APM Instrumentation Pilot

Company name – Application Name

Success Criteria, Resources and Statement of Work

Date

***[Instructions: Read required resources, fill out green fields as part of scooping discussion. Detailed technical questions are provided at the bottom as a reference. Vendor systems engineer will estimate time required.]***

*Success Criteria, Resources and Statement of Work*

**Success Criteria**

* Install APM software in customer test application environment.
* Monitor application during load test.
* Show product features and modules working in customer environment.
* Transfer knowledge to customer during work.

**Resources**

**Vendor Provided**

* Vendor technical resource to assist in installation, configuration and knowledge transfer
* Vendor software and license key for scoped configuration and relevant documentation and other information.

**Customer Provided**

* Test application environment for APM Agent
* Machine for APM Enterprise Manager
  + Technical requirements as outlined in this document.
* Technical evaluators, prospective APM users, and relevant stakeholders in application performance and management must participate in and/or see results of work.
* Personnel to assist in
  + Application Server configuration and control (start, stop)
  + APM Installation (must have rights to upload and modify files)
  + Load generation control (must be able to start, stop and modify load scripts)
  + Network configuration to permit connections among all the installed APM components
* Access to personnel with detailed knowledge of application architecture, components, APIs, and supporting systems
* Load generation tool(s) and scripts

**Time Period**

The evaluation will last a period of n week(s), starting DAY MONTH YEAR.

**Legal**

An APM evaluation agreement and mutual NDA must be in place before the start of the pilot.

**Detailed Customer Environment & Installation:**

*This evaluation is to be performed on this environment only and none other without first consulting a Vendor representative.*

**Application**

* Application Server(s)
  + [CONTENT]
* Application Database(s)
  + [CONTENT]
* Database Driver(s) in use
  + [CONTENT]
* Operating System(s)
  + [CONTENT]
* Clustered? How many instances
  + [CONTENT]
* Class loading for application
  + [CONTENT]
* Ability to run load on application in timely manner
  + [CONTENT]
* Ability to recycle application
  + [CONTENT]
* Access to Application Server start scripts and administration console
  + [CONTENT]
* Relevant URL or IP groups
  + [CONTENT]

**Network**

The network and/or firewalls must permit:

* A TCP/IP socket connection from the managed application (instances) to the Metrics Storage (by default on port nnnn) and
* An RMI connection from the Workstation to the Metrics Storage (default port mmmm)

**APM Metrics Storage**

Requirements:

* Separate Intel/NT/UNIX box with minimum 1024MB RAM and at least 2 1Ghz processors
* 10-40GB free disk space for historical data archive
* Machine name:
* OS:

**APM Workstations**

Requirements:

* Windows NT/2000/XP machine with minimum 1024MB RAM, at least 1Ghz processor and 50MB disk for installation
* User/Machine name:

**Load Generation Tool**

*An effective evaluation cannot be performed without a load generating tool to exercise the application being monitored.*

* [CONTENT]

**Contacts:**

**Customer Evaluators**

* + [ CUSTOMER ]

**Vendor Technology Team**

* + [ Vendor Sales Executive ]
  + [ Vendor Pre-Sales Consultant ]

# Statement of Work

**Estimated Time: 3-5 Days**

[Use the following as a guide. Remove items that are not part of this evaluation.]

Have kick-off/introduction/orientation meeting/presentation

Install APM Workstation, Enterprise Manager and configure database connection

Install APM Agent software in customer test application environment.

Monitor application running with test load scripts.

Show Vendor product features and modules working in customer environment to evaluators.

Transfer knowledge to customer during work.

Customize data reported by Agent (for at least one component or method, if necessary).

Customize at least one Dashboard view for production.

Customize at least one Dashboard view for “drilldown.”

View historical data in Workstation.

Query transaction repository for stored transactions and error snapshots

Set up at least one Alert.

Produce at least one Report.

[Place the following in order of priority interest and remove those which are not applicable.]

Install and use APM extensions (in order of customer preference):

* PowerPack for WebLogic/WebSphere
* SQL Agent
* PowerPack for CICS/Tuxedo/MQ
* APM Portal Manager
* Browser Response Time Adaptor
* LeakHunter
* Extended Performance Agent (EPA)

Have wrap-up meeting/presentation.

**Out of Scope**

Additional APM extensions

Integrate with management framework.

Tune monitoring configuration for production deployment.

Develop custom Environmental Performance Agent plug-ins.

Develop code with APM Data API.

Trace cause of identified memory leaks.

Use JDBC database for APM historical data

**Next Steps**

Assuming that the Success Criteria are met to the satisfaction of Customer, Customer agrees to move forward in discussions to purchase APM.

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| --- | --- | --- | --- | --- |
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| Vendor Manager | Date |  |  | Date |
| Vendor, Inc. |  |  | Customer |  |

APPENDIX A: DETAILED ENVIRONMENTAL QUESTIONS

**Workstation**

1. On which/whose machines will the Workstation be installed?
2. Are there any of these machines which are not running Windows or have less than 256MB memory installed?

**Enterprise Manager**

1. On which machine will the Metrics Storage be installed?
2. What is the OS on the machine where the Metrics Storage be installed?
3. Who administers the machine and who will work with us to install and configure the Metrics Storage?
4. How much disk space is available on the machine for Historical Data Archive?
5. What is the SMTP server that should be used to send email alerts?

**Network**

1. Have network administrators verified that the following are not used between the Workstation, Metrics Storage, Database and Managed Application (APM Agent) machines?

* Firewall(s) filtering by port
* Firewall(s) filtering by protocol
* Network Address Translation (NAT)

**Managed Applications - General**

1. Which applications will be monitored with APM during the Pilot?

**For Each Managed Application**

1. What is the application called?
2. On which machine(s) will the application be configured with APM?
3. On which OS and application server versions are the application running?
4. Is clustering used in the Pilot environment?
5. Are any applications other than the Pilot applications running in the same application servers or JVMs?
6. Are other applications or instances which will not be monitored by APM installed on the same server or node as the application instance(s) we will be working with?
7. Are the start-up scripts basically those provided by the application server vendor, or have new scripts been created which are specific to your environment?
8. Who will be the technical person working with us to set up APM on this system?
9. Is this technical person also responsible for day-to-day production/operations management? Are there any other restrictions on the time they are available?
10. Does that technical contact know the following?
    1. That they have permission to change application setup, including startup scripts and application server configuration?
    2. Is code specific to the application in classes directories, .jar, .war or .ear files, deployment directories, or stored other ways and places?
    3. Is any code location specified in the Java classpath or in -classpath command-line arguments?
    4. Which JDBC driver class(es) does the application use?
    5. Which code is used to access back-end systems?
    6. Where are log files (for standard out and standard error in particular)?
11. Who are developer or architect contacts?
12. Have they already provided, or are they prepared to provide application-specific information, including:
    1. how the application’s URLs map to specific areas of the application (e.g. /pricecheck and /memberlogin or /app1/controller?action=login and /app1/controller?action=updateorder)
    2. important components to monitor for the most important kinds of transactions, including:
    3. high-level application components,
    4. back-end access components,
    5. components which would affect or be affected by poor application performance
    6. (trying to avoiding components which happen 10s, 100s or more times per user-oriented transaction), and
    7. the package, class and method names for the primary entry points into those components?
13. During the Pilot period, will there be restrictions on stopping, starting and exercising the application?
14. How will the application be exercised during the Pilot?
15. Who are the contacts to have load created in the system?
16. Are there time-of-day or other restrictions on when load can be run in the system?
17. What are the IP address ranges of different user populations who would use the application in the test environment (for IP address groupings)?
18. Is there anything else that needs to be considered for monitoring this application during the Pilot? Is there anything else we need to know?

**Other Contacts**

1. Are there other people who should be involved or see the evaluation work, such as members of the systems management teams or capacity planners?

**APPENDIX B: Customer Defined Issues & Usage Scenarios**

**GOAL:** Why is the company evaluating Performance Management Software?

**How is monitoring currently implemented at company?**

* What are the current issues & concerns that have been identified before the pilot?
  + Example: Are email alerts being implemented? Is there insight to a transaction through the application? Etc…
* What issue has the highest importance for the customer?
* What functionality addresses the highest ranked issue?
* Is a competitor’s product currently being used today? In production? In QA? In Development?
  + What features do they like about the current products?
  + What do they feel is missing?
* Is there a requirement that APM can not meet?
  + Do we have a full understanding of the required functionality?
  + Is there an alternative?
  + How important is this functionality to the prospect?

**Have Usage Scenarios been built around the prospects concerns before the pilot? What functionality needs to be demonstrated based on the usage scenarios?**

* Memory Leak detection
* Email Alerts
* Running a script based on an alert
* Browser Response Times
* Customizable displays of Information
* Developer Views, QA Views, Production Views, Management Views
* What metrics are they most concerned about monitoring
  + Threads?
  + Concurrency?
  + Database Connections?
  + Tuxedo?

**Based on the usage scenarios what functionality needs to be implemented to solve prospects issues?**  (Ranked from highest importance to least)