

April 23-27, 2006 • Denver, Colorado

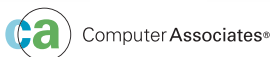
The DAMA International Symposium & WILSHIRE Meta-Data Conference



Where the Data World Meets



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Welcome to the 10th Anniversary of the Combined DAMA International Symposium and Wilshire Meta-Data Conference — *Bigger and Better than Ever!*

Even after 10 years of these two conferences being together, we have some special features and surprises for you at this year's conference program, including:

- **New Zachman Framework Track** (see pages 20-21)
- **More Advanced Conference presentations :**
Look for the "Double" Sessions and topics labeled as "Advanced" and "Business."
- **Academic/Research Track:**
including original research on metadata, data modeling and data quality topics.
- **Metadata Interoperability Demonstrations:**
See your own models and metadata translated into different tools!



NEW & EXCLUSIVE: See Your Own Metadata in the Latest Tools at the Conference!

Don't come empty-handed to the exhibits! For the first time, we will partner with Meta Integration to provide a unique and powerful demonstration capability at the conference. Bring your own data or object models from popular design tools, your data integration models from popular ETL tools, and your dimensional and reporting models from business intelligence tools, and you can see them converted between the technology and tool of your choice. Exhibiting vendors across the show floor will be set up to show you how your metadata converts to their tool—while you watch! Meta Integration will also demonstrate metadata stitching for detailed lineage and impact analysis graphical tools for today's complex multi-vendor environments, therefore providing the "technical truth" on the origin of data behind all reports (as required for the Sarbanes-Oxley Act compliance).

Meta Integration® Technology, Inc. (MITI) is the leading metadata component provider to major database, data integration, business intelligence, repository, and modeling tool vendors. MITI has established itself as the "Switzerland of Metadata" as Lou Agosta, a Giga Information Group analyst expressed in a recent *IdeaByte* article.

How Can You Participate? Bring your files to the conference (on CD or jump drive), or send your models/questions in advance to info@metaintegration.net.

40 First Hand Practitioner Stories

We always place a strong emphasis on bringing you stories directly from your peers, and this year is no exception, with more than 40 sessions conducted by corporate data management professionals:

Air Products
Allstate Insurance Company
Andersen Corporation
APL, Limited
BellSouth
Biomedical Informatics NCI Center for Bioinformatics, NIH
BMO Financial Group
California Department of Education
Caremark
Circuit City Stores, Inc.
Elkay Manufacturing Company
Federal Aviation Administration
Ford Motor Company
GE-Consumer Finance
Genentech, Inc.
Giant Eagle, Inc.
Hallmark Cards, Inc.
Intel Corporation
John Deere Credit
Johnson & Johnson
Laidlaw Education Services
MasterCard International
MFS Investment Management
Merck & Co.
National Institute of Health
Nationwide Insurance
Natural Resources Information Management
NDCHealth
Paccar, Inc.
PeaceHealth
Port Townsend Paper Corporation
Shell Canada Limited
CalPERS, State of California
State of NJ - OIT
The Department of the Interior
The MITRE Corporation
TIAA-CREF
University Health System Consortium
US DOI Bureau of Land Management
Wells Fargo Consumer Credit Group

Tuesday, April 25, 2006, 8:30 am



Doug Lenat
President
Cycorp, Inc.

“The Future is Not What it Used to Be”

There are lots of famous statements about the future and, so far at least, this one attributed to Admiral Bill Rowley hasn't been wrong. Yet, despite the difficulties and risks of prediction, we all end up making bets on the future, especially when it comes to our professional careers. We make assumptions about the way things will be in the future—things that will change or not change, opportunities that will open or close for us.

Doug Lenat is a world renowned computer scientist who has made some big bets on the future himself, especially in terms of technology. In this opening session he's going to make a few more predictions about our technology future, and especially as it affects the realm of data management. Beyond mere technical forecasting however, he'll also give us some unique insights into the folly of trying to predict the future, and try to offer some explanation as to why we, as humans, so often get it wrong.

- Pitfalls in making predictions
- Why don't people make rational judgements? Why do they make choices against their best interests?
- Is knowledge really the key resource of the future? And if it is, can we manage knowledge?
- What's with the profusion of “semantic technologies?” Will they (can they) deliver on the promises?
- Is there a new form of metadata on the horizon?
- What is human knowledge? Can it be understood by computers?

■ **Doug Lenat** is one of the world's leading computer scientists. He is the founder of the CYC® project, a research endeavor founded more than 20 years ago to build a huge knowledge base of human knowledge, experience and common sense. He has been a Professor of Computer Science at Carnegie-Mellon University and Stanford University. He is a prolific author, including hundreds of research and academic papers and four books.

Wednesday, April 26, 2:30 pm



David Weinberger,
Consultant and Author
The Cluetrain Manifesto;
Small Pieces Loosely Joined

Everything is Miscellaneous (or, the social significance of metadata)

For 2,500 years, knowledge was shaped like a tree. It had a root, branches, and leaves. Now that we're digitizing all the information we can lay our mitts on, it's becoming clear that trees make sense within the constraints of the real world but are far too limited when it comes to organizing information in the digital world: trees assume a leaf really should be on only one branch, favor neatness over mess, are owned by the people who own the knowledge, and assume the universe can be known ahead of time. We are instead rapidly inventing new principles of organization, from faceted classification to bottom-up taxonomies and folksonomies. If we change the most basic principles of organization, what will happen to knowledge and to the institutions that take their shape from knowledge? What effect will that have on us and on our way of understanding ourselves and the world we share?

■ **Dr. David Weinberger** is one of the most respected thought-leaders at the intersection of technology, business and society. He is a co-author of the bestselling book, *The Cluetrain Manifesto* (Perseus Books)—which *Information Week* called “the most important business book since Tom Peters' *In Search of Excellence*—and *Small Pieces Loosely Joined*. His work has appeared in *Harvard Business Review*, *The New York Times*, *Wired*, *Salon*, *The Guardian* and many others. He is a commentator on National Public Radio's *All Things Considered* and *Here and Now* and was, for a few years, a joke-writer for Woody Allen.

