



# Back at the Track

**TUG's MoM  
returns to  
Woodbine**

**May 19, 2004  
Meeting of Members**

**5:00pm**

**Dave Smith: PIPED act**

**7:00pm**

**Dale Perkins:  
IBM Announcements**

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for Midrange Systems

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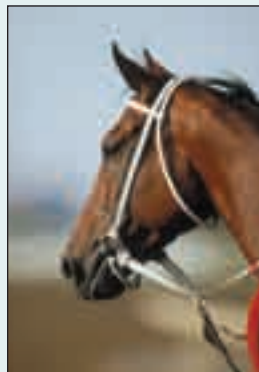
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## TUG eServer magazine

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# President's Corner

By *Eveline Gaede*,  
President, Toronto Users Group for Midrange Systems



## Why Golf and IT are Similar!

Spring is finally here (although someone might want to mention that to the weather man) and golf season will soon begin. Woo-hoo! At TUG, we celebrate the season (and our iSeries community) with our annual golf tournament. Our 16<sup>th</sup> tournament will be held on June 18<sup>th</sup> at Nobleton Lakes. If you have attended in the past, you know it is a great day to have some fun, network with fellow iSeries professionals and perhaps win some nice prizes!

I am an avid golfer but am faced with a bit of a problem this year. To put it bluntly, my game sucks! My problem lies in the fact that now that I am in my third year, I can no longer use the excuse of being a “beginner golfer” to explain my high scores. I am hoping that over the winter, my golf skills went through an osmosis and somehow developed into some level of efficiency. What are the chances?

What is confusing is that I have been told I have a nice, professional swing! So why can't the golf ball realize this and cooperate? This very frustrating fact made me think about the many ways that IT and golf are really very similar.

With golf, you know exactly the outcome you want and on occasion you actually achieve it. Yet you often find yourself spending an entire day on the simple task of putting a ball in a hole, with nothing to show for it – except an overwhelming feeling of frustration. How many times have you been faced with a “simple” programming problem where after hours of coding and testing, the solution was just beyond your reach, leaving you with that same frustrated feeling? Yet, write a good piece of code (or sink a 20 foot putt) and it will leave you smiling for days.

Face it, golfers and IT professionals are suckers for punishment – and we keep coming back for more.

Both IT and golf are head games – with IT, you are controlled by a computer and with golf, that little white golf ball keeps you firmly in its grip. IT professionals are at the mercy of the whims of our users; golfers are at the mercy of the environment. And the most frustrating part, no matter how good you are at solving problems (at the game), you will never completely conquer the computer (the course).

And what about the new equipment that comes out every year – promising an increase in performance? This performance boost usually only lasts until you add more software (or pick a tougher course). The only given with new equipment is that huge outlay of cash and the prospect of buying new again the following year! The reality is that expensive golf equipment will not improve your game if you don't have the proper skill set. And expensive computer equipment is not always the answer to your problems; perhaps better procedures or skills are the answer.

How you approach a problem (and your success ratio) is very similar in IT as it is at the golf course. Imagine you are on the tee blocks for a par 5 with a long narrow fairway and a huge pond directly in front of you. A rookie golfer will focus only on the pond, convinced that their ball will be going directly into it. And sure enough, that is exactly what happens. The focus should be on the target and where you want to end up. In IT the same thing happens – you are faced with a big problem but you can't get over the hurdles that are directly in front of you. Focus on the solution and then tackle the hurdles one by one, always keeping your eye on the goal.



*Eveline Gaede*

Nice, slow and steady, well-thought-out shots down the middle of the fairway wins the game. Wild, quick shots take you off track into bushes, ponds and that dreaded environmental hazard – fescue (just by the sound of that word, you know it has got to be evil). With programming, wild, quick solutions often end with disastrous results leaving you further behind, trying to get out of the mess (fescue) you have created.

Finally, how often have you felt like throwing your computer out the window and your golf clubs into the lake? And what about the strain on personal relationships? Can you honestly say you have never said “But honey, I'm SO close... Only a couple more hours at the computer (on the course) and I'll get it!”

But no matter how many similarities I can find, there is one very big difference between the two – and that is that a bad day at the golf course is STILL better than a good day at the office! So on June 18<sup>th</sup>, you'll find me at Nobleton Lakes – but don't look in the fairways, try looking in the fescue and the woods! Why don't you plan on joining us – after all, golf and IT are so much alike! By the way, if anyone can think of some good excuses that I can use to explain my lack of ability for this third year of my golf career, I would be interested in hearing them!



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# An Overview of the Personal Information Protection and Electronic Documents Act for Businesses and Organizations



Canadian businesses need to be fully aware of how the new private sector privacy law, the Personal Information Protection and Electronic Documents Act – or PIPED Act - will affect their business. This article explains why implementing good privacy practices simply makes good business sense.

As business owners, managers and employees, we are all concerned that our businesses, as well as the ones that we work with, are well managed, competitive and profitable. As of January 2004, we also have to be concerned about protecting the privacy of our customers. This is because, as of January 1, all businesses in Canada that collect, use and disclose personal information have to comply with either the **PIPED Act**, new legislation implemented by the federal government to protect the privacy of Canadians in the private sector, or with a substantially similar provincial law.

The PIPED Act sets out ground rules for how private-sector organizations may collect, use and disclose personal information in the course of their commercial activities. There are some businesses that may already be familiar with the PIPED Act because they are already engaged in activities covered by the Act – such as sharing information across borders, for example. But for those of us who aren't yet familiar with it,

there's no time like the present – because in the next few months this will be the business environment in which we will all be operating. The PIPED Act is good news for Canadians and for businesses, and hopefully this article will allay any fears or concerns you may have about its implementation.

## What is Privacy?

\* **The Office of the Privacy Commissioner of Canada defines the right to privacy as: “The right to control access to one’s person and information about oneself.”**

Privacy is often called “the right to be let alone”. That's a good enough definition, as far as it goes. It reflects people's instinctive reaction to being monitored or scrutinized or bothered. That's what “invasion of privacy” means to many people. But there's another kind of privacy invasion that's less obvious, and that's the collection, use and disclosure of information about us without our knowledge or consent.

