Proof-of-Concept Report

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Abstract

Background: Don & Associates is a financial consultant for small and medium businesses whose HQ is in Maryland. The company has proved to be the rising star of the financial consultant segment with three consecutive years of remarkable capital return on investment. The company balance sheet is also in good standing in terms of capital gain to debt ratio.

Objective: In the next chapter of the company, the leadership decided to expand our services to the Northeast clients. The expansion carries many opportunities for increasing revenue and attracting new clients. However, the risk of budget over run while undertaking this project is also reasonably high.

Method: The IT Division is tasked to conduct research to find an innovative solution to complete the expansion. On the technical front, the IT department agrees that a hybrid Cloud model is the best way to minimize service interruption and keep the cost within budget. We conducted a comparative analysis of the top 3 Cloud providers. We pay particular attention to Cloud providers who have one or more of the following characteristics:

- Already established infrastructure in the Northeast
- Experience with financial clients and financial data
- Well-versed in financial requirements and regulations
- Currently offering Cloud services to other financial entities
- Best fit Don & Associate company profile and future need
- Flexible or reasonable pricing model

Result: Among the top 3 cloud providers, AWS Cloud services satisfied all the requirements.

Conclusion: AWS's flexibility in both pricing models, ease of usage, highly scalability make AWS stand out as the top choice for hybrid cloud adoption. This will not only solve our current problem with budget and space but also provide us leverage when solving our future business problems.

Introduction

Don & Associates is a financial consultant providing services to small- and medium-sized companies. The company is currently expanding to the Northeast and looking for an innovative way to tackle the challenges that this opportunity is bringing along. Since the company still houses an on-premise server, a second office will question our current IT support infrastructure's capabilities and capacity. This problem can be overcome by expanding our current server or stand up another server on the second site. However, this approach will call for significant spending. Additionally, in our best guess estimate, we cannot forecast certainly how many clients we will be serving in the first quarter after the second office opening. Therefore, both the workload and complexity of tasks are still somewhat in the abstract region.



The likelihood of the newly upgraded, state-of-the-art server being over or underutilized remains the greatest concern from a technical standpoint.

Statement of Need

The cost of acquiring additional equipment and maintenance is among the most popular concerns during the planning phase. Even when we choose not to stand up another onpremises server at the second site, the cost to expand and run the current server can still be significant. Furthermore, the company may need to expand its IT division to manage the new IT infrastructure.

In terms of physical location, Don & Associates will need to look for new office space to establish a branch office in US Northeast. If we use the current layout of Don & Associates HQ as a point of reference, even a lite version still needs upfront cost and ongoing expenditure. If Don & Associate does not proceed with caution, the operational cost can drive up quickly and diminish any revenue significance.

On the other hand, Cloud adoption offers multiple benefits

- 1. Minimal IT hardware is needed, and less space requirement
- 2. Don & Associates IT can maintain two sites with assistance from Cloud IT support.
- 3. Remote access can be performed with ease
- 4. Keep the bottom line in check while maintaining scalability on demand
- 5. Leadership and management can now fully focus on business and operation.

Assumptions

This report is written under the following assumptions:

- 1. Don & Associates only has one office, which is its headquarters in Maryland.
- 2. Don & Associates already conducted the preliminary survey to determine the potential market in US Northeast.
- 3. Don & Associates has an on-premises server with essential technology infrastructure to run the server.
- 4. Don & Associates has been a profitable company for many years in a row and looking into expansion to a new region. This means commercial loan may be needed but not to the impact level
- 5. Don & Associates will open at least one more branch office in the US Northeast and will need additional office space and staff (IT and Operation).
- 6. Don & Associates has a small internal IT team, which consists of 3-5 members. Two of those will be sent to the new branch office, at least during the initial phase.
- 7. Most of the devices in Don & Associates are Windows-based.



8. C-suite and higher management need to be able to remotely access the company data for teleworking and business strip.

Description of Current Infrastructure

Don & Associates is currently operating internal networks and on-premises servers. The company also has some other technology and infrastructure support staff workstation and servers. All of the company workstations use Window based OS and software. The company will migrate around 50-70% of its data and workload into the Cloud environment. The current on-premises server will be converted to process and store data that must be performed on-site by regulation.