Thursday, April 27, 11:10 am



Marcie Barkin Goodwin
CEO
Axis Software Designs

What Do Data Management and Hollywood Have in Common? More Than You Think!

What are the necessary ingredients for a successful career in Hollywood? Sure, there are lots of clichéd answers to that question, but mostly it comes down to the same ingredients that matter in every other walk of life—conducting yourself professionally, being trained and prepared, working well with colleagues and showing up on time. In other words, communication, collaboration, humor, common sense, respect for others, etc. They're all basic skills critical for a successful career, relationship, and life (though perhaps the nature of Hollywood amplifies and puts them in a more glamorous context). Our very own Marcie Barkin Goodwin—former actress and comedienne—shares some of the life lessons she has learned in both communities—Tinseltown and Data Management.

- Communication and persuasion
- Bouncing back—dealing with rejection & disappointment
- Dealing with awkward situations and conflicts
- Using humor—when and how
- Presentation and interview skills
- Dealing with executives and famous people
- Taking chances

■ **Marcie Barkin Goodwin** is a former film and television actress who made the transition to the consulting and software world 15 years ago. Her firm, Axis Software Designs, is a model management services and education company specializing in modeling environments, their infrastructures, and the fostering of communication to ensure successful projects. Her quick wit, engaging personality, and vast “hands-on” experience make her a charismatic and highly entertaining, informative speaker.

What Does the “Level” of the Session Mean?

You’ll notice that a “Level” (such as Advanced, or Business) is indicated on many of the sessions. This is in response to the many requests we’ve received in the past to indicate the educational and technical level of each presentation, so that you can better determine which session are right for you. Briefly, the ratings work like this:

- **Introductory.** These sessions assume little or no prior knowledge of the subject matter in order for the audience to benefit from the presentation.
- **Intermediate.** This is the “Default” rating. The vast majority of the presentations have been prepared for professional data management practitioners with at least 3–5 years experience in the field, so by far the largest percentage of presentations fall into the Intermediate category. Because it is the default rating, we therefore have not included it above the description.
- **Advanced.** Sessions may be defined as advanced for a variety of reasons, including that they require a deep technical knowledge, or a sophisticated understanding of a complex subject.
- **Business.** Obviously most of the sessions at the conference have some sort of business impact, however the “Business” level is used to describe sessions which are suitable for business staff (rather than IT).

CALL FOR SUBMISSIONS:

Announcing the 5th Annual Wilshire Award for Metadata “Best Practices”



Wilshire Conferences is pleased to announce that submissions are now being received for the fourth annual “Wilshire Award” recognizing best practices in Metadata management. The award is given to a corporate data organization to recognize business value, innovation, and excellence in design and/or implementation of metadata as a critical component in data management success.

- All entries MUST comply with the requirements set forth in the “Call for Submissions” (CFS), available at: www.wilshireconferences.com/award.
- Submissions are due by March 31, 2006. Eligibility and judging criteria are outlined in the CFS.

The winner will be announced at the conference.

Conference Audio Recordings

Hear the sessions you can’t attend for just \$95! With 8–10 sessions at one time, there are bound to be many timeslots where there’s more than one presentation you would like to attend. Now we have an answer for you! Almost all the presentations at the conference will be audio recorded so that you can listen to them after the conference. They will be provided for download in MP3 format within a few days after the conference so that you can listen to them whenever you wish, for a full year after the conference.

The special pre-conference pricing for this wonderful opportunity is just \$95 for individual conference attendees. Additional users may be added for an additional \$95 each, or a site license purchased for \$950. For anyone who is not attending the conference, the fee is \$1695 (the regular price of attending the conference) for the first user, and again, \$95 per additional user and \$950 for the site license. Any questions about the audio recordings may be directed to info@wilshireconferences.com

Data Management Resources Online

Both the DAMA International (www.dama.org) and Wilshire Conferences (www.wilshireconferences.com) web sites contain a treasure trove of valuable resources for you, including articles, white papers, interviews with prominent experts, and links to recommended books and other educational references.

Join in the DM-DISCUSSION!

DM-DISCUSS is a moderated discussion list for anyone interested in Data Management issues. Over 1000 members of the Data Management community subscribe to DM-DISCUSS for timely conversations on a wide variety of topics. You can join in too, by going to www.wilshireconferences.com (it’s a link at the bottom of the page) or by sending an email to: dm-discuss-subscribe@yahoogroups.com

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Founded in 1986, ASG is a privately held enterprise software and professional services firm that provides a full range of software solutions in the Metadata Management, Security Management, Applications Management, Operations Management, Content Management, Performance Management, and Infrastructure Management arenas. ASG serves 7,000 customer sites and the majority of Global 5000 companies with 18,000 software licenses worldwide. ASG is headquartered in Naples, Florida, USA, with more than 45 offices throughout the Americas, Europe, Middle East, Africa, and Asia/Pacific.



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Computer Associates International, Inc. (CA) is a leading worldwide provider of solutions and services for the management of IT infrastructure, business information and application development. CA's solutions address a uniquely extensive range of management challenges to optimize the performance, reliability and efficiency of enterprise IT environments. These solutions include infrastructure management, storage management, security management, business service optimization, mainframe solutions, data and application development, and common services to optimize and understand your IT environment.



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Informatica Corporation (NASDAQ: INFA) is a leading provider of data integration software. Using Informatica products, companies can access, integrate, visualize, and audit their enterprise information assets to help improve business performance, increase customer profitability, streamline supply chain operations and proactively manage regulatory compliance. More than 2,100 companies worldwide rely on Informatica for their end-to-end enterprise data integration needs.

