EXECUTIVE SUMMARY

The end user experience monitoring market has traditionally served two masters: the Web business marketing side, mainly concerned with client satisfaction, and the IT operations area, which mostly focuses on application performance and service delivery. One particular focus of the IT operations side of the market has been incident and problem management, especially when combined with an application performance management (APM) solution. As customer-facing applications focus heavily on J2EE and .NET, the market now tends to favor server-side passive technologies that can provide more detailed information about application errors, performance problems, and user behavior. This, however, does not preclude a re-emergence of desktop-based passive agents, especially when looking at Citrix- or Microsoft RDP-based applications. As vendors focused their own technological “comfort zone” on either the business or on IT operations, many users face a situation in which they need to deploy two or more solutions to serve all constituencies. New announcements show that while this submarket separation is still largely the case, bridging solutions may be on the horizon.

END USER EXPERIENCE MONITORING STILL FOCUSES ON IT OPERATIONS

Two recent announcements show that there’s still a strong market focus on IT operations:

- **Oracle is stealthily building its management capabilities.** Oracle Enterprise Manager 10gR4 has a new J2EE performance management solution called Oracle Application Diagnostics for Java, which brings a new approach to managing application performance. Unlike competitor products, this solution does not use bytecode instrumentation and reduces the overhead associated with J2EE application monitoring. The solution also features a database transaction tracing capability that ties Java transactions to the database session. To complement this new solution, Oracle has acquired Moniforce, an Amsterdam-based company specializing in end user experience monitoring appliances and software. This acquisition signals that: 1) Oracle is really serious about Enterprise Manager, and 2) Oracle’s solution now has all the bells and whistles — and more — found in competitor products from the likes of Compuware, HP BAC, Precise i3, Quest, and Wily Introscope. Oracle’s dominance of the database and application market makes Enterprise Manager a potential leader in the APM space.

- **Aternity focuses on integration and correlation.** Aternity collects data through a desktop-based agent, which provides information on end-to-end user response time, fractional times for applications (desktop to server, server to application server, and application server to database), user productivity, and load metrics, as well as desktop environmental data. By itself, this fits into
the existing market alongside products from Knoa, Serden, and others. What makes it different is the aggregation of the data collected at the end user level with the data collected on the infrastructure itself (server, app server, database, and mainframe) and the feeding of this data into an analytical engine that alerts, analyzes, and identifies problems before they affect frontline users. This removes one of the main obstacles to the use of response time in IT operations outside of the APM space: This correlation and analysis is what is needed to elevate response time to a generic IT operations monitoring parameter that complements other, more traditional indicators, such as CPU load and memory usage.

These two solutions clearly focus on IT operations, application performance, and, in Aternity’s case, capacity planning. But bridging the business-to-IT-operations gap may be on the horizon.

**Bridging The Business-To-IT Operations Gap**

Triometric is a UK-based company created in 1999; it deployed its Web Analyzer product for the first time in 2000. Focusing on direct sales in Europe, Triometric has some outstanding references for B2B monitoring and enterprise applications in the finance and travel verticals.

Triometric Analyzer is essentially a typical server-side, appliance-based, packet-decoding solution, but it differs in how it analyzes and reports the collected data. For example, optional tools like the XML analyzer provide insight into transactions, and Triometric reports are used both by the business to identify its most valuable clients as well as by IT operations to identify performance issues.

Triometric, like Moniforce before its acquisition, essentially focuses on the European market, but it is open to licensing Web Analyzer to US-based distributors.

**The Rebirth Of Precise Software Challenges Oracle And CA**

Precise Software was one of the early APM solutions; it was particularly outstanding because of the database performance management that complemented its J2EE and .NET monitoring. Precise i3 offered both active agent monitoring and desktop passive agent monitoring as part of a vertically integrated package. It is now back on the market as an independent company.

**SUPPLEMENTAL MATERIAL**

**Companies Interviewed For This Document**

Aternity

Oracle

Symantec/Precise Software

Triometric
ENDNOTES

1 Moniforce is a European provider of analytic and business metric solutions, enabling customers to
determine the success of mission-critical Web applications and online initiatives. Headquartered in
Almere, the Netherlands, the company had 70 staff and satellite offices in Germany and Belgium. Its
performance monitoring solution, webProbe, is complemented by a number of other products in similar
spaces: webSensor, an analytics package; webStress, infrastructure stress testing; and webAlarm, Web
site availability checking. To expand its marketing worldwide, Moniforce has created an affiliate called
UXtechnology to market a repackaged version of its appliance product as UXinsight. See the June 21, 2007,

2 Our experience with IT organizations interested in end user management shows that they may eventually
need several products to cover all their own requirements and the requirements that other constituencies,
such as business managers, may give them. While this is technically possible, the redundancy of data
collection is painfully obvious and will become increasingly unacceptable for many potential clients. IBM
Tivoli has created a conceptual framework with ITCAM that provides the capability for several types of
reporting servers to collect data from a unique source. Triometric’s concept is to provide ad hoc reporting
from a single source to different user types. See the August 3, 2007, “Key Vendor Takeaways From
Forrester’s Wave™ On Appliance-Based End User Experience Monitoring” report.