Cloud Service Providers

- 1. IBM Cloud solution
- 2. Microsoft Azure
- 3. Amazon AWS

IBM Cloud solution

Service models (i.e., SaaS, PaaS, laaS): Offer laaS, PaaS

Services:

AI / Machine learning, Analytics, Automation

Blockchain, Compute, Containers

Databases, Developer Tools, Integration

Internet of Things (IoT)

Logging and monitoring

Networking

Quantum, Security, Storage

Pricing: Fixed/Metered/Reserved/Tiers. Has Lite and Free tier pricing option [2].

Accessibility: IBM Cloud Console [3]

Technical support: Basic/Advanced/Premium [4]



Global infrastructure: present in the Americas, Europe, and Asia. In the US Northeast, IBM Cloud infrastructure is available in Washington DC as Multizone Region (MZR) and four single data centers [5].

Advantage: offer neat services and features to kickstart a cloud architecture

Disadvantage: somewhat rigid pricing model that requires the client to be pinpoint on their workload and forecasting. More suited for established clients.

Microsoft Azure

Service models (i.e., SaaS, PaaS, IaaS): IaaS, PaaS, SaaS

Services:

AI / Machine learning, Analytics

Compute, Containers

Databases, Developer Tools, DevOps

Hybrid + multi-cloud

Identity, Integration, Internet of Things (IoT)

Management and Governance, Media, Migration, Mixed Reality, Mobile

Networking

Security, Storage, Virtual Desktop Infrastructure, Web

Pricing: Pay per usage calculates by-product in use x loads x duration.

Price by product/service use which added up to the Total cost of Ownership or (TOS) [7]

Accessibility: has pre-built cloud architectures, Microsoft Azure Portal [8]

Technical support: Basic, Developer, Standard, Professional Direct [9]

Global infrastructure: Available globally in the form of geolocations. There are nine US regions, of which three are located on the East Coast [10]

Advantage: from Microsoft, highly compatible with the company hardware and software, broad infrastructure both domestic and international.

Disadvantage: Licensure of independent services could increase costs; some services are priced higher than other providers



Amazon AWS

Service models: IaaS, PaaS, support SaaS transformation

Services:

Analytics, Application Integration, AR and VR

Blockchain, Business Applications, Compute, Cost Management, Customer Engagement

Database, Developer Tools

End User Computing, Game Technologies, Internet of Things (IoT)

Machine learning, Management & Governance, Media Services

Migration and Transfer

Mobile, Networking & Content Delivery

Robotics, Satellite, Security, Identity & Compliance, and Storage [11].

Cloud solution for Finance is available.

Pricing: On-Demand Instances, Saving Plans, Spot Instances, Reservation with Free tier.

Price by product/service use which added up to the Total cost of Ownership or (TOS) [12, 13]

Accessibility: AWS Management Console

Technical support for companies: Developer, Business, Enterprise On-Ramp, Enterprise [14]

Global infrastructure: 29 launched Regions with multiple Availability Zones [15].

33 Availability Zones + 39 Edge locations + 2 Regional Edge in Europe / Middle East / Africa.

25 Availability Zones + 44 Edge locations + 2 Regional Edge in North America. Nine on the East Coast US

29 Availability Zones + 34 Edge locations + 2 Regional Edge in Asia Pacific and China

3 Availability Zones + 4 Edge locations + 1 Regional Edge in South America

Advantage: Exceptional flexibility in service, dominant presence globally with dense infrastructure in US Northeast. Excellent pricing models allow highly adaptive scaling.

Disadvantage: NONE



Project Details

Building a VPC on AWS

- 1. In the search box to the right of **Services**, search for and choose **VPC** to open the VPC console.
- 2. Begin creating a VPC.
 - a. In the top left of the screen, verify the **New VPC Experience** is toggled *on*. If it is not, toogle it on now.
 - b. Choose the VPC dashboard link, which is also towards the top left of the console.
 - c. Next, choose Create VPC.

