

IB-ARM On-site Projects

Information Balance (IB) can perform IB-ARM implementations using a number of approaches.

IB prefers to have the client's code base transmitted to our lab via secure FTP and the generation of the initial repository content performed at our site. Once completed, the install is published to a client-only access, secure internet site for acceptance testing. Alternatively, we can perform the implementation remotely on the client site.

For an additional charge, IB can also perform IB-ARM installations at the client location. This document outlines the approach that is used for performing IB-ARM installations on-site at client locations.

1. Initial Requirements Gathering

The following information is required to plan for the project:

- a. Technology stack used by client application(s) – basically a list of technologies used in the application(s) being added to IB-ARM.
- b. Size of applications based on lines of code.
- c. If required, IB can provide a Technical Survey document to help the client articulate the technology component types, plus the number of components and / or lines of code.

2. Project Preparation Documents

Based on the initial requirements gathered above, IB will provide the following documents:

- a. Source Code Collection instructions – details the code objects to be collected and format(s) to be used
- b. IB-ARM Hardware / Software Requirements – details the server hardware, software and network requirements for an IB-ARM installation
- c. IB-ARM Prerequisite Installation - software to be installed prior to IB-ARM install

3. Client Project Preparation Tasks

Based on the Project Preparation documents above, the client organization needs to complete the following tasks before IB's arrival at the client site:

- a. Procure and install IB-ARM server – the client organization must procure an appropriate server, install the required software and connect the server to the network ensuring remote desktop access is available.
- b. Code extraction/collection – based on the code collection instructions, a client resource is required to set up and run the extraction scripts and FTP the results to the IB-ARM server. In our experience, for a 2-4 million lines of code (LOC) project, this should be 1-3 days of effort depending on how your production source is organized.
- c. Arrange desk locations for IB team to work - three (3) workstations are sufficient. The workstations should have network access that will allow the IB team to connect their laptops to the network and access the IB-ARM server via remote desktop.

4. IB Project Preparation Tasks

Based on the initial requirements gathered, IB will undertake the following tasks before arrival at the client site:

- a. Create an initial profile and site containing sample code
- b. Package the IB-ARM software plus initial profile and site

5. On-site Tasks

The following tasks will be undertaken upon arrival at the client site:

- a. Install and test IB-ARM software (Day 1)
 - i. Install IB-ARM software plus initial profile and site
 - ii. Install Admin workbench and run a refresh of initial site
- b. Information Architecture for Client Site (Day 1)
 - i. Review code extract files provided by client (Day 1 – a.m.)
 - ii. Conduct Information Architecture session (Day 1 – p.m.) - 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 applications/technologies/languages involved. It also incorporates all custom needs and requirements. Typically 2-3 hour session, attended by 2-3 application experts from the client.
- c. Client site configuration and testing (Day 2 – 5)
 - i. Based on the information architecture and code received, the site is configured and tested.
 - ii. Depending on the client code content and customization requirements, changes may be required to ARM software (parsers, mapping). These changes may extend beyond Day 5.
- d. Acceptance Testing (after site configured and tested)
 - i. Once the site is complete and published, acceptance testing is conducted by client resources to ensure that everything works fine and according to expectations. This typically takes 1-2 weeks elapsed time with 2-3 people.
- e. Analyst Workbench Training (after Acceptance testing complete)
 - i. Training session(s) for 15-20 people per session (a session is 3 hours). We require a training room with workstations (or access for laptops) to access the IB-ARM site.