That's why the Office of the Privacy Commissioner of Canada defines privacy as the right to control access to one's person and information about oneself. This definition is useful for understanding how our privacy is becoming threatened. After all, our privacy used to be protected by default. As long as information about us was in paper records scattered over a lot of locations, someone would have had to go to a lot of trouble to invade our privacy. Unless you were famous or important, or “notorious”, your privacy was pretty safe.

But those barriers of time, distance and cost are gone. With developments in computing technologies, databases, surveillance technologies, biometric identification and genetic testing, a stranger with access to a computer and an Internet connection can compile a detailed file on our whole lives in a matter of minutes. This scenario exemplifies at a broad level why we need to be concerned about protecting our privacy. ▶

**Your privacy is our concern.**

Canada has a new law to protect our privacy. No federally regulated business (such as a bank or a telephone, telecommunications or transportation company) can now collect, use or disclose your personal information without your consent. Your right to check information about you and have it corrected is protected under the law. An independent ombudsman, the Privacy Commissioner of Canada is at your service to investigate complaints relative to Canada's privacy laws. Your privacy is your business. Ours is making sure that it stays that way.

Privacy Commissioner of Canada  Commissaire à la protection de la vie privée du Canada

For more information, call 1 800 282-1376 or visit [www.privcom.gc.ca](http://www.privcom.gc.ca)

## Why is Privacy Important?

Our privacy, because it is a fundamental right, is sometimes called “the right from which all our freedoms flow”. You can’t have freedom of speech, association, or thought, for example, in a society where your every move is watched, your every activity known, and your every preference monitored. Privacy is an innate need. When you go home at night, you probably close the blinds. It’s not that you’re trying to hide something. You just instinctively need your privacy, your freedom from being observed.

In Canada we have the right to anonymity as we go about our business. That is why we, as individuals, businesses and as a society, must be prepared to go to



considerable lengths to ensure that our privacy and the privacy of our clients and customers is respected in our commercial activities. Which brings us to the PIPED Act, because one of the ways that Canadians have responded to the challenge of privacy protection is to legislate to protect privacy.

## Why is Privacy Good Business?

Adhering to good privacy practices simply makes good business sense. If people don’t trust businesses, if they see businesses twisting consent or unjustifiably inferring it, they’ll undermine the system. They’ll refuse to give information, or will give false information. They’ll swamp companies with complaints. They’ll reject things

that might be of benefit to them, out of frustration and resentment. And they’ll look for competitors who do respect their privacy. Protecting privacy is a key element of good customer relations and that makes it a key element of competitive advantage.

## The PIPED Act

The PIPED Act is new legislation implemented by the federal government to protect the privacy of Canadians in the private sector. The Act sets out ground rules for the collection, use and disclosure of personal information. The Act reflects the realities of the business world, rather than some abstract Ottawa thinking.

It’s based on the Canadian Standards Association’s Model Code for the Protection of Personal Information. That Code, which is actually incorporated into the legislation, came out of a collaborative effort by representatives of government, consumers, and business groups. These groups met and discussed the development of a code as a way of enhancing the business environment.

Canada is actually the first country in the world to have private sector privacy legislation that is based on a collaboratively-developed national standard. These groups recognized that good privacy is good business, and that protecting their customers’ rights and treating their personal information with respect gave them a competitive advantage.

The Act ensures that an organizations’ legitimate need for personal information can be balanced with the privacy rights of individuals. Where there is oversight, the Office of the Privacy Commissioner of Canada is there to help businesses. The Commissioner’s role is to be an ombudsman, not an enforcer. The Commissioner is interested in finding solutions to privacy problems, not in finding someone to blame for them.

So what is the PIPED Act all about then and what will you have to do to implement it? Basically it means that an organization that wants to collect, use,

## The 5th Wave

By Rich Tennant



“Some of the PIPEDA team members are really taking this privacy legislation seriously.”

or disclose personal information about people needs their consent, except in a few specific and limited circumstances.

- It can use or disclose people's personal information only for the purpose for which they gave consent.
- Even with consent, the organization has to limit its collection, use, and disclosure of personal information to purposes that a reasonable person would consider appropriate in the circumstances.
- Individuals have the right to see the personal information that an organization holds about them, and to correct any inaccuracies.
- There's oversight, through the Commissioner and the Office, to ensure that the law is respected, and redress if people's rights are violated.

A common misconception to be aware of is that some people believe that the PIPED Act applies only to Web sites, e-commerce or businesses operating on the Internet. This is simply not the case.

The Act applies to all businesses whether they conduct their business electronically or not.

### Who is Covered?

Right now, the Act applies to all personal information that's collected, used, or disclosed in the course of commercial activities by federal works, undertakings, and businesses. Those are primarily banks, airlines, telecommunications companies, broadcasters, and inter-provincial or international transportation companies. It also applies to the personal information of employees in those organizations. And it applies to personal information that's held by provincially-regulated organizations when it's sold, leased, or bartered across provincial or national boundaries.

As of January 1, 2004, the Act will apply right across the board – to all personal information collected, used, or disclosed in the course of commercial



activities by all private sector organizations, except in one special circumstance. Where a “substantially similar” provincial law does not apply.

The Minister of Industry expects to that provincial or territorial legislation should incorporate the ten principles of the Schedule 1 of the PIPED Act, provide for an independent and effective oversight and redress mechanism with powers to investigate; and restrict the collection, use and disclosure of personal information to purposes that are appropriate or legitimate. At this point only Quebec has legislation that has been deemed substantially similar. Both BC and Alberta have introduced new legislation, but the final decision rests with the Minister of Industry and the Federal Cabinet. The result will be that the principles of the PIPED Act will be part of the business environment throughout Canada. ▶

## Picture yourself here:

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# THE AGENDA for our next Meeting of Members Wednesday, May 19, 2004



LOCATION: *Woodbine Racetrack*

(at Highway 427 & Rexdale Blvd.) Toronto, Ontario



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## 5:00pm **PIPED act**

**SPEAKER:** Dave Smith, The Waterstone Group Ltd.



*Dave Smith*

**Abstract:**

On January 1, 2004, the Personal Information Protection and Electronic Documents act (PIPEDa) became law for all companies operating in Canada. This act has had a dramatic impact on the way that organizations collect, share, utilize, and retain information about the people they interact with on a daily basis. Specifically, they need to re-engineer all of the business processes “touch” personal information in any way. The presentation will include a high level overview of the legislation and provide an approach that can be applied to your organization to make it PIPEDA compliant. Individual topics will include; establishing a Privacy Office, Policy and Guidelines, Assessment, Risk Analysis, and Training. Throughout the presentation, the presenter will highlight the issues that will require special consideration when you are designing and implementing your PIPEDA program.

