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| Project Status Report |  |

# Project Name: Full Stack Observability Assessment

Reporting Period: June 30 to July 4, 2025

Prepared By: Carlin Preun

Date: July 4, 2025

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| **Executive Summary** | The project is progressing as planned. This week the Advisor Portal dashboard was updated based on feedback received from executives as well as identification of callouts from available data. Tagging standards were discussed with stakeholders and will proceed on a best-effort basis based on the tags identified. |
| Overall Status | * ****On Track ():**** Project progressing as planned. |
| Issues: |  |
| Key Accomplishments this week | * Callout URLs for Digital Forms 1.0, DocuSign, CapIntel, Nesto, and Marketing Cloud identified * AP Executive dashboard has been updated with new connection and performance data |
| Milestones planned this week, but not achieved with variance: |  |
| Milestones planned for next week: | * Update OA dashboard with new connection and performance data * Validate scope of components in Advisor Portal Executive dashboard * Validate identified data sources for Advisor Portal Executive dashboard * Identify SMEs for Salesforce and MuleSoft data source enrichment * Update Advisor Portal and Online Access dashboard supporting documentation |
| Areas/questions for discussion: |  |
| Last week’s issues forwarded to this week: |  |