Note: If you do not see a button with that name, choose the Launch VPC Wizard button instead.

- 3. Configure the VPC details in the VPC settings panel on the left:
 - a. Choose VPC and more.
 - b. Under **Name tag auto-generation**, keep *Auto-generate* selected, however change the value from project to lab.
 - c. Set the IPv4 CIDR block
 - d. Choose Number of Availability Zones
 - e. Choose Number of public subnets
 - f. Choose Number of private subnets
 - g. Expand the Customize subnets CIDR blocks section
 - i. Set Public subnet CIDR block in selected Region
 - ii. Set Private subnet CIDR block in selected Region
 - h. Set **NAT gateways**
 - i. Set VPC endpoints
 - j. Keep both **DNS hostnames** and **DNS resolution** *enabled*.
- 4. In the *Preview* panel on the right, confirm your configured settings.
 - a. **VPC:** Name of VPC
 - b. Subnets:
 - i. Region
 - 1. *Public* subnet name:
 - 2. Private subnet name:



c. Route tables

d. Network connections

5. At the bottom of the screen, choose Create VPC

The VPC resources are created. The NAT Gateway will take a few minutes to activate.

Please wait until *all* the resources are created before proceeding to the next step.

6. Once it is complete, choose **View VPC**

The VPC is basically created at step 5. To make the VPC fully functional and secured please refer to the following steps as needed.

- ✓ Step 6 through 15 cover how to set up additional subnets after creation.
- ✓ Step 16 through 20 cover how to configure the security group for the newly created VPC.
- 7. In the left navigation panel, choose **Subnets**
- 8. Choose Create subnet, then configure

VPC ID: (select from the menu).

Subnet name: choose a subnet name

Availability Zone: select which availability zone the subnet will be in

IPv4 CIDR block: designate a block for this subnet

- 9. Choose Create subnet
- 10. In the left navigation panel, choose Route tables
- 11. Select a routable created earlier; ensure to select a private routable when configuring private subnets and a public routable when configuring public subnets
- 12. In the lower pane, choose **Routes** tab
- 13. Choose the **Subnet associations** tab
- 14. Choose Edit subnet associations
- 15. Select all subnets that you want to associate with this routable
- 16. Choose Save associations
- 17. In the left navigation pane, choose **Security groups**.
- 18. Choose **Create security group** and then configure:

Security group name: Web Security Group

Description: Enable HTTP access

VPC: choose the VPC

- 19. In the Inbound rules pane, choose Add rule
- 20. Configure the following settings:



Type: HTTP

Source: Anywhere-IPv4

Description: Permit web requests

21. Scroll to the bottom of the page and choose Create security group

Launching a Web Server on AWS

- 22. In the search box to the right of **Services**, search for and choose **EC2** to open the EC2 console.
- 23. From the Launch instance menu choose Launch instance.
- 24. Name the instance.
- 25. Choose an AMI from which to create the instance:
 - ✓ The type of *Amazon Machine Image (AMI)* you choose determines the Operating System that will run on the EC2 instance that you launch.
- 26. Choose an Instance type:
 - ✓ The *Instance Type* defines the hardware resources assigned to the instance.
- 27. Select the key pair to associate with the instance:
 - a. From the **Key pair name** menu, select **vockey**.

The vockey key pair you selected will allow you to connect to this instance via SSH after it has launched. Although you will not need to do that in this lab, it is still required to identify an existing key pair, or create a new one, when you launch an instance.

- 28. Configure the Network settings:
 - a. Next to Network settings, choose **Edit**, then configure:

i. **Network:** *network name*

ii. **Subnet:** choose a public subnet

iii. Auto-assign public IP: Enable

- b. Next, you will configure the instance to use the *Web Security Group* that you created earlier.
 - i. Under Firewall (security groups), choose **Select an existing security group**.
 - ii. For Common security groups, select Web Security Group.
- ✓ This security group will permit HTTP access to the instance.
- 29. In the *Configure storage* section



- 30. Configure a script to run on the instance when it launches:
 - a. Expand the **Advanced details** panel.
 - b. Scroll to the bottom of the page and then input the code into the **User data** box.
- 31. At the bottom of the **Summary** panel, on the right side of the screen, choose **Launch Instance**.
 - ✓ You will see a Success message
- 32. Choose View all instances
- 33. Wait until the EC2 instance show 2/2 checks passed in the Status check column
- 34. Select the launched instance that you have been working on
- 35. Copy the **Public IPv4 DND** value shown in the Details tab at the bottom of the page
- 36. Open a new browser tab, paste the **Public DNS** value, and press Enter
 - ✓ You should see a web page display.