**Biography:** Over the past 25 years, **Dave Smith** has assisted many organizations in the design and development of cost effective business solutions. During this time he has led and participated in several process re-engineering initiatives in many functional areas including Legal, Finance, Human Resources, Procurement, Manufacturing, Supply Chain and Information Technology. Dave has focused his career on Business Management, Project Management, Process Re-engineering, and Technology implementation. In 1999, Dave became a founding member of the Waterstone Group Ltd. Since that time, Waterstone has assisted many organizations in reviewing and modifying their business processes enabling them to extract business efficiencies and improve overall process effectiveness.



## 6:00 pm **Intermission**

### TUG Meeting of Members (MoM)

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*Dale Perkins*

## 7:00pm **V5R3 and IBM iSeries Announcements**

**SPEAKER:** Dale Perkins, IBM Canada Ltd.

**Abstract:** Come and find out all of the latest information regarding the recent IBM announcements for the iSeries product line, including the new chipset and V5R3.

**Biography:** Dale Perkins is a Consulting IT Specialist with IBM. He is an iSeries Specialist who focuses on Server Consolidation which includes Linux and Windows integration. He was also the IBM Liaison for TUG for a number of years. Dale can be reached at 416-433-7699 or via email at [dperkins@ca.ibm.com](mailto:dperkins@ca.ibm.com).



**What topics would you like to see in future? Drop us a line with your suggestions at: [leo@tug.ca](mailto:leo@tug.ca)**



## ► Personal Information

Personal information includes any factual or subjective information, recorded or not, about an identifiable individual. This includes information in any form, such as:

- age, name, ID numbers, income, ethnic origin, or blood type;
- opinions, evaluations, comments, social status, or disciplinary actions; and
- employee files, credit records, loan records, medical records, existence of a dispute between a consumer and a merchant, intentions (for example, to acquire goods or services, or change jobs).

Personal information does not include the name, title, business address or telephone number of an employee of an organization.

### Employee vs. Customer Personal Information

The application of the Act will expand in 2004 to commercial activities that normally fall under provincial jurisdiction. But it won't extend to employment in those activities. The only place the PIPED Act will apply to employment will be in federal works, undertakings, or businesses. This means that if you are operating a federal work, undertaking or business – the PIPED Act is going to apply to your employment practices. But for the rest of businesses, it will not. It's a good idea for businesses and organizations to review their privacy practices in employment anyway, because it's very likely that provincial privacy laws will apply to employment.

### Preparing for the Act

This brings us to a few steps that businesses can take to prepare for the Act.

**First**, review your privacy practices now, so that you can review your current situation and affect any changes that are needed. You should consider applying this practice to your employment practices also. Because it's very likely that provincial privacy laws will apply to employment.

**Second**, appoint an individual to have overall responsibility for privacy throughout your organization. In large organizations, the Chief Privacy Officer fills this role, but for most businesses, it would be reasonable to have an individual fulfill this role as a part-time responsibility. This would assure that your privacy responsibilities and issues are addressed.

**Third**, familiarize yourselves with the role of the Office of the Privacy Commissioner of Canada. They can help you understand what you can do to get ready for the implementation of the Act.


### Role of the Privacy Commissioner of Canada

The Privacy Commissioner is an independent Officer of Parliament. The first major aspect of the Commissioner's mandate is oversight. That includes investigating and adjudicating com-



plaints under the PIPED Act and the Privacy Act, which is a similar law that has applied to the federal public sector for the last twenty years. The second major aspect of the Privacy Commissioner's mandate is public education – to raise awareness among Canadians about their rights, and organizations their obligations, under federal privacy laws.

### Conclusion

The PIPED Act came about because the government recognized that the lifeblood of modern business is personal information. Businesses depend on personal information, to stay in touch with their customers, seek out new customers, and find out what the market is looking for and what it will bear. And they want information about their employees, so that they can administer benefits and ensure a safe and productive workplace. The proper treatment of personal information is key – it helps to maintain a business' image, gains and retains the trust of customers, assures that there is accurate information for marketing purposes and ultimately gives the business a competitive advantage in the market place. We can see, that **good privacy is, in the end, good business**. And that may be the most important implication of Canada's new privacy law. 

*For more information you can contact the Office of the Privacy Commissioner of Canada at 1-800-282-1376 or visit their Web site at [www.privcom.gc.ca](http://www.privcom.gc.ca).*

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# – TUG MoM Review –

## The March 2004 Meeting of Members

By Stephen Bingham

Our March meeting of members was an event not to be missed. On this night we had 4 speakers. The topics of discussion were (1) “Sarbanes-Oxley / Bill C-198” and (2) “Remote System Explorer (RSE).” The meeting was opened with greetings from **Ken Sadler** who is a member of the TUG Board of Directors.

### SOX is No Laughing Matter

Anyone who has watched the TV news or picked up a newspaper over the past 2 years will recognize the names, Enron, WorldCom and Tyco. These all became household names as their corporate scandals unfolded. In response to these events, the United States government brought into law what has become known as Sarbanes-Oxley. The Canadian equivalent to this legislation is Bill C-198.

Enter our first speaker of the evening, **Bill Smiley** of Illumina Management Solutions. Bill pointed out that the purpose of this law is to prevent the stakeholders of corporations from having to suffer the fallout of similar scandals in

the future and the high price that will be paid for those that do not comply. These penalties include heavy fines, the delisting of the companies stock and possible jail time for the company CEO and CFO.

It would seem natural to seek the advice of internal or external auditors during the implementation of this project. This should be avoided. These individuals play a key role later in the process, and any assistance that they provide may compromise the process as they would in the end be evaluating their own work.

Bill walked us through the many components of the project plan required to bring a corporation’s systems into compliance with this legislation and the role the I.T. will play in the project. These areas will include gaining an understanding of your company’s internal control program and financial reporting processes. Ensure that IT controls are documented, tested and updated regularly to correspond with changes in internal control or financial reporting processes.

