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| Project Status Report |  |

# Project Name: Full Stack Observability Assessment

Reporting Period: May 19 to May 23, 2025

Prepared By: Carlin Preun

Date: May 23, 2025

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| **Executive Summary** | The project is behind schedule. Instrumentation of the Advisor and Client Portals is still on hold, though the RUM Team has engaged with us and instrumentation of an Online Access dev environment is expected next week. In the absence of clear direction on critical business processes, we have begun identifying candidate processes based on what we have learned and where we are able to make progress. Instrumentation of CMOD has been delayed until we are able to review our solution design with CMOD SMEs, and solutioning for Citrix/ControlUp is on hold until we obtain a ControlUp API key. Observability onboarding meeting was held with RBroker and next steps planned. |
| Overall Status | * **At Risk:** Some issues may affect timeline, budget, or scope but are manageable. |
| Issues: | * ControlUp API key has not been provided * Not all CMOD SMEs are available for engagement next week |
| Key Accomplishments this week | * RUM team engaged and next steps for POC determined * Draft CMOD solution design and dashboards complete * RBroker team engaged and next steps planned |
| Milestones planned this week, but not achieved with variance: | * Advisor Portal/Online Access milestones are on hold until critical processes are determined * Scope of CMOD observability defined and solution design completed **(two weeks)** |
| Milestones planned for next week: | * RUM POC (Online Access dev environment) instrumentation * Meeting with RBroker team to identify critical processes * Meeting with CMOD team to review solution design |
| Areas/questions for discussion: |  |
| Last week’s issues forwarded to this week: | * Key business transactions for AP/OA have not been determined |