated and documented if possible.

b. Objective

The objective of the POC is to confirm the tool’s advertised capabilities with the prospective client’s own code base in an actual install. If needed, customization capabilities may also be demonstrated.

c. Scope

The suggested scope of a POC is 2-4 million lines of code, representing the technology mix of the prospective client. The number of applications is not relevant, but the POC should include at least 2-3 applications. Application “subsets” should be avoided if possible (they tend to lead to a lot of “missing components” or unresolved relationships that deteriorate the user experience during acceptance).

d. Execution Protocols

POC execution protocols are similar to actual engagement models. The preferred approach is to have the prospective client’s code base transmitted to the Information Balance (IB) lab via secure FTP and perform the generation of repository content on IB’s site. Once completed, the install is published to a client-only access, secure internet site for acceptance testing. Alternatively, the POC can be performed remotely on the client site. The two approaches are further detailed in section “Execution Protocol Alternatives” below.

e. Resource / Time Requirements from Client

For a typical POC, resource / time requirements would be as follows:

- i. Code extraction/collection: IB provides code “collection” instructions on how to extract production source code from its source (mainframe pds, server directory, special purpose tool, database catalog, etc.). A client resource is required to set up and run the extraction scripts and FTP the results to the ib-ARM server. For a 2-4M LOC POC, this should be 1-3 days of effort depending on how the prospective client’s production source is organized.

- ii. Information Architecture (IA): every install is based on an information architecture created for the scope in hand. It is essentially the meta-model for the repository and is based on the technologies/languages involved. It also incorporates all custom needs and requirements (there is less focus on this for POC-s). The starting point for the IA is a series of boilerplate meta-models consistent with the technology mix. This then gets modified based on client specifics – normally in a 2-3 hour session, attended by application experts from the client. If the POC is 3-4 apps and 2-4M LOC, the IA session may require a couple of people for 1-2 hours. The completed IA is used to finalize the Repository's meta-model.
- iii. Acceptance Testing: Once the tool is installed, content processed and published, acceptance testing takes place to ensure that everything works fine and according to expectations. This normally (on the above scope) takes 1-2 weeks elapsed time with 2-3 people.

f. Acceptance

As per above, acceptance is a series of tests to verify content and confirm that expected functionality is present in the POC install.

g. Timeframe

A typical POC runs 2-6 weeks.

Execution Protocol Alternatives

As indicated above IB can perform an ib-ARM POC on a portion of an organization's application portfolio in one of two ways (1) at the IB Lab, or (2) remotely, on a server provided by the prospective client.

1) At the IB Lab

In this approach, IB's servers and infrastructure are used to deliver the POC.

The client organization extracts the source code (using the IB supplied source code collection instructions) and transmits it to Information Balance. The code is typically transmitted via secure FTP. IB will sign a Non-Disclosure Agreement as required by the client organization.

IB then processes the source code at its Lab, performs any required parser calibrations, creates the ib-ARM POC site and then makes the site available to the prospective client over the internet.

2) Remotely

In this approach, the source code remains on site and the POC is performed entirely within the prospective client's environment.

IB uses remote desktop connection to set up the ib-ARM software and run the POC. Setup requirements are as follows:

- Remote desktop access to a Windows system (Server 2008 64-bit recommended).
- Minimum of 2 accounts with access permissions sufficient to install programs and perform local system administration tasks.
- Minimum of 4 CPU cores.
- Minimum of 8 GB physical memory.
- Microsoft Internet Information Services (IIS) installed with Windows.
- Adequate disk space – OS + Application software + 10 GB per million lines of code. RAID disk provision, if available, can improve performance significantly. Minimum of 3 partitions, if available (1. OS and application software partition, 2. Database partition, 3. Data processing partition).
- Internet access to download files from Information Balance – this is needed to deploy the IB-ARM software, configuration data, database software, and license keys.
- Client source code – this can be kept on an external file share. IB will provide source code collection instructions that describe how the code should be collected.