For more information about the role of I.T. in corporate governance, check out the following link: [http://www.isaca.org/Template.cfm?Section=About\\_Isaca&Template=/ContentManagement/ContentDisplay.&ContentID=9757](http://www.isaca.org/Template.cfm?Section=About_Isaca&Template=/ContentManagement/ContentDisplay.&ContentID=9757)



**Stephen Bingham**

Our second speaker of the evening was **Wesley Helms** of GSI Group, on the topic of “Technology for Compliance – Overcoming Corporate Alzheimer’s.”

Corporate Alzheimer’s can be defined as follows: “The organizational inability to recall, process or store vital corporate information effectively.”

Wesley defined 3 primary categories to achieve compliance with this legislation.

- 1. Financial Data:** Processes must be put in place that will notify management of discrepancies or missing data. These processes must provide for the creation of detailed financial reports that can receive executive certification.
- 2. Control Repository:** Create and enforce a set of rules that define where information is stored, access privileges and version control.
- 3. Records Management:** Records management can be best defined with these 4 principles:
  - a. Integrity: A record remains unaltered from its creation.
  - b. Security: A record is protected maintaining privacy and confidentiality.
  - c. Authenticity: A record is what is purports to be.
  - d. Accessibility: A record must be accessed in a timely fashion.



**Léo Lefebvre, Bill Smiley, Ken Sadler, and Wes Helms**

Maintaining compliance will be an ongoing process. In order to ensure its success, IT must be encouraged to participate in the overall process.

### Meeting of Members

During the dinner break, **Ken Sadler** made a few announcements including the upcoming election of the Board of Directors. Each year, 6 board members are elected for a 2 year term. Ken then introduced **Glenn Gundermann**, the chair person of the TEC 2004 committee. Glenn provided an update on TEC 2004 and introduced those present to the members of the committee.

After the dinner break, we were joined by **George Farr** and **Phil Coulthard** from Toronto's IBM lab. Not only do they make a great team, but they share a sense of humor that is evidence of too many hours spent in front of a keyboard. Look for them to replace Mike Bullard on late night television this fall.



**Phil Coulthard**

### RSE – The new PDM!

The session started with George giving us a brief history of SEU / PDM through CODE/400 and Remote System Explorer (RSE) in WDSC. George quickly moved to the reason most of us joined the IT world to begin with – the toys. RSE is more than a PC based coding tool for you iSeries. It is the future. Whether you are coding in Java, C/C++, COBOL or RPG; RSE should be at your finger tips.

George walked us through the various features of RSE:

- RSE Perspective: Designed for role-based environment. A collection of editor, views and tools for specific tasks. Use the pre-defined perspectives, or create your own.
- Connect to several iSeries at one time or have several connections to one iSeries.
- IFS: A windows type interface to access folders and files. Create filters to see files in specific folders.
- Create and manage iSeries objects in your QSYS file system.
- RSE User Actions: Create a macro of commands for use in QSYS or QSHELL.
- Customize Compile Commands to meet the needs of your environment.

After George gave us the rundown on the various features of RSE, Phil took center stage to talk about the editors.

The following built in editor functions are available on a pull down menu: Create new Procedure, Prompt, syntax check, program verify, show indent view, show fields of selected F-Spec.


Those making the transition from the green screen they will find the SEU style prefix commands are supported. For those rare occasions, help is at your finger tips with several online references and programming guides included.

Other features include:

- The ability to compare two pieces of code.
- Use of filters so only lines of code that meet your criteria are shown.
- Graphical design tool for DDS WYSIWYG



**George Farr**

The future is not written in stone. But as we saw this evening, it will definitely be interesting. As the effects of legislation like Sarbanes /Oxley take effect, corporations will be increasingly relying on IT to provide tools to ensure the material accuracy of financial statements and document management. Tools like RSE will give IT staff the ability to meet those needs. 

**Stephen Bingham** is the TUG Secretary and works for CGI as an iSeries Technical Analyst. He can be reached at 905-821-2252 ext. 7866, or [Stephen.Bingham@cqi.com](mailto:Stephen.Bingham@cqi.com).



**March MoM door prize winner Matthias Schmidt, with Wende Boddy and Eveline Gaede**

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# Project Management Tales – Get Out of My Way



*Debbie Gallagher*

*By Debbie Gallagher*

*Each story in this series of Project Management Tales is true, but company names have been changed. Some stories occurred in Canada and others took place in the US or overseas.*

## Background

**A**cm Corporation, a manufacturer, was building a new data warehouse with multi-dimensional analysis and reporting capabilities. There were two main teams, one building the technical infrastructure and one developing the multi-dimensional cubes and reports.

The project was already underway when the project manager retired, and a new project manager was hired.

## The Situation

At the first technical team meeting after the assignment of the new project manager, the team lead discovered that his team members had been trying a new approach instead of what had been agreed as the path to developing the technical architecture.

The team members explained that the project manager had decided that they should try a different approach. The team lead spoke with the project manager to find out why he had been left out of the discussion. The project manager was surprised. She had certainly not intended to leave out the team lead. She had been meeting with the technical team on another matter, and an informal discussion on the technical progress had come up and the change in direction had been agreed.

## Action Taken

The team lead pointed out that once the discussion turned to alternative approaches, he should have been involved in the discussion. At the very least, he should have been informed of

the outcome, as it affected his work plan and his resources. The project manager hadn't meant to leave out the team lead, the new approach was a good one, and so what was the harm?

A few days later, the technical team lead was talking to one of his team members and discovered she was working on a different assignment. The project manager had approved the reassignment. The team lead met with the project manager, who explained that she had just bumped into the other project manager in the elevator. This had not been a formal meeting. The other project manager happened to have been short-handed, so she had agreed that the team member could help out. Again, the team lead protested that he had been left out of the decision and not been informed.

The project manager didn't think this was a problem. After all, the team lead had not been left out deliberately, it was just informal, and the decision was a good one, so why the concern? This pattern of events continued. It didn't take long for team members to bypass the team lead and start going straight to the project manager to resolve any requests or issues.