Challenges Encountered

No challenges were encountered while building VPC.

Conclusion

An AWS Cloud Migration will solve the current challenges in both the short and medium term. We remain in control of what service we are using and how much data or workload will be processed outside the company parameter. With AWS Technical Support onboard, we can ensure that our process and operation will be running at maximal availability and constantly monitored 24/7. The hybrid migration will also complete the second objective, which is keeping costs low and strengthening the bottom line. Since AWS allows us to expand and contract our Cloud architecture on demand, we can save a lot of energy and resource by not having to do guesswork.

Last and most importantly, we, who operate as financial consultants, must be a living example of our business model. We have been proving to our clients many times in the past and up until now that Don Associate is one of the most trusted names in small/medium business finances. Our clients have been benefiting greatly from our sounded advises when making strategic decisions. Don & Associates has always been right there with our clients and partners. We understand the sector and business as if we have helped build the businesses since Day 0. This is the moment where Don & Associate demonstrate to our clients, current, and future, that we can also walk the walk. An AWS Cloud offers an elegant solution to our challenges and opens many new pathways that we can take to complete our journey.



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Appendix - Screenshots

Start Lab

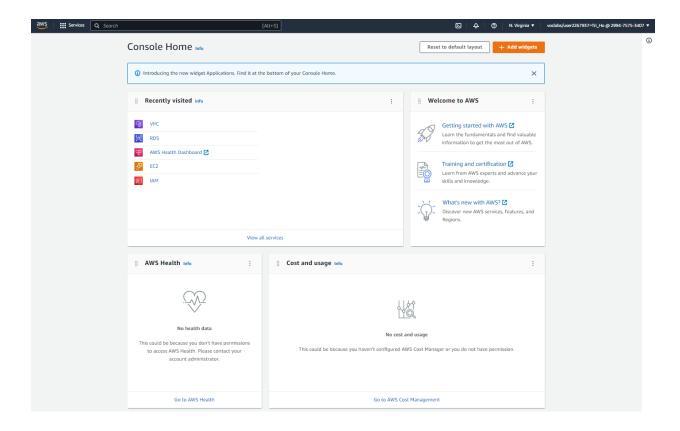


Source: AWS



AWS Management Console Name

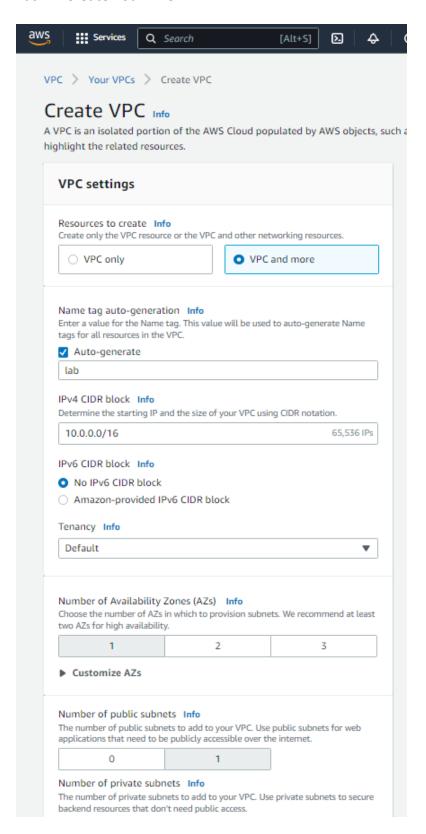
Include a screenshot of the following page to show your name.



