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| Project Status Report |  |

# Project Name: Full Stack Observability Assessment

Reporting Period: July 7 to July 11, 2025

Prepared By: Carlin Preun

Date: July 11, 2025

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| **Executive Summary** | The project is progressing as planned. This week feedback on the Advisor Portal dashboard was received from key stakeholders and the scope of components confirmed. Major data sources were also validated though work remains to identify and enrich sources. A real-time data source was identified for the dashboard, and most connections have now been populated with real-time performance data. Alignment was achieved on deliverables for next week’s dashboard show-back to Sam and Andrew, and another meeting is planned with Trevor on Monday to review and obtain feedback before the show-back on Wednesday. |
| Overall Status | * ****On Track ():**** Project progressing as planned. |
| Issues: |  |
| Key Accomplishments this week | * OA dashboard updated with new connection and performance data (v1, not yet real-time) * Scope of components in Advisor Portal Executive dashboard validated * Current data sources for Advisor Portal Executive dashboard validated * Real-time data source identified for Advisor Portal Executive dashboard, dashboard partially updated |
| Milestones planned this week, but not achieved with variance: | * Update Advisor Portal and Online Access dashboard supporting documentation (July 22nd) |
| Milestones planned for next week: | * Dashboard review with Trevor and show-back with Sam and Andrew * Advisor Portal dashboard updated with current real-time data sources and monitor rollups, additional updates (nomenclature, layout...) based on feedback received * Online Access dashboard updated with current real-time data sources and monitor rollups, additional updates (nomenclature, layout...) based on feedback received |
| Areas/questions for discussion: |  |
| Last week’s issues forwarded to this week: |  |