The team lead became extremely frustrated. Repeated meetings with the project manager did not correct the situation. So instead, the team lead just tried to keep up to date on what was going on with his team and understand the progress they were making. The technical lead disliked working this way, but his repeated discussions with the project manager had not corrected the problem.

## Epilogue

The cube and report team started to have significant problems. The users had rejected the prototype cubes and reports. Significant re-design and re-work was required. Internal wrangling developed based on users and developers blaming each other for inadequate requirements definition. In addition, the cube and report team had a lot of difficulty in doing the re-work. This team now required a lot of time from the project manager.

As a result of the upheaval in the other team, the project manager was too busy to address informal questions about the technical team's work. The technical team lead kept the project manager informed about progress through the weekly status reports and meetings, but received no follow up questions.

The technical lead resumed control of his resources and plan, and the work proceeded according to plan.

As the cube and report problems were resolved and the project neared completion, the project manager congratulated the technical lead on a job well done. The technical lead pointed out that he had delivered the work with the appropriate quality on time, even though the project manager had been unavailable to interfere. The two laughed about the situation together.

On their next project together, the team lead met with the project manager at the beginning of the project. Since he had proven himself capable of leading his own team, they agreed that that


project manager would try very hard to avoid interfering. They met weekly to discuss progress, issues and explore alternative approaches.

Sometimes, the project manager slipped back into her old ways, but the team lead would remind her to stay out of the way – they could laugh together about it, and the project manager would back off.

### Conclusions

There were a couple of interesting possible reasons for the project manager's behavior. First, she was new to the organization and felt a need to prove herself in the new environment. As a result, she was spending extra time getting involved in details to reassure herself that the project was going to succeed.

In addition, the project manager was a very easygoing, approachable person, so team members and other project managers felt comfortable chatting about their project issues and getting her involved. The project manager was usurping the authority of her own team lead. By doing so, she was working very long hours doing more work than she really needed to. She could have been focusing the whole time on output and issues, and instead got involved unnecessarily in the details of the technical team.

The project manager's approach caused a great deal of frustration for the technical lead. He had experience managing technical teams. He was capable of being responsible for managing the work of his team, but the project manager kept getting in the way. So, the team lead had the responsibility for getting the work done, but no real authority. 

*Debbie Gallagher is a Manager at Deloitte, Toronto. She can be reached at (416) 643-8767 or [dgallagher@deloitte.ca](mailto:dgallagher@deloitte.ca).*

[Debbie's previous "Project Management Tales" are available on her personal web site: [www.gallaghers.ca/debbie](http://www.gallaghers.ca/debbie).]

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# COMMUNICATING WITH SAM

## High Availability Advances: Network Friendly Architecture



Sam Johnston

### Question:

We have investigated high availability solutions for iSeries for several years however we have never been able to justify the high initial cost for iSeries hardware and HA software as well as the ongoing operating expense associated with the network these solutions require. How do we minimize initial investment and minimize the number of lost transactions without severely impacting our network and system performance? What recommendations do you have?

### Answer:

There have been several significant developments recently that can address each of your concerns. In February this year IBM announced special high availability pricing for model 810s allowing smaller sized companies to more easily justify the initial expense of the iSeries hardware.

IBM has also recently expanded the number of qualifying HA Business Partners to include more cost effective solutions. These new HA solution providers have built their application around the latest remote journaling technology in OS/400. The combination of new applications and remote journaling options can have a significant impact on reducing HA costs along with reduced workload on the source machine and the latency between source and target machines. This can significantly improve the ROI for High Availability compared to the legacy HA solutions built on harvesting local journals that have been around for many years.

The remote journaling function of OS/400 offers a reliable and efficient method to transfer journal entries from a source to a target machine. Since this is a built in function of the base OS/400 code and not a separate product or feature it is implemented in the licensed internal code layer. The main benefits of this are that it eliminates the need to create copies and store harvested journal information on the source machine. It also reduces the CPU workload on the source by eliminating the processing required to harvest the journal and puts it where it belongs on the target machine. This approach can lower CPU and DASD workload on the source machine often more than 10%. This means you probably won't have to upgrade your source production system to accommodate HA workload.

In order to have a workable HA solution for today's iSeries you must consider replicating more than OS/400 database and access path information. In V5R1

remote journaling was enhanced to broaden the types of objects that can be journaled to include data queues, data areas and IFS files. As the list of object increases so does the amount of journal traffic so you want to ensure the underlying communications method is as efficient as possible. Legacy HA solution providers that harvest local journals on the source machine had to build their own proprietary transfer function into their product before remote journaling became available. This adds to the cost of legacy HA solutions, and results in lower overall performance capability. The next two figures show the difference remote journaling can make to the source machine workload.

### Legacy Approach (Figure 1)

Notice how many times the information must cross the machine interface to the HA software on the source machine in **Figure 1** and compare that to **Figure 2**. ▶

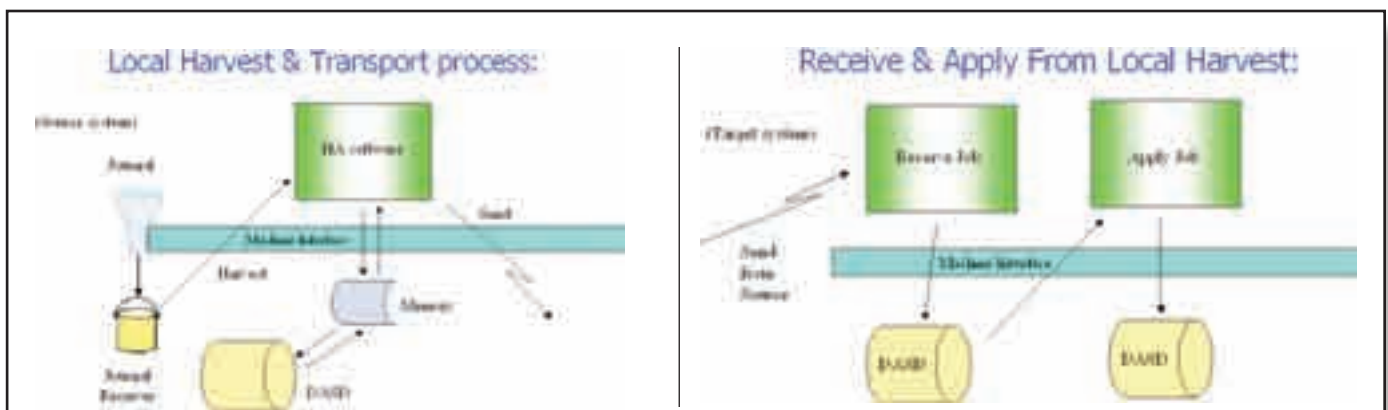


Figure 1

## Figure 2: Remote Journal Based Solution

Once we have accepted the superiority of remote journaling based HA applications we need to decide how we want to maintain the journals. There are two options here for consideration. Like everything else in life they are trade-offs so you need to determine which meets the need of your business.