Source: AWS



Task 1: Create Your VPC

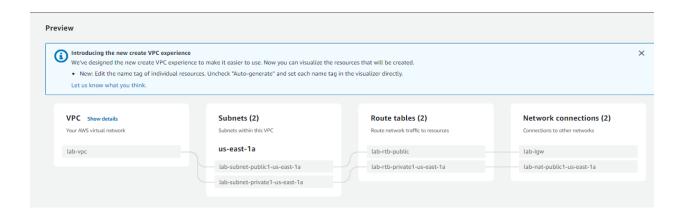


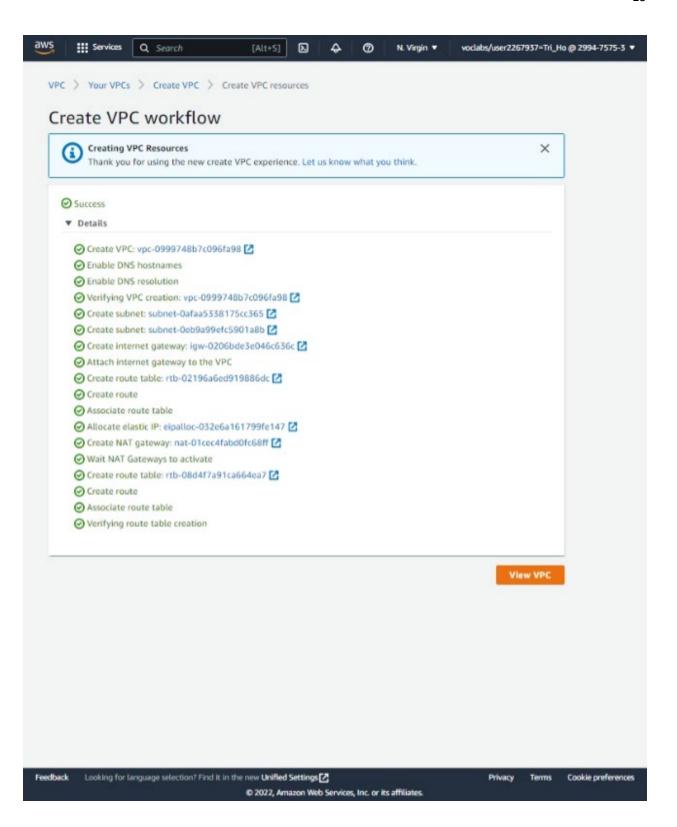


Number of public subnets Info The number of public subnets to add to your VPC. Use public subnets for web applications that need to be publicly accessible over the internet. Number of private subnets Info The number of private subnets to add to your VPC. Use private subnets to secure backend resources that don't need public access. 2 ▼ Customize subnets CIDR blocks Public subnet CIDR block in us-east-1a 10.0.0.0/24 256 IPs Private subnet CIDR block in us-east-1a 256 IPs 10.0.1.0/24 NAT gateways (\$) Info Choose the number of Availability Zones (AZs) in which to create NAT gateways. Note that there is a charge for each NAT gateway In 1 AZ 1 per AZ None VPC endpoints Info Endpoints can help reduce NAT gateway charges and improve security by accessing S3 directly from the VPC. By default, full access policy is used. You can customize this policy at any time. None S3 Gateway DNS options Info Enable DNS hostnames Enable DNS resolution Additional tags

