**Background pattern

Description automatically generated**

**Document of Understanding**

For

**CSX**

Customer Main Contact Name: xxxx

Customer Main Contact Email: xxxx

Instana Solution Architect / Engineer: Anthony Wooden/LeJeune

IBM Technical Representative: Jason Shamroski

Icon

Description automatically generated

Contents

[Intro 3](#_Toc73721011)

[Instana Infrastructure 3](#_Toc73721012)

[Milestones 3](#_Toc73721013)

[Involved teams and use cases 4](#_Toc73721014)

[Use Case 1 4](#_Toc73721015)

[Current Architecture 6](#_Toc73721016)

[Current Monitoring 6](#_Toc73721017)

[Technology Stack 7](#_Toc73721018)

[Roles & Responsibilities 8](#_Toc73721019)

[**CSX** Responsibilities 8](#_Toc73721020)

[**IBM** Responsibilities 8](#_Toc73721021)

[Presentation of Proof of Concept Results 9](#_Toc73721022)

[Completion Criteria 9](#_Toc73721023)

[Success Criteria 9](#_Toc73721024)

[DOU Review and Acknowledgment 9](#_Toc73721025)

[CSX and IBM Contact Information 10](#_Toc73721026)

# Intro

The purpose of this scoping document is to assist in the preparation and implementation of the Instana Proof of Concept (POC) for **CSX** . It will summarize the goals, technical success criteria, POC application environment, and personnel contacts to ensure that the POC requirements are understood and expectations set appropriately among the participants.

## Instana Infrastructure

|  |
| --- |
| How will the POC installation be conducted? As an on premise installation where you host the controller within your own environment? Or using the Saas solution, where we provide the central server (backend) and you only deploy the agents?  SaaS  I acknowledge and consent to that members of the Instana Solution Architect team may access the dedicated processing environment made available for the evaluation of Instana's services for the sole purpose of assisting with and the duration of the evaluation.  **Yes** |
| Agent deployment during POC: Dynamic / Default  Planned Instana deployment for production: Self Managed RH Linux  Tenant Name / Tenant Unit Name: env-CSX  Authentication: Basic Authentication  Internal Instana Ref #: |

# Milestones

|  |  |
| --- | --- |
| Milestones | Status/Plan Date |
| PoC kickoff / begin product install |  |
| Configuration |  |
| Use case execution start |  |
| Use case execution end |  |
| Final presentation of results |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Involved teams and use cases

|  |  |
| --- | --- |
| Teams involved | IBM AIOps Software Group  Instana |

Use Case(s)

### 

|  |  |
| --- | --- |
| Use Case 1 | |
| We want to tackle the following problem | Monitor the Middleware Software that makes up our primary application, The following Middleware Software is used in the application: DataPower, IIB, MQ, DB2, WebSphere. |
| At the moment we are doing this | - |
| We envision the following solution | View the data metrics for each of the Middleware components with views of Tables and dynamic graphs as desired. |
| This will tell us if we are successful | Verify that alerts get generated when certain conditions are met to ensure that the necessary personnel can address the issue before it impacts our customer and/or causes an outage. Bringing forward KPIs such as Response Time for API calls, Time-Frame monitoring, and configure alert channels to notify relevant stakeholders. |
| SLAs which are affected? | - |

### 

### 

### 

|  |  |
| --- | --- |
| Use Case 2 | |
| We want to tackle the following problem |  |
| At the moment we are doing this |  |
| We envision the following solution |  |
| This will tell us if we are successful |  |
| SLAs which are affected? |  |

### 

### 

|  |  |
| --- | --- |
| Use Case 3 | |
| We want to tackle the following problem |  |
| At the moment we are doing this |  |
| We envision the following solution |  |
| This will tell us if we are successful |  |
| SLAs which are affected? |  |

|  |  |
| --- | --- |
| Current Architecture | |
| Application Architecture JAVA-BODY | IBM Middleware, Mainframe, PowerPC |
| How is the application accessed? | Internet access/Web portal or API |
| Are external services in use? | - |
| Application’s (Middleware) | Oracle, WebSphere, MQ |
| Business Function |  |
| Is this application mission critical? | Yes |
| Number of hosts monitored (appx.) |  |
| Number of containers monitored (appx.) | - |
| Number of cloud services monitored (appx.) | - |

|  |  |
| --- | --- |
| Current Monitoring | |
| Today we are ... | |
| … monitoring with | EUM Truesight,-- |
| … tracing with | None |
| … analyzing logs with | None |
| … create dashboards with | None |
| … doing synthetic monitoring with | None |
| … monitoring end users with | None |
| … running load test with | N/A |
| … running CI/CD with | None |
| … deploying | - |
| … missing the following in our monitoring |  |