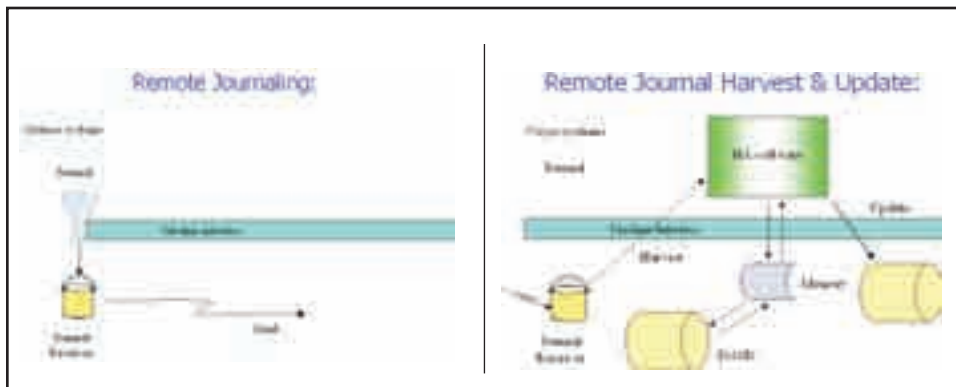


Figure 2

The first option is **Synchronous Delivery Mode**. This method guarantees the journal entries are in the main storage of the target system before the control is returned to the application on the source system. This is really the only way to guarantee the recovery point is the last transaction. This may be critical to some organizations. However this may also have a negative effect on application performance from an end user point of view if your systems are widely geographically spread out and communications are over a WAN (wide area network). The end users must wait for the synchronous acknowledgement response from the target system before completing the transaction.

The second option is to use **Asynchronous Delivery Mode**. Sending entries this way means that they are sent to the target machine sometime after the control is released back to the end user application. This method would not guarantee the recovery point is the last journal entry however the other positive business benefits are likely to mitigate the cost of a small number of lost transactions in the event of a failure. In testing asynchronous delivery IBM

found it to be extremely fast and efficient. “In every instance we never saw more than 5ms transpire between the time we produced the journal entry on the source system and the time it was sent down the communication wire” – IBM Striving for Optimal Journal Performance. Provided that your communication infrastructure is sized to handle the traffic volume asynchronous delivery is quite capable of providing a reasonable recovery point

for most business needs. If your plan is to keep the transport overhead to a minimum then asynchronous is the way to go.

The potential for a communication bottleneck exists in any situation where information must be exchanged between two systems regardless of which solution you choose. The performance of the end user application can also be significantly affected, or the latency between the systems can increase beyond desired levels, if the network infrastructure and the available bandwidth are not sufficient. The good news is that the cost of high-speed services has reduced significantly over the past few years, so the communication infrastructure needed to link the source and target machine now represents a smaller portion of the overall HA investment. While communication costs have generally decreased low latency network solutions are still expensive and having adequate bandwidth is still critical to the success of the HA solution. That being said, the new generation HA solutions are more flexible in that they can be supported with lower bandwidth, with the cost being the increased risk of losing a transaction in the event of system failure during the

delivery lag. This means that the new solutions offer greater granularity in the additional operating expenses needed to support the solution to allow customers to more easily calculate the breakeven point between the cost of increasing bandwidth and the cost of recreating a lost transaction.

Now that we have discussed a few ways the new HA solutions and offerings from IBM can lower the cost of HA we should take a look at the causes and increasing cost of downtime. Most downtime is scheduled and planned, and only a small percentage is unplanned in disaster situations. The planned causes include daily backups, reorganization of files to reclaim disk space, application software updates, IBM OS releases and PTFs, hardware upgrades.

Many business pressures are demanding continuous operations from our mission critical system. Globalization and centralization, the economic pressures of demanding more from less, and WEB based services means that the window for these scheduled activities is shrinking to zero. The cost of downtime is also increasing. The number of employees that are idle during an outage due to their dependence on production systems is increasing, and the work they do is increasing in importance. Their wages alone can be a significant cost. The potential lost customer business is also a factor that adds to the cost of an outage. New HA solutions (by decreasing the operating expenses needed to support the solution, and improving the business case) make it easier to deliver continuous availability and to accommodate the need to complete system maintenance tasks.



**Sam Johnston** is a partner and Chief Technology Officer of Intesys Network Communications Ltd., providing value-added networking and e-commerce solutions to the iSeries community. He can be reached at (416) 438-0002 or via e-mail at [sjohnston@intesys-ncl.com](mailto:sjohnston@intesys-ncl.com). Any TUG member wishing to submit a question to Sam can forward their typewritten material to the TUG office, or to Intesys. The deadline for our next issue is Friday June 11, 2004.



# Solutions Beyond Limits eServer has IT all!

By Glenn Gundermann, Chair – TEC2004



Léo Lefebvre with  
Glenn Gundermann

## TEC 2004 Wrap Up

**W**hew, what a year! You might be wondering what I mean, considering this is only May, but we took a full year to prepare for our 11th annual TUG Technical Education Conference (TEC), which was just held on April 20-21, 2004.

For the fifth consecutive year, I had the honour again to be Chairman of the TUG TEC Committee and what a conference it was! In case you've heard enough from me throughout the year, I have included correspondence from several people below.

It was the usual format, being two days in length with six classrooms. What marked this year's event different from



Keynote speaker: Robert Tipton

previous years was the addition of two big items: an Executive Breakfast on Day 1 and two hands-on labs at the IBM Toronto Lab on Day 2.