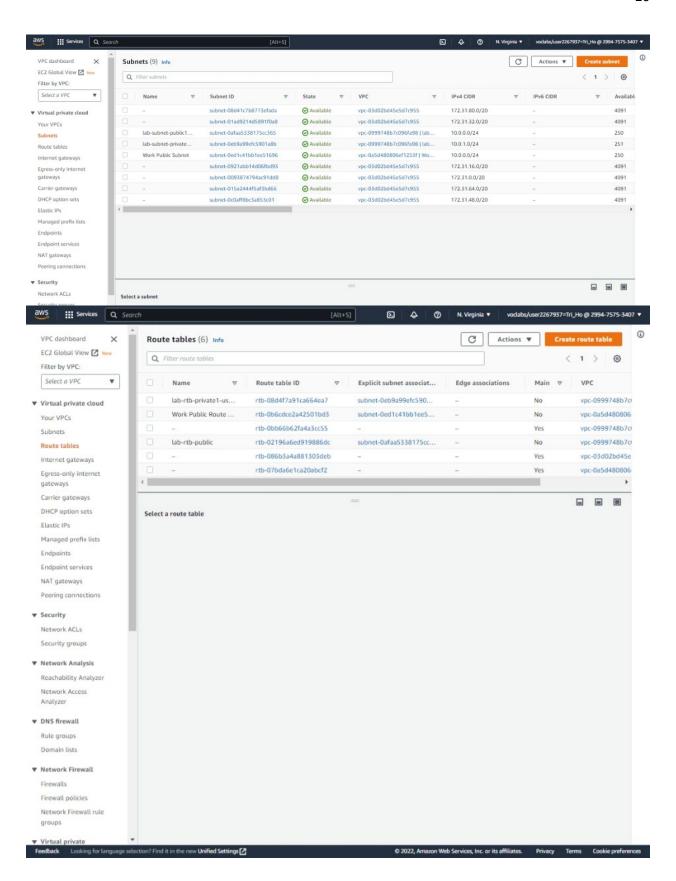
Create VPC

Cancel



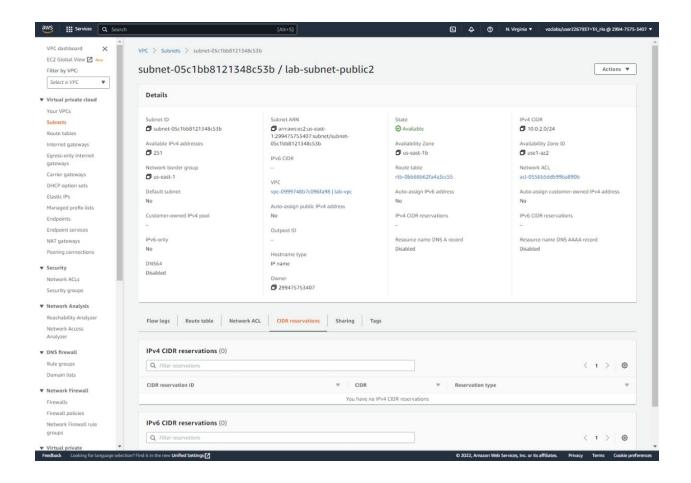




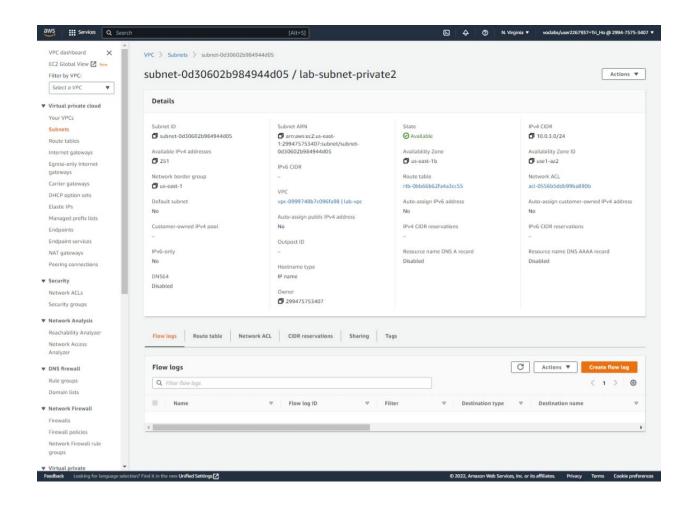




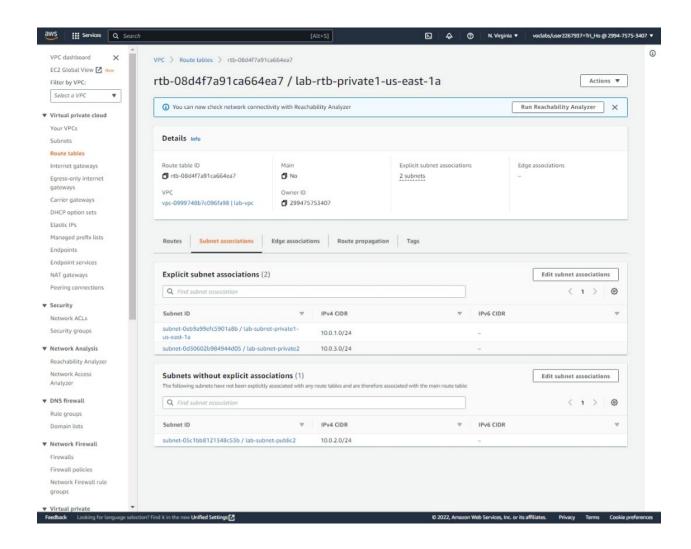