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Data Advantage Group, Inc. Data Advantage Group is the leading provider of information asset management software. Data Advantage Group's award-winning MetaCenter® Platform enables organizations to easily research, locate, and manage enterprise information assets and to bridge the gap between business and IT communities with a unified real-time view of business and technical assets and their interrelationships. Data Advantage Group's clients include: Allmerica Financial, Blue Cross Blue Shield of Michigan, Cable & Wireless, Diageo, Fidelity Investments, T-Mobile and VW Credit.



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EWSolutions, headquartered in Chicago, is a full-service strategic consulting partner and systems integrator providing corporations and government agencies with best-in-class, knowledge-based solutions using business intelligence, data warehousing, and managed metadata environment technologies. EWSolutions delivers a total solution for designing, building, maintaining, or improving a enterprise architecture, business intelligence, data warehouse and metadata repository investment to attain a competitive business advantage and achieve total value.

EXHIBIT HOURS:

Tuesday April 25 4:15 pm - 8:00 pm
Wednesday April 26 3:45 pm - 6:00 pm

Exhibit and Sponsorship Opportunities

If you are interested in promoting your company at this conference, please call Rick Froton, Director of Sales at 603-305-0660 or e-mail him at rick@wilshireconferences.com

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Agenda at a Glance

Sunday, April 23

1:00 pm - 9:00 pm	REGISTRATION (registration remains open until 9:00 pm)				
3:30 pm - 6:45 pm	WORKSHOPS				
Coffee Break: 5:00 pm - 5:15 pm	W1: Working with Corporate Politics to Help Data Management Succeed Danette McGilvray, Granite Falls Consulting, Inc.	W2: Business Rules: What You Need to Know from A to Z Ronald G. Ross, Business Rule Solutions, LLC	W3: "Actionable Solutions" for Data Governance, Stewardship & Metadata: Workshop Robert Seiner, KIK Consulting & Educational Services/TDAN.com	W4: Universal Patterns in Data Modeling Len Silverston; Paul Agnew, Universal Data Models, LLC	W5: How to Win Friends and Influence People with Painless Data Model Reviews Karen Lopez, InfoAdvisors/ITBoards.com
7:00 pm - 8:00 pm	NIGHT SCHOOL				
	How Data Management Supports the CIO Dan Weller, APL, Limited; Nicholas Khabbaz, e-Modelers, Inc.	Oh No! Not Another @%&? Compliance Requirement! Alan Perkins, ASG Integrated Metadata Management Solutions	Conceptual Data Modeling: Resisting the Urge to Go Physical Pete Stiglich, EWSolutions		

Monday, April 24

7:30 am - 8:30 am	REGISTRATION & CONTINENTAL BREAKFAST				
8:30 am - 4:45 pm	TUTORIALS				
Coffee Breaks: 10:00 am - 10:30 am 2:45 pm - 3:15 pm Lunch: 12:00 - 1:15 pm	T1: Enterprise Architecture Principals and Values—Straight from the Source! John Zachman, Zachman International	T2: Logical Data Modeling William Smith, William G. Smith & Associates	T3: Danger, Danger! Bad Data Ahead Claudia Imhoff, Intelligent Solutions, Inc.	T4: Developing a Sustainable Enterprise Data Strategy John Ladley, Navigant	T5: BPM 101: An Introduction to Business Process Management and BPM Systems Brett Champlin, Association of BPM Professionals
5:00 pm - 6:00 pm	NIGHT SCHOOL				
	Build or Buy a Metadata Repository? Malcolm Chisholm, Askget.com Inc.	Applying the TOGAF Methodology to Enterprise Architecture Thiru Thangarathinam, Intel Corporation	Collaborative Functional Requirements Development for Large Fixed Bid Applications Ravi Sankar; Rambabu Yeleli, Satyam Computer Services	DAMA's CDMP: A Way of Differentiating Yourself Professionally Patricia Cupoli, DAMA International	Enterprise Wide Data Integration and Master Data Management David James, IBM
6:15 pm - 7:15 pm	GENERAL MEETING OF DAMA MEMBERS AND INTERESTED PARTIES				

Tuesday, April 25

7:00 am - 8:30 am	REGISTRATION & CONTINENTAL BREAKFAST				
7:30 am - 8:30 am	SIGs: Special Interest Groups and User Meetings				
	PowerDesigner SIG Michael Nicewarner, John Deere Credit		AllFusion ERwin Special Interest Group—Tips, Tricks & Suggestions Marcie Barkin Goodwin, Axis Software Designs		
8:30 am - 9:00 am	WELCOME – DAMA & Wilshire				
9:00 am - 10:00 am	OPENING KEYNOTE: The Future is Not What it Used to Be Doug Lenat, Cycorp				
10:00 am - 10:30 am	COFFEE BREAK				
10:30 am - 11:30 am	Phoenix Rising: It Was a Dark and Stormy Night... Amy Pfaff, TIAA-CREF; Charlie Bach, TIAA-CREF	Managing Business Complexity Archie Abaire, Circuit City Stores, Inc.	Data Modeling Contentious Issues Karen Lopez, InfoAdvisors/ITBoards.com	Harmonizing the ISO 11179-3 and CWM Metadata Standards Mark Riggle, Causal Aspects	Enforcing Data Quality Through Data Lineage Metadata David Plotkin, Wells Fargo Consumer Credit Group
11:30 am - 11:45 am	ROOM CHANGE				
11:45 am - 12:45 pm	The Evolution of Data Management at the FAA Diana Young, Federal Aviation Administration	Leveraging Legacy Data Corinna Martinez, CalPERS, State of California	Putting the I Back in IT Kjell Wittmaack, Platon A/S	Enterprise Information Integration: A Pragmatic Approach JP Morgenthal, Avorcor, Inc.	Bridging The Gap—Increasing Semantic Awareness In Today's Information Systems John Singer, MasterCard
12:45 pm - 2:00 pm	LUNCH				
2:00 pm - 3:00 pm	ERP Data Models for OUR Enterprise Corine Jansonius, Shell Canada Limited	Taking Data Quality Metrics to the Boardroom: A Case Study Lowell Fryman, Enterprise Integration Solutions LLC	Understanding Subtypes/Supertypes: The Data Modeler's Most Important Construct (Part 1) Gordon Everest, University of Minnesota	Strategic Planning for Master Data Management Jim McQuade, Giant Eagle, Inc.	Building Metadata with What You Have Around the Office Dawn Michels, Andersen Corp.
3:00 pm - 3:30 pm	COFFEE BREAK				
3:30 pm - 4:30 pm	Improving the Data Management Processes in Your Organization Using the Data Management (DM) Scorecard Pushpak Sarkar, Merck & Co.	Management is Not Enough: A Consolidated, Enterprise-Level Data Governance Framework Gwen Thomas, The Data Governance Institute	Understanding Subtypes/Supertypes: The Data Modeler's Most Important Construct (Part 2) Gordon Everest, University of Minnesota	Questing for the Grail: The Post-mortem of a Federated Metadata Management Project William Brooks, MFS Investment Management	Genentech Customer Master - An MDM/CDI Implementation Mehmet Orun, Genentech, Inc.; Stephen Thompson, Genentech, Inc.
4:30 pm - 8:00 pm	EXHIBITS OPEN: RECEPTION ON EXHIBIT FLOOR				
5:30 pm - 6:00 pm	In-Perspective Presentations – See conference web site for schedule: www.wilshireconferences.com				