Both labs were well attended. The morning lab was on "Remote System Explorer" and the afternoon lab was on "Web-Facing." TEC provided a free shuttle service between the hotel and the labs, so that those who attended both could still return for the keynote luncheon.

What topped this year's event was having one of the very best keynote speakers, **Robert Tipton**, author of the book *Untangling IT*.

[www.untanglingIT.com](http://www.untanglingIT.com)

**Eveline Gaede**, one of our own TUG TEC Committee members, attended the Executive Breakfast and had this to say; "Executives were invited to attend a hot-buffet breakfast and listen to Robert Tipton talk about 'Untangling IT.' The breakfast was well attended and all enjoyed Bob's comments and views on a variety of IT leadership topics. He covered topics as far-reaching as 'Analyzing the Industry', 'Leadership 101', and 'How to Position the IT Department to Become an Integral Part of the Company', to name just a few.

Afterwards, the executives were invited to visit our Vendor Showcase. An open invitation was issued to attend any of the regular sessions so they could fully appreciate where (and why) their education dollars were being spent."



Attendees at the executive breakfast sessions

Robert Tipton not only spoke at the Executive Breakfast but was also our featured Keynote Speaker as well as speaking for two sessions. One of our attendees, **Alena Sabo**, attended his session "Breaking Out Of Your Comfort Zone" and had this to say, "The TEC conferences always give me that leading edge understanding that is necessary in today's environment. It is part of professional development, which is high on my priority list.



Remote sessions at the IBM Canada Lab

Photos by Léo Lefebvre



*Joelle Cilley with Richard Dolewski*



*Bob Ash with Dan Le Huquet*

**The 5th Wave** By Rich Tennant



"I saw the flames when they started too. I just thought it was part of the exhibit."

This elective session was different from the usual technical-filled experiences of TEC, nevertheless, a very worthwhile selection. Robert's good spirit touched everyone in the room that day. He is a teacher of ethics, understanding and motivation. This session made a difference for me and has the potential to benefit us all."

Robert wrote to let us know he made it home safely. "Greetings from snowy Denver! Go Avs, Go Leafs Go! ... It was my pleasure (very much so!) to be invited back to Toronto ..."

The IBM Liaison to TUG has been **Dale Perkins** for a couple of years and he helped us again with TUG TEC. Just recently **Stephen Quan** has come on board. Both were on hand at the conference and were a big help to the committee. Stephen wrote, "I got a real kick out of my first TEC conference as an IBM Liaison. It truly impressed me how smoothly TUG runs this event. My last time here was in 2000 as an attendee and it seems that this event, thanks to the

hard work of the TUG volunteers and TEC committee, always runs seamlessly. It's even more impressive to see first hand. The professionalism and cheerful attitude of the TEC committee are something many user groups would do well to emulate.

I found the WebSphere sessions by **Alison Butterill** et al were very informative and well laid out. The sessions by Bob Tipton were particularly enjoyable to attend. His insights were very informative and a reminder that the IT industry is one in which nothing can be taken for granted. At dinner the first night, I had the privilege to sit beside him and found over the course of a long chat that the integrity and character he exudes in his sessions is no exaggeration."



*Jim Schmiedendorf and Eden Watt with David Lefkowich at the Vendor Showcase*

I am very proud of the TUG TEC Committee. We all worked as a team and worked hard. A lot of hours went into this to make it such a success. During the meetings throughout the year and even during the conference itself, we can be pretty hard on ourselves or others, any time something doesn't go just right. Even the littlest of things can seem like a big deal for a split second. Now that the event is behind us, we all know what a great job the team did. **Wende Boddy**, TUG's association manager and TUG TEC committee member, couldn't have



*Eveline Gaede teaching corks*



*Graham Cromar ... lovin' IT*



said it better; "Give yourselves a pat on the back, you're a great bunch and I feel very lucky to be working/playing with you all."

Here is the list of TEC committee members: **Alkarim Sachedina** was in charge of Audio Visual and our Mtrack database. **Bob Lesiew** and **Eveline Gaede** were in charge of registration. **Ed Jowett** was in charge of security and facilities. **Glenn Gundermann** worked on arranging CD duplication, our committee shirts, printing of the flyers and session handouts, plus chairing the meetings. **Ken Sadler** worked on sponsorships. **Léo Lefebvre** was in charge of speakers, session topics, CD content and our Web site. **Neil Andrus** was in charge of marketing. **Richard Dolewski** was in charge of the Vendor Showcase. **Stephen Bingham** helped on everything. **Vaughn Dragland** was in charge of the budget and magazine content, and was our COMMON liaison. **Wende Boddy**, our Association Manager, was in charge of telemarketing, worked with IBM mailing, and assisted with marketing.

**Jerry Dmytrasz** was not on the committee, but volunteered to help out with registration. Also, from IBM we had **Dale Perkins** and **Stephen Quan**, who helped with IBM mailings, laptop and printing equipment, speakers, plus much more.

The Vendor Showcase was great this year. We had 33 vendors composed of our faithful regular sponsors plus quite a few new ones! (See sidebar for the list.) It was exciting to see all of the latest information on iSeries related products and services laid out for us, plus the hors d'oeuvres and the fabulous vendor-donated door prizes. A big thank you to all of the vendors for putting on such a super Showcase! A special thanks




**TEC 2004 committee members**



**Speakers: Daniel Magid and Robert Tipton**

also to our coffee break sponsors: **Coca Cola Bottling Ltd.**, **Challenger Motor Freight** and **sofCast Inc.**, as well as the executive breakfast sponsor: **CGI**.

I hope I have this honour again next year. So until then, happy computing! 

**Glenn Gundermann** is an independent iSeries consultant and Chairman of TUG's Technical Education Conference committee. He can be reached at [ggundermann@tug.ca](mailto:ggundermann@tug.ca) or (647) 272-3295.

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# JACKIE'S Forum

## Automated Data Movement - FTP

There are many excellent software solutions in the marketplace that assist in data movement from one system to another. Surprisingly, to some people, the most common technique to transfer data across all platforms remains FTP.