## 

|  |  |
| --- | --- |
| Technology Stack | |
| The technology stack which is used during this POC. Including versions. | |
| Programming languages / runtimes | - |
| Frameworks | - |
| Web & Application Server | - |
| HTTP Clients | - |
| Database Clients | - |
| Caching | - |
| Logging Frameworks | - |
| Container Technology | - |
| Orchestration | - |
| Service Mesh | - |
| Operating Systems | - |
| Cloud Services | - |
| Datastorages | - |
| Middleware | - |
| Messaging & Async Technologies | - |

# Roles & Responsibilities

Assignment of specific people to these roles is of critical importance to the success of this POC.

### **CSX** Responsibilities

Delay or failure by CSX to fulfill their responsibilities may result in an adjustment to the terms of this DOU, including, but not limited to, an increase in the time required to complete the project.

CSX accepts responsibility to:

* Provide IBM with comments on this DOU.
* Provide IBM with comments on the POC results presentation.
* Attend regular project status calls.
* Provide information, data and decisions to the IBM Focal Point as soon as possible wherever possible.
* Provide resources as required by IBM to validate the use cases.
* Fulfill infrastructure requirements for POC deployment.

POC Project Manager – Responsible for the following activities

The **CSX** Project Manager for this project is **TBD**, and is responsible for the following:

* Managing the scope of the project in conjunction with the IBM Project Manager.
* Attending project status meeting(s).
* Resolving project impacts should CSX need to change plans.
* Helping to resolve or escalate project issues within the CSX as necessary.
* Monitoring and reporting status on a regular basis to CSX management.
* Coordinating project tasks assigned to CSX personnel for the duration of the project.

Development Team member(s) - Responsible for the following activities

* Responsible for providing a test application as described in Use Cases
* Able to resolve any issues within the environment
* Available for the complete scope of the POC

### **IBM** Responsibilities

The IBM Focal Point for this POC is **TBD**, and is responsible for the following tasks

* + Providing any status related to the progress of the Proof of Concept
  + Conducting project communications with CSX Project Manager,
  + Reviewing and administering any changes related to the Proof of Concept and this Document of Understanding with CSX Project Manager.

The IBM Project Manager for this POC is **TBD**, and is responsible for the following tasks:

* Developing and maintaining this DOU.
* Managing the scope of the project in conjunction with the **CSX** Project Manager.
* Conducting regular project status updates.
* Developing and maintaining the project schedule.
* Maintaining communication with **TBD** project team.
* Acquiring and managing the appropriate IBM resources to complete the tasks of the project.

# Presentation of Proof of Concept Results

IBM will prepare and deliver a presentation describing the POC results to **Refinitv**.

# Completion Criteria

The project will be considered to have been completed when either all the milestones have been reached or the project period has concluded.

# Success Criteria

It is IBM’s assumption that if all the use cases in the scope of this POC are successfully executed and validated, **CSX** will confirm that IBM Solution technically meets/exceeds the needs of the business.

# DOU Review and Acknowledgment

This document is an article of good faith, not a binding legal document.

**ACCEPTED AND AGREED TO BY THE FOLLOWING AUTHORIZED REPRESENTATIVES OF THE PARTIES:**

|  |  |
| --- | --- |
| **IBM Corporation**  **Signed:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Email Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **CSX**  **Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Type/Print Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Title:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Phone Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Email Address**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# CSX and IBM Contact Information

**CSX**

| **Name** | **Role** | Email |
| --- | --- | --- |
| TBD | Sr Technical Lead | |  | | --- | | chris.rink@lseg.com | |  | |  | |

**IBM + Instana**

| **Name** | **Role** | Email |
| --- | --- | --- |
| TBD | IBM AIOps SE | Benjamin.Connor.Van.Dyck@ibm.com |
| TBD | IBM Hybrid Cloud AM&I Account Executive Comm/CSI Industry | Rachel.C.Chandler@ibm.com |