Task 2: Create Additional Subnets



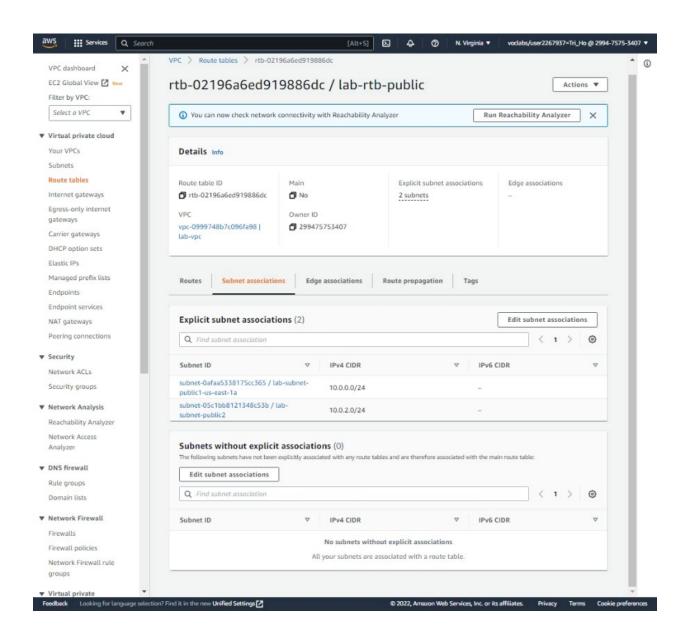






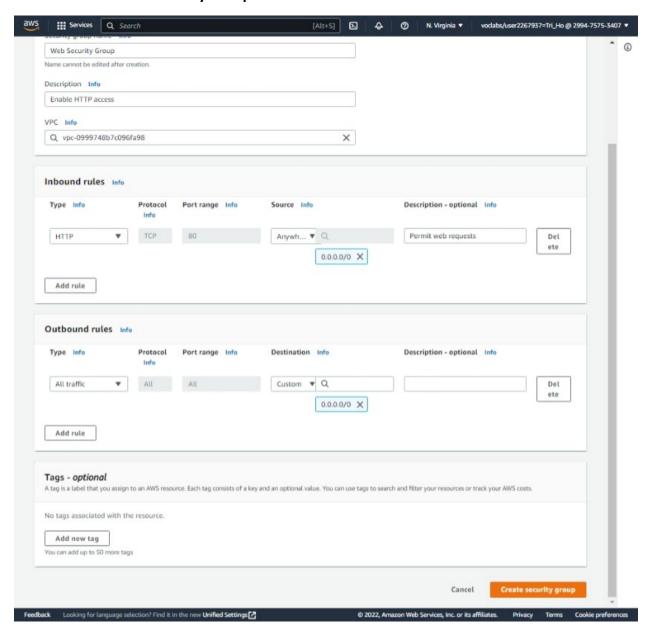




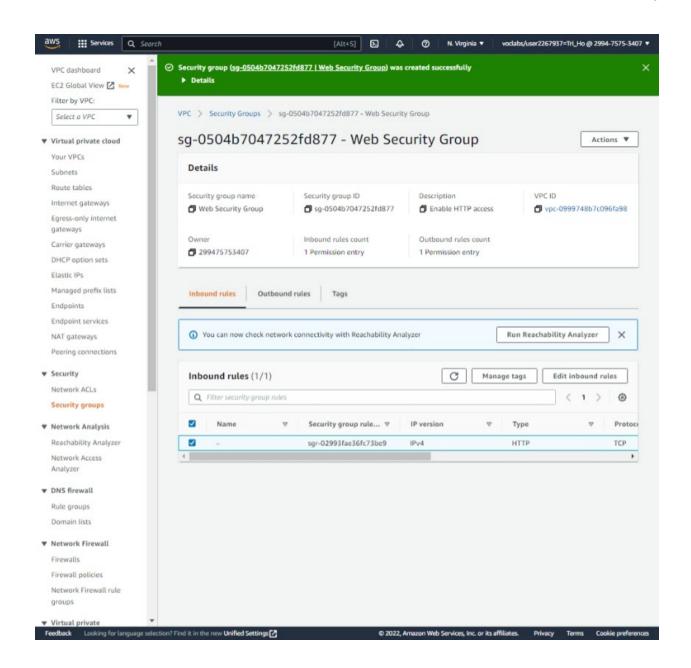