Agenda at a Glance

Sunday, April 23

					1:00 pm - 9:00 pm
					3:30 pm - 6:45 pm
W6: Metadata Roadmap Joyce Norris-Montanari, Baseline Consulting	W7: The Intel Metadata Program: A Best Practices Case Study Jacque Gibson; David Ashton; Thiru Thangarathinam, Intel Corporation	W8: Discovering Value from Text Seth Grimes, Alta Plana Corporation	W9: Taxonomy Development and Implementation Seth Earley, Earley & Assoc., Inc	W10: Data Management 101 Peter Aiken, Data Blueprint and Virginia Commonwealth University	Coffee Break: 5:00 pm - 5:15 pm
					7:00 pm - 8:00 pm
Securing Sensitive Data Satya Sachdeva, Knightsbridge Solutions		The Rise and Fall of an Enterprise-wide Semantic Model: A Case Study John Schley, Nationwide Insurance		A Revolution in Data Governance and Metadata Management at NDCHealth Paul Dyksterhouse; Pamela Hulse, NDCHealth	

Monday, April 24

					7:30 am - 8:30 am
					8:30 am - 4:45 pm
T6: Effective Management of Master Data David Loshin, Knowledge Integrity, Inc.; Malcolm Chisolm, Askget.com, Inc.	T7: Managed Metadata Environment Full Life-Cycle Roadmap David Marco, EWSolutions	T8: The Business of Metadata R. Todd Stephens, BellSouth	T9: Crossing the Bridge from Unstructured Data to Structured Data and the Data Warehouse Environment William H. Inmon, Inmon Data Systems	T10: Consulting Skills for Data Professionals Graeme Simson, University of Melbourne	Coffee Breaks: 10:00 am - 10:30 am 2:45 pm - 3:15 pm Lunch: 12:00 - 1:15 pm
					5:00 pm - 6:00 pm
RFID Data Management Larry Dziedzic, Johnson & Johnson	How Enterprise Information Integration Can Add Value to an Enterprise Reporting Architecture Hans Yeager, SH Group	Leveraging Metadata to Automate the ETL Process Tom Harrocks, Knightsbridge Solutions			
					6:15 pm - 7:15 pm

Tuesday, April 25

					7:00 am - 8:30 am
					7:30 am - 8:30 am
Information Integration for Science Intelligence Richard Hackathorn, Bolder Technology, Inc.		De-mystifying the Relationship Between Web Services, Service Oriented Architecture and Data Laila Moretto, The MITRE Corporation			
					8:30 am - 9:00 am
					9:00 am - 10:00 am
ZACHMAN FRAMEWORK TRACK					10:00 am - 10:30 am
Using Metadata to Deploy Successful Enterprise Marketing Systems David Raab, Raab Assoc., Inc.	Safely Migrating Legacy Systems: A Legal-risk Averse Approach Peter Aiken, Data Blueprint/VCU; Tim Krantz, Esq; Luke Anderson, Esq., McGuire Woods	Metadata Integration (Part 1) Christian Breneau; John R. Friedrich II, Meta Integration Technology, Inc.	Standards Certification John Zachman		10:30 am - 11:30 am
					11:30 am - 11:45 am
Semantic Seeds: Maintainable Configuration Dataload using Ontologies Stu Baurmann, LogicU	Being a Good ERP Customer Bob Stanley, Data Blueprint	Metadata Integration (Part 2) Christian Breneau; John R. Friedrich II, Meta Integration Technology, Inc.	Speedy Complex Changes Stan Locke, Zachman Frameworks Associates		11:45 am - 12:45 pm
					12:45 pm - 2:00 pm
Using Metadata to Drive ETL Processing Richard Bartsch, Caremark	Manufacturing Supply Chain Analytics: Information Integration Techniques for Increased Business Effectiveness (Part 1) Andres Perez, IRM Consulting, Ltd. Co.	Semantics: What it Means for Data Professionals Dave McComb, Semantic Arts	Custom Standard Elaborations Gary Simons, SIL		2:00 pm - 3:00 pm
					3:00 pm - 3:30 pm
Managing Metadata at the Veterans Health Administration: A Case Study in Sharing a Metadata Registry Roger McCreery, Integrated Computer Strategies Corporation; Kathleen Gundry, SAIC	Manufacturing Supply Chain Analytics: Information Integration Techniques for Increased Business Effectiveness (Part 2) Andres Perez, IRM Consulting, Ltd. Co.	Semantics: The Semantic Web Dave McComb, Semantic Arts	Management Maelstrom John Zachman		3:30 pm - 4:30 pm
					4:30 pm - 8:00 pm
					5:30 pm - 6:00 pm

Agenda at a Glance

Wednesday, April 26

7:30 am - 8:30 am	REGISTRATION & CONTINENTAL BREAKFAST				
7:15 am - 8:15 am	SIGs: Special Interest Groups and User Meetings				
	Fraud and Data Analysis— A Key Feature of The Compliance and Ethics Program Brieh Guevara, CCA	S-Score: A New Tool for Standardizing Disparate Data Quality Measurements Bob Gaede, Intel Corporation			
8:30 am - 9:30 am	Survival of the Fittest: Data Management at the Crossroads Janet Nickel, Hallmark Cards, Inc.	How Does a Business Analyst Work With the Data Architect and Database Administrator? Barbara Carkenord, B2T Training, LLC	A Data Administration Success Story at Elkay Manufacturing or You Don't Know What You've Got Till It's Gone Diane Voyles, Elkay Manufacturing Company	Enterprise Business Metadata – A Starting Point Manish Malhotra	Data Warehousing and Semantics: How Do They Play? Neil Raden, Hired Brains
9:30 am - 10:00 am	COFFEE BREAK				
10:00 am - 11:00 am	How a Data Dictionary Spawned an Enterprise Model Diane Rollinson; Edward Bartholomew, University HealthSystem Consortium	Enterprise Information Architecture at Nokia Using Universal Data Models: A Case Study Len Silverston, Universal Data Models, LLC; Teemu Mattelmaki, Nokia Corporation	Ebusiness – From Presence to Transformation: A Data Architecture Journey James Fladger, Air Products	Metadata Implements Your Enterprise Architecture John Jones, National Institute of Health	Automated Metadata Utilization in the BI Environment Doug Stacey, Allstate Insurance Company
11:00 am - 11:10 am	ROOM CHANGE				
11:10 am - 12:10 pm	This Old Warehouse Kevin Light, Electronic Data Systems (EDS)	FEA DRM in Motion: Pioneering the DRM Implementation in the Federal Government Suzanne Acar, The Department of the Interior	The Future: eXtreme Data Warehousing Stephen Brobst, Teradata, a division of NCR; Richard Hackathorn, Bolder Technologies	Metadata Web Services for Performance Dave Beulke, Syspedia	Building Near Realtime Hybrid Data Management Systems Brahmaiah Jarugumilli, GE-Consumer Finance
12:10 pm - 1:15 pm	LUNCH				
1:15 pm - 2:15 pm	Data Warehousing – A Case Study: Finding Success After Failure Theresa Fletcher, PeaceHealth	It's All About the Data Dan Paolini, State of NJ - OIT	From Survivor to Activist – A Case Study of Data Management at the California Department of Education Sonya Edwards, California Department of Education	Managing Oracle's Metadata – What Your DBA Doesn't Want You to Know James F. Koopmann, Pine Horse, Inc.	Vocabularies: Ontologies Specialized for Data Architecture Dave Hollander, Contivo, Inc.
2:15 pm - 2:30 pm	COFFEE BREAK				
2:30 pm - 3:45 pm	KEYNOTE PRESENTATION & AWARDS: Everything is Miscellaneous (or the social significance of metadata) David Weinberger, Consultant and Author				
3:45 pm - 6:00 pm	EXHIBITS				
4:00 pm - 4:30 pm	In-Perspective Presentations – See conference web site for schedule: www.wilshireconferences.com				
4:45 pm - 5:15 pm	In-Perspective Presentations				
5:30 pm - 6:30 pm	SIGs: Special Interest Groups and User Meetings				
	Advanced Methodologies of Implementing Data Governance Martha Dembe; William Follmer, CIBER, Inc.	The Latest and Greatest in DBMS Features Craig Mullins, Embarcadero Technologies	Rochade SIG Bill Modica, HSBC	Pursuing a Data-Focused Career—A Fresh Look Ted Kowalski, Shell Oil Products	

Thursday, April 27

7:30 am - 8:30 am	CONTINENTAL BREAKFAST				
8:30 am - 9:30 am	The Rodney Dangerfield of Data Architecture – Data Profiling, It Gets No Respect Sandy Georgas-Gait, Laidlaw Education Services	The IT Value Chain Enabled: Data and Process Perspectives Charles Betz, Wells Fargo	The Future of Data Management R. Todd Stephens, BellSouth	Strategies for the Reluctants: Enabling Metadata Development Eric Landis, Natural Resources Information Management; Sharon Shin, Federal Geographic Data Committee Secretariat	Semantics in Data Warehousing and Integration Associates Data Modeling and ISO Standards Andrew Davis, Kalido, Inc.
9:30 am - 9:50 am	COFFEE BREAK				
9:50 am - 10:50 am	Who Said DMO? Alex Kerezy, Nationwide Insurance	A Matter of Corporate Survival: A Proven Pragmatic Approach of Aligning Data Architecture, Information Architecture, and BI Support with Business Strategy, Vision, and Direction Osman Tekes, ROTEK	Business Process and Data Modeling Integration in a Project for Stabilization and Rehabilitation Christine Hawkinson; Barb Kett, US DOI, Bureau of Land Management	Connection and Dispersion: Metadata Driven Taxonomy Development Barbara Nichols, Metaview360, Inc.	Master Data Management & Enterprise Data Warehouse – A Case Study of Implementing an Enterprise Data Hu Michael Gottwald, Ford Motor Company
10:50 am - 11:10 am	COFFEE BREAK				
11:10 am - 12:30 pm	CLOSING KEYNOTE: What Do Hollywood and Data Management Have in Common? "More Than You Think!" Marcie Barkin Goodwin, Axis Software Designs				
2:00 pm - 5:00 pm	SKILL SEMINARS				
	S1: Making DM Relevant to the Enterprise & Keeping Your Job Michael Scofield, Scofield Data Consulting	S2: How to Build a Data Warehouse in a Day Dan Paolini, State of NJ - OIT	S3: How to Design Build and Use an Ontology—A Guide for Data Mgmt. Professionals Dave McComb; Simon Robe, Semantic Arts		

Agenda at a Glance

Wednesday, April 26

					7:00 am - 8:30 am
					7:15 am - 8:15 am
ACADEMIC TRACK ZACHMAN FRAMEWORK TRACK					
Build Your Own Reference Service DB for a Service – Oriented Architecture Jonathon Storm, Port Townsend Paper Corporation; Laura Storm, EARTHTUNES	Show Me the Numbers: Communicating Effectively with Charts Stephen Few, Perceptual Edge	KEYNOTE Data Modeling Education and Practice: What's Being Used and What's Being Taught Michael Chilton, Kansas State University	Resources—the “New” Data Column Stan Locke, Zachman Frameworks Associates		8:30 am - 9:30 am
					9:30 am - 10:00 am
Wikipedia with an Attitude: Collecting and Using Business Semantics Bonnie O'Neil, Project Performance Corporation; Lowell Fryman, Enterprise Integration Solutions LLC	Information Visualization for Discovery and Analysis Stephen Few, Perceptual Edge	Metadata Research—Syntactic Semantic, and Pragmatic Perspectives Adir Even; G. Shankaranarayanan, Boston University School of Management	Metaframework Metamodels John Zachman		10:00 am - 11:00 am
					11:00 am - 11:10 am
XML Design for Form and Function Uche Ogbuji, Fourthought, Inc.	Best Practices: The BMO Story (Part 1)– Developing & Implementing an Enterprise-wide Information Mgmt. Prgm. Greg Keeling; Wayne Harrison, BMO Financial Group	New Research and Thinking in Advancing Data Quality Initiatives Frank Dravis, Firstlogic	Integration for Implementation Stan Locke, Zachman Frameworks Associates		11:10 am - 12:10 pm
					12:10 pm - 1:15 pm
Using Metadata For Semantic Interoperability: caCORE and the NCI's Cancer Biomedical Informatics Grid (caBIG) George Komatsoulis, NCI Center for Bioinformatics, NIH; Tommie Curtis, SAIC	Best Practices: The BMO Story (Part 2)– Information Classification, Security, Privacy & Metadata Challenges Wayne Harrison, BMO Financial Group; Greg Keeling, BMO Financial Group	Teaching Data Management Larry Burns, Paccar, Inc.	Generating Applications from Models Gary Simons, SIL		1:15 pm - 2:15 pm
					2:15 pm - 2:30 pm
					2:30 pm - 3:45 pm
					3:45 pm - 6:00 pm
					4:00 pm - 4:30 pm
					4:45 pm - 5:15 pm
					5:30 pm - 6:30 pm
		Expressing, Validating, and Implementing Advanced Constraints in Data Models Terry Halpin, Neumont Univ.			

Thursday, April 27

					7:00 am - 8:30 am
Supply Chain Management Using English Business Rules Over SQL Adrian Walker, Reengineering; Ted Kowalski, Shell Oil Products		A Proposal for Developing Undergrad and Graduate Model Curricula for Data Management Herbert E. Longenecker, U of S. Alabama; Deborah Henderson; Patricia Cupoli; Anne Marie Smith, DAMA-I Curriculum Committee	Are You Programming Primitives? David Kingston		8:30 am - 9:30 am
					9:30 am - 9:50 am
		450 Data Modelers Can't Be Wrong Graeme Simson, University of Melbourne	The Week That Was John Zachman		9:50 am - 10:50 am
					10:50 am - 11:10 am
					11:10 am - 12:30 pm
					2:00 pm - 5:00 pm

W1: Working with Corporate Politics to Help Data Management Succeed



Danette McGilvray
President and Principal
Granite Falls Consulting, Inc.

Do you dislike the politics in your company? Have you been frustrated by the people aspect of your data management initiatives? Often the failure of data management is due not to the lack of technical skills, but to a lack of support—support that can be gained only through applying people skills and navigating a complex corporate environment. This workshop will help you be more effective in working with others to implement and promote your company's information and data management goals. Key topics include the following:

- Identifying and working with your allies and opponents
- The importance of language—written, spoken, and body
- Making human nature work for you, not against you
- Real-life situations and how to handle them

Complement your technical skills by strengthening your people skills. Come prepared to participate and have fun while learning—this is a very interactive session. Leave with solutions tailored to your situation and data management objectives.

■ **Danette McGilvray** specializes in information quality management to support key business processes around customer satisfaction, decision support, supply chain management, and operational excellence. Her projects include enterprise data integration programs, data warehousing strategies and large-scale ERP data migrations for Fortune 200 organizations. For over ten years, she led information quality initiatives at Hewlett-Packard and Agilent Technologies. An accomplished program manager and facilitator, she is a respected expert on data profiling, metrics, benchmarking, data stewardship, and tool acquisition and implementation. Danette is an invited speaker at conferences throughout the US and Europe, and she is a member of DMReview.com's Ask the Expert panel. She has been profiled in *PC Week* and was an invited delegate to the People's Republic of China to discuss roles and opportunities for women in the computer field.

W2: Business Rules: What You Need to Know from A to Z



Ronald G. Ross
Principal and Co-Founder
Business Rule Solutions, LLC

What are business rules, and how can you apply them effectively in your organization? What pitfalls have other organizations made, and how can you avoid them? How can you get up to speed?

This tutorial reviews the concepts and techniques of business rules, and discusses what you need to know to be successful with them in your organization. The basic principles of the Business Rule Approach will be examined, and guidance will be offered about how to apply each one successfully.

In addressing these Principles, key techniques of business rule methodology will be discussed, including Policy Charters, Fact Models, and Rule Books. The role of process models will be examined, as will the need for rule repositories and rule management. In all, this tutorial will show you exactly what the Business Rule Approach means in practice, up-to-the minute, from A to Z.

- Concepts and Techniques of the Business Rule Approach
- How to Achieve Business Adaptability Through Business Rules
- Features and Deliverables of Business Rule Methodologies
- Organizing and Managing your Business Rules
- Lessons Learned
- Rethinking the Governance Process
- Establishing the Rule Management Function
- The Latest Trends and Emerging Standards

■ **Ronald G. Ross** is recognized as the “father of business rules.” He is Co-Founder of Business Rule Solutions, LLC which provides workshops, consulting services, and methodology supporting business analysis, business rules, and rule management. At BRS, Mr. Ross co-develops ProteusR, its landmark business rules methodology. He is an active member of the Business Rules Team, creators of the Semantics of Business Vocabulary and Business Rules (SBVR) which was adopted by the OMG in 2005. He serves as Executive Editor of www.BRCommunity.com and its flagship on-line publication, *Business Rules Journal*. Mr. Ross contributions were recognized by the awarding of the DAMA International Individual Achievement Award in 1995.

W3: “Actionable Solutions” for Data Governance, Stewardship & Metadata



Robert Seiner
President & Principal/Publisher
KIK Consulting & Educ Services/
TDAN.com

The topic of Enterprise Data Management has been debated for years. Is “Big” Data Management Dead? Can Enterprise Data Management be successful for any length of time in any organization? There is not a simple answer to this question. But Robert S. Seiner of KIKConsulting.com and TDAN.com thinks he has a practical answer.

Most organizations are considering, if not fully engulfed in, defining Data Governance, Data Stewardship and Metadata Management as important components of their data management, data integration and data quality initiatives. This session focuses on how to synchronize these efforts to address quality concerns, legislation concerns, audit, security and privacy concerns and to maximize the value organization's get from their data.

This interactive workshop will help attendees to formulate a plan to address all three of these disciplines and build effective data management for part or all of their organizations.

This session will focus on the following:

- Invoking practical disciplines for data governance, stewardship and metadata management
- Developing best practices and gaining management sponsorship
- Establishing the connection between data governance/stewardship and metadata management
- Engaging stewards to improve data and metadata quality and value
- Formulating an “actionable” plan to take home from the conference

■ **Robert Seiner** is the President and Principal Consultant of KIK Consulting & Educational Services. The firm focuses on Consultative Mentoring® to enable and improve data management capabilities. Mr. Seiner offers consulting and educational services in how to build and implement data management, governance with stewardship, and meta-data programs. He has recently consulted with notable companies including Walt Disney World, JPMorgan Chase, CISCO Systems, United States Air Force and many others. Mr. Seiner is the Publisher of an internationally recognized Internet publication focused on the management of data, information and knowledge as valued corporate assets. The Data Administration Newsletter, LLC (TDAN.com) is located at www.tdan.com.

W4: Universal Patterns in Data Modeling



Len Silverston
President
Universal Data Models, LLC



Paul Agnew
Consultant
Universal Data Models, LLC

Level: Advanced

A large portion of any data modeling effort involves very common types of constructs throughout the model. For example, many models involve the application of various roles, statuses, categorizations, hierarchies, instance to type entities, and rules. Having a common way to model these constructs can save time and increase that quality of a data model.

This seminar will help participants understand alternatives, pros and cons of various approaches, and pitfalls, enabling wise data modeling and design decisions. By understanding the various alternatives and what has worked well for other organizations, modelers make informed choices and use appropriate "patterns" to consistently model these fundamental data model constructs.

This dramatically different seminar teaches data modeling by example. We will mainly teach by allowing you to see real life examples of "best practice" models and patterns reinforced by class exercises. You will then have an opportunity to apply these fundamental patterns to your organization's data requirements.

Participants of this session will gain the following:

- Effective data model templates for modeling some of the most critical data model constructs in most data models.
- Alternative ways to model roles, statuses, rules, classifications, hierarchies and rules
- Pros and cons behind modeling various alternatives and suggestions for selecting the approach for your organization.
- Pitfalls in avoiding ineffective ways to model these critical constructs
- Experience in applying these constructs to your organization through hands on exercises

■ **Len Silverston** is the best-selling author of *The Data Model Resource Book* series, which describe over 230 reusable data models and which was rated #12 on the Computer Literacy Best Seller List. He has been a columnist for *Data Management Review* and has been a frequently invited speaker at many international conferences. His most recent book, which provides universal data models for various industries, has been translated into Chinese. He is the winner of the DAMA International Professional Achievement Award for 2004.

W5: How to Win Friends and Influence People with Painless Data Model Reviews



Karen Lopez
Principal Consultant
InfoAdvisors / ITBoards.com

You don't have to be part of a painful data model walkthrough, presentation or review ever again. This hands-on workshop will provide you with real world tips, techniques, and trade-offs in preparing for a data model presentation.

Workshop participants will learn the following:

- Tips for getting the best review comments from business users
- A technique for reviewing modeling objects in the right order and spending the right amount of time reviewing
- Trade-offs in presenting the material
- Resources for easing the pain of developing definitions
- 10 tips for getting the right people to review the right models
- Myths and Urban Legends about data model reviews

All participants will have the opportunity to showcase their own data model presentation skills.

■ **Karen Lopez** is a principal consultant at InfoAdvisors, Inc., a Toronto-based consulting firm. Karen has spoken at several DAMA conferences and DAMA Chapters. She has 20 years of experience in data management on large, multi-project programs. Karen specializes in the practical application of data management principles. Karen is also the ListMistress and moderator of the InfoAdvisors ITBoards Discussion Groups.

W6: Metadata Roadmap



Joyce Norris-Montanari
President
DBTech Solutions, Inc.

Level: Intermediate

In a recent survey of Data Management professionals, most indicated that their companies fail to understand the value of metadata. Over 70% of the companies who responded indicated that they don't manage metadata as a corporate asset.

Metadata is one of the many data management disciplines that most organizations fail to realize value until their data is in such bad shape they are forced to call in experts to help with the cleanup. The sad fact is that most companies spend more on data cleanup and compliance resolution than they would if they had institutionalized metadata management in the first place. Metadata provides the necessary information to better understand and utilize data. It's the corporate DNA that unifies business nomenclature throughout the enterprise. It ensures that everyone across the enterprise is reading and speaking from the same proverbial page: All the data management tools we use for profiling, quality enhancement, integration, ETL, and reporting rely on metadata. So why is there such an enormous lack of understanding of its value? The answer is simple. In most cases it's because most companies don't know where to start! This session explains in detail where to start and where you should be headed in designing and implementing successful metadata management at your company. First, we must demystify the mythology and folklore surrounding metadata and then define the elements from which to formulate a roadmap for implementation.

■ **Joyce Norris-Montanari** is an expert in ETL, data profiling, and metadata management. She has implemented data warehouses and operational data stores and developed application systems across mainframe, client/server and Internet architectures.

In addition to her consulting work, Joyce contributes articles to *DM Review*, *Database Magazine*, *B-EYE-Network*, and has coauthored *Data Warehousing and E-Business* (Wiley & Sons) with Bill Inmon.

“Excellent! Next year, I'm bringing my whole team! The toughest choice I had to make was which session to attend during each timeslot.”

Stephen Bell, MD Management Ltd.

W7: The Intel Metadata Program: A Best Practices Case Study



Jacque Gibson
Mgr. - Architecture Capabilities
Intel Corporation



David Ashton
Enterprise Metadata Architect
Intel Corporation



Thiru Thangarathinam
Enterprise Architect
Intel Corporation

Intel recognized the need for an enterprise metadata container and implemented a repository to support data management. This presentation is a case study from Intel Corporation of how the metadata processes and the metadata repository are used to capture and show tangible evidence, in terms of \$-value, that the productivity, governance, and alignment objectives of the enterprise architecture program are being realized. It includes a description of the metadata processes that support the creation and packaging of asset building blocks for work products and services. It also includes the philosophy and techniques for valuating and capturing reuse of these assets. It addresses the role of governance and the enterprise architecture framework, as well as the use of taxonomies to aid cataloging, administering, and searching for unstructured information resources, assets, and services. Finally, it provides Intel's experience about positive returns for the enterprise architecture program. Intel was recognized for its metadata program in 2004, when it received the Wilshire Award for Outstanding Metadata Implementation.

- Relationship between metadata, repository and architecture. How did we tie each strategy together?
- Our federated repository approach
- How did we determine appropriate standard work products?
- How were we able to achieve buy-in from the Architecture community?
- How did we align architecture work products to Enterprise Architecture?
- How metadata about services is captured in the repository, and utilized at design time by architects
- How the SOA repository improves program-ming productivity and increases re-use

■ **Jacque Gibson** has experience in Production Planning and Information Technology and she participated in Intel's initial ERP implementation. She and her team developed Intel's Metadata Program and implemented the Enterprise Metadata Repository.

■ **David Ashton** has 30 years experience, specializing in metadata and metadata repositories for over 10 years. He co-designed the first repository at

Intel, and was a key designer of the current award-winning Enterprise Metadata Repository.

■ **Thiru Thangarathinam** has extensive experience in architecting, designing, and developing N-Tier applications using Service-Oriented Architectures (SOAs). Thiru is currently the Enterprise Solution Architect for the Metadata and Reuse Repository application within Intel.

W8: Discovering Value from Text



Seth Grimes
President
Alta Plana Corporation

Text mining applies linguistic, statistical, and machine learning techniques to textual documents (news and scholarly articles, letters, e-mail, research notes, forms, transcribed audio, and the like) to automate their handling and facilitate the discovery of concept and entity-based relationships. It builds on content management, search, and data mining technologies to provide a powerful research tool.

The workshop will discuss business contexts and the technology. It will cover applications, techniques, and vendors and present case studies and an implementation roadmap.

■ **Seth Grimes** is a business intelligence, data warehousing, and decision systems expert and a consultant, contributing editor, and columnist for Intelligent Enterprise magazine. Seth founded Washington DC based Alta Plana Corporation in 1997 and consults, writes, and speaks on information-systems strategy, data management and analysis systems, industry trends, and emerging analytical technologies.

W9: Taxonomy Development and Implementation



Seth Earley
President
Earley & Associates, Inc

Organizations are embarking on taxonomy initiatives to serve a wide variety of audiences and purposes. Fundamentally these are metadata management projects, but business sponsors rarely see them in that light. In many cases, taxonomy initiatives are seen as separate from enterprise data initiatives. This workshop will go through taxonomy project processes for derivation, validation, testing, integration, rollout and governance. Attendees will be able to understand how taxonomy projects should be integrated with overall metadata management and the best ways to communicate their role to business users and sponsors.

- Taxonomy drivers
- Information architecture vs. Semantic architecture
- Project definition
- Audience selection
- Data gathering techniques

- Content review processes
- Term Extraction
- Creating search and navigation scenarios
- Search engine and content management system integration
- Testing and validation
- Training and Rollout
- Governance and integration with enterprise metadata management

■ **Seth Earley** is the founder and senior consultant for Earley & Associates, Inc. He has performed taxonomy development for a wide variety of organizations including projects for the IBM Office of the CIO, to develop new application architectures and refine system performance for a worldwide deployment, and for GE, to assist business unit leaders in architecting the GE Capital Virtual Boardroom, which spanned 30 plus business units. He is co-author of *Practical Knowledge Management* which focuses on taxonomy as the foundation for knowledge processes.

W10: Data Management 101



Peter Aiken
President
Data Blueprint: Department of
Information Systems, VCU

Level: Introductory

This tutorial presents an overview of current, state of the art data management practices. Participants will learn that data management has a relatively short history but can now be described using five functions:

- Data Program Coordination
- Enterprise Data Integration
- Data Stewardship
- Data Development
- Data Support Operations

When considered under the CMM umbrella, understanding these five processes, their interactions and associated sub-processes will help organizations to better focus their efforts and lead to the development of better organizational data management capabilities.

■ **Dr. Peter H. Aