

Service / Engagement Protocol



The objective of the [IB-ARM Delivery Process](#) is to mine and present the content buried within an organization's system and business objects. Content is explored, consolidated and delivered via a user-friendly web portal. Moreover, once organized, the content is kept continuously up to date via automated refreshes of the repository.

Fundamentally, there are two approaches to implement IB-ARM. One can opt to apply the technology to the various information silos (such as documentation, a certain platform or application set, etc.) one after the other, in priority order. As each silo becomes organized and its internal relationships are fully mapped, the corporate-wide repository is gradually built up to include all silos.

The other approach implements Application Relationship Management using a 'horizontal strategy' - utilizing IB-ARM to include progressively deeper relationship information across all platforms and information silos. Using this approach, the corporate-wide repository is built immediately (for example showing that an application relates to the server it is running on). The level of detail found in the repository is then gradually built up, including more detailed relationship information (e.g. how application and network components relate to each other and other items in the repository).

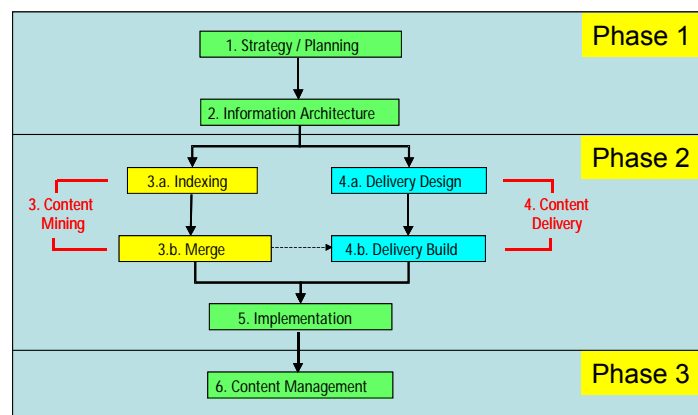
In either case, the highest likelihood of timely success is delivered by an implementation plan that addresses current pains, critical projects and overall business drivers alike, and takes a realistic ROI focused approach.

IB-ARM Delivery Process

The IB-ARM process utilizes a combination of proprietary automated technologies plus manual manipulations by subject matter experts to derive the consolidated IB-ARM content repository.

Information Balance recommends a focused, phased implementation. In [Phase 1](#), all requirements are gathered and a customization plan with timelines and costs is delivered. In [Phase 2](#), IB-ARM is installed and implemented. During [Phase 3](#), the Repository is maintained on a hosted basis.

Each IB-ARM project follows a proven process for analyzing and extracting the content and delivering that content for use by the IT organization.



Phase 1: Create ARM Program Plan

Objective

In this phase, the Strategy / Planning and Information Architecture components of the methodology are delivered:

Strategy / Planning

- Determine the Scope
- Assess the project based on the number and complexity of the objects to be included
- Understand and coordinate with the organization's unique culture, terminology, technology and processes

Information Architecture

- Understand the underlying structure of the business objects being organized.

The objective of this phase of the engagement is to gather additional information to define the exact requirements for IB-ARM. These requirements will detail the specific granularity (and options for levels of granularity) of information and element relationships of the applications and artifacts to be contained in the IB-ARM repository.

Deliverables

The outputs / deliverables of this phase are itemized below.

A) Information Requirements

- a. Source Sizing: Applications, infrastructure, documentation
- b. Source Format: Raw (e.g. code, hardware topology, documentation formats) vs. Intelligent (output of existing tools, analysis)
- c. Source Content: Understand the underlying structure of the business objects being organized
- d. Target Format: Reporting, intranet, other
- e. Target Content: Depth, granularity
- f. Continuity: Repository maintenance requirements

B) Priority Table

This section defines opportunities for the phasing of implementation by categorizing each scope item as per the organization's goals and priorities.

C) Implementation Plan

- a. Timing
- b. Costs
- c. Measurement Factors – ROI metrics and criteria
- d. Provisions for Maintenance

D) Static prototype to illustrate component hierarchy

The Process

Even the promise of achieving a highly effective IT environment may not allow our clients to commit significant resources to the project. Information Balance has defined a highly effective process to deliver this phase with minimum reliability on client resources. Our process incorporates a few facilitated meetings and directional settings but otherwise draws upon our experiences to create the IB-ARM Program Plan, in a relatively short period of time (4-6 weeks).

During this phase, Information Balance defines the exact scope and the required granularity that would need to be included into the IB-ARM repository. This phase is carried out to allow maximum benefit for the client via the customization of the IB-ARM interface.

This is accomplished via a limited number of requirements analysis sessions followed by review sessions. The purpose of the requirement analysis sessions is to identify all the objects, object relationships and their representations in the client version of IB-ARM. The goal of the review sessions is to present back to the client static (i.e. non-working) sample views (tables, graphs, etc) that meet the stated requirements.

Phase 2: Implement ARM Program Plan

Objective

During this Phase, the Content Mining, Content Delivery and Implementation components of the methodology are delivered:

- Content Mining
 - Utilize the IB-ARM proprietary technology to parse, assess, filter and index the objects to be organized
 - Merge the content from the relevant sources into a coherent set of objects

- Content Delivery
 - Deliver the prepared content in a meaningful way based on the information architecture that allows users to easily access and search the object set
 - Customize selected delivery mechanism (online portal or web site), as necessary
- Implementation
 - Move the content and delivery into a production status

To accomplish the above, Information Balance will implement the IB-ARM Repository, as well as customize the browser front-end (or any existing client portal) to the Repository as defined during Phase-1.

Deliverables

- IB-ARM Repository, populated with application source code / documentation / infrastructure information
- IB-ARM Repository implemented at client site or as a hosted solution
- Customized Intranet interface (or portal) to IB-ARM Repository
- Cost-saving / productivity benchmark base

The Process

The following describes the **Source Collection Process** used by IB. This highly effective process, taking advantage of many years of experience, is followed for all IB-ARM projects, to varying degrees, depending on the volume of source code.

There are three main activities that encompass the source collection process:

- Formal Kick Off meeting
- Application Technology Survey Turnover Meeting
- Collection Assistance

A **Kick Off Meeting** is set up to:

- Meet the relevant team members. These are the resources that understand the technical details of the applications in scope of IB-ARM.
- Describe the Project including the scope and process and where the source collection activities fit within the overall project.
- Introduce the process for system source code collection and understand any up front challenges, including the potential need for collection assistance.
- Introduce and walk through the 'application technology survey' and request that it be filled out within a 1-2 day turnaround time for Application Technology Survey turnover meeting.
- Review any potential for shared and/or common components across multiple applications.
- Determine final reporting and document organization requirements.
- Review the next steps.

The **Application Technology Survey Turnover Meeting** is set up within 1-2 days of the kick off meeting. The objectives of this meeting are:

- To review in detail the completed surveys in order to request the components that are required for the collection, in the most effective and efficient way, minimizing both the client resource time and elapsed time to implement the Repository

- To review any client questions on the survey and determine the best course of action to complete any unanswered areas
- To finalize the components requested for the IB-ARM project

Collection Assistance is on site assistance for the client that may be requested when:

- There is extensive use of common shared components, and/or
- Extensive use of 4GL's and/or
- Potential transmission challenges both in terms of media and format and/or
- Lack of client resources

Note: These questions are reviewed in the kick off meeting to assist in preparing for the possibility of requiring this on-site service.

Environment Setup

Upon delivery of source to Information Balance, we load the IB-ARM Repository. The knowledge gained through the Collection steps allows Information Balance to customize its parsers and facilitate an effective, error-free parsing process. In other words, the more we know about the source, the better prepared we can be to parse source in an effective and speedy manner.

Phase 3: Continuous Maintenance of the IB-ARM Repository

During this Phase, the Content Management component of the methodology is delivered:

- Content Management
 - Ensure that an on-going content management solution, including version control, approvals workflow and publishing facility, is in place to keep the content up-to-date and consistent.
 - Perform appropriately scheduled refreshes of the IB-ARM Repository.

During this phase, a Service Level Agreement (SLA) is established with the client. Information Balance then maintains the IB-ARM Repository in compliance with the SLA.

About Information Balance, Inc.



Information Balance, Inc. was founded in 1988 to provide consulting and training services to the IT industry. Over the years and through continuous growth, the company's field of expertise has significantly broadened and now includes all aspects of Systems Development and Integration, covering all platforms including mainframe, client/server and the Internet. Many of these areas are

supported by formal training curricula.

Today, Information Balance, Inc. is a well-established firm with offices in Canada and Europe. Sustainable, controlled growth has been the mainstay of Information Balance's success, with over 30% growth year over year. Information Balance has been awarded the following accolades supporting its corporate excellence.

- Financial Post Fast 50 ('98,'99,'00)
- Profit Top 100 ('99,'00)
- Andersen 50 Best Privately Managed ('99, Regional Finalist)

Information Balance maintains on-going professional relationships with many large Fortune 500 corporations and government organizations.

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