**Jackie Jansen**

Worked with a customer recently who wanted to automate retrieving and then reformatting data from a PC to input into their iSeries data warehouse. In previous articles we have discussed using the CPYFRMIMPF (Copy From Import File) command to transform data from PC ASCII files to DB2/400 tables. Today we will look at automating the actual transfer of data from the PC using FTP. This will be controlled from the iSeries.

In batch mode the FTP command implicitly looks for a file called INPUT and a file called OUTPUT. INPUT contains the FTP script that you want to run and OUTPUT contains the output log of the FTP session.

INPUT will normally contain a login userid and password for FTP to use. It will also have the FTP PUT or GET commands that you wish to execute. It will close off with a simple QUIT.

A very basic INPUT file might look like **Figure 1**:

```
userid password
GET BOOKS.CSV QGPL/BOOKSCSV (REPLACE
QUIT
```

**Figure 1**

This directs FTP to log on the specified userid and then retrieve the file called BOOKS.CSV in the current PC directory. This file will be stored in a temporary table defined as having one column on the iSeries. The CL program to control this data movement and transformation would look like **Figure 2**:

```
/* This program will override the FTP INPUT file to point to the source member containing the FTP script. FTPLLOG will contain the log of this FTP session. */
+
+
/* After completion of the FTP command the new file BOOKSCSV, still in PC format ,will be converted to DB2/400 via the CPYFRMIMPF command. */
+
+
PGM
OVRDBF FILE(INPUT) TOFILE(QGPL/QFTPSRC) MBR(FTPGET)
OVRDBF FILE(OUTPUT) TOFILE(QGPL/QFTPSRC) MBR(FTPLLOG)
FTP RMTSYS('9.1.12.123')
CPYFRMIMPF FROMFILE(QGPL/BOOKSCSV) +
TOFILE(QGPL/BOOKSTABLE) +
MBROPT(*REPLACE) RCDDL(*CRLF)
ENDPGM
```

**Figure 2**

The log file looks like **Figure 3**:

```
Output redirected to a file.
Input read from specified override file.
Connecting to remote host 9.1.12.123 using port.
220 Please enter your user name.
Enter login ID (username):
331 User name okay, Need password.
230 User logged in.
Enter an FTP subcommand.
> GET BOOKS.CSV QGPL/BOOKSCSV (REPLACE
125 Entering Passive Mode (9,1,12,123,15,194)
125 Using existing ASCII mode data connection for BOOKS.CSV (59018 byte
226 Transfer complete. 59018 bytes in 0.26 sec. (217.490 Kb/s)
59018 bytes transferred in 0.267 seconds. Transfer rate 221.372 KB/sec
Enter an FTP subcommand.
> QUIT
21 Goodbye. Control connection closed.
```

**Figure 3**

This is a simple approach to automating the movement of a limited number of tables to or from the iSeries. There are many excellent data movement and transformation tools available.

As the number of tables you need to transfer grows, the requirement for data extraction, transformation, and movement solutions increases. I would encourage you to investigate a few of them and select the ones that best suit your needs.



**Jackie Jansen is a Senior Consulting IT Specialist. She currently works in the IBM Americas Advanced Technical Support Solutions Centre. Jackie is a frequent speaker at iSeries Technical Conferences and Users Group meetings. Contact her at [jjansen@ca.ibm.com](mailto:jjansen@ca.ibm.com).**

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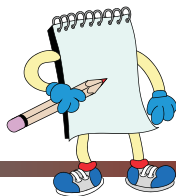
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# TUG NOTES



## ✓ TUG's Calendar of Upcoming Events

- ☒ **May 19, 2004 – MoM (at Woodbine Racetrack)**
  - ▶ **5:00** Session 1  
PIPED act  
Speaker: Dave Smith
  - ▶ **7:00** Session 2  
IBM iSeries Announcements  
Speaker: Dale Perkins
- ☒ **June 18, 2004 – TUG Golf Classic**  
(16th Annual) Nobleton Lakes Golf and Country Club in Bolton
- ☒ **September 22, 2004 – MoM**
- ☒ **Oct. 17-21, 2004 – COMMON**  
Toronto, Ontario
- ☒ **November 17, 2004 – MoM**

## ✓ Why Do We Bother You?

### The View From the Other Side – a Telemarketer's Look at Things.

I do take some consolation in knowing that you are at work and I can assume that you do not have a toddler in the bath and chops in the oven and your mother-in-law on the other line when I interrupt you. However, it is still an interruption.

Is it worth it? I certainly hope so. The telemarketing is just a small part of the work that goes into the making of the Technical Education Conference every year. Small groups of dedicated volunteers devote a great deal of time and effort to make this event a success for YOU. For the past 11 years, the conference has delivered excellent education opportunity to anyone involved in the midrange computer field. By the end of April, the planning for TEC 2005 will have already begun.

I hope everyone involved; the speakers, the TUG volunteers and especially the attendees enjoy this year's conference. We look forward to seeing you next year. Goodbye. As I say on the phone, "Have a pleasant day."  
– E.P.

## ✓ TUG Board Election Fiscal Year 2004/05

There were only five candidates this year, so all were elected by acclamation. These included incumbents **Glenn Gundermann, Ken Sadler, Léo Lefebvre,** and **Richard Dolewski,** along with newcomer **Jay Burford.** Directors **Beverly Russell** and **Neil Andrus** are retiring from the TUG board at the end of their terms (June 30).

## ✓ Door Prize Winners

Here are the prize winners at the March 24<sup>th</sup> TUG Meeting of Members: **Matthias Schmidt, Leonard Eng, and Shahid Jamil.** Thanks to Coca Cola Enterprises, Challenger Motor Freight, and GSS Marketing for the great door prizes! And also, a special thanks to GSS Marketing for sponsoring the mouthwatering desserts. – **W. Boddy**



*Dale Perkins and Stephen Quan*

## ✓ New TUG IBM Liaison

After many years of faithful service to TUG as our IBM Liaison, **Dale Perkins** has decided to step aside to make way for a fresh face. Our new IBM Liaison will be **Stephen Quan,** who can be contacted at (905) 316-8310 or [squan@ca.ibm.com](mailto:squan@ca.ibm.com).

"Dale, it has been great working with you! You have always come through with the things we needed from IBM, and did a great job with articles for the magazine and presentations at meetings. We all wish you the best of luck with your new assignments at IBM!"  
– Editor



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