Task 3: Create a VPC Security Group

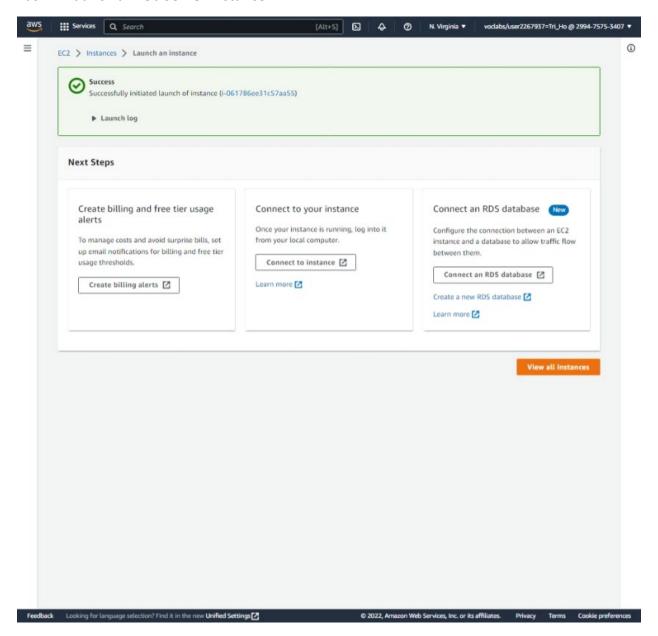




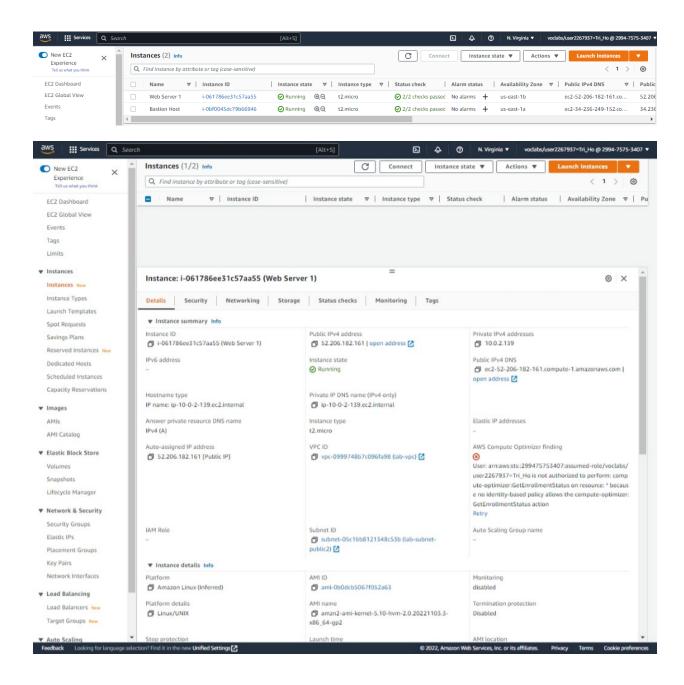




Task 4: Launch a Web Server Instance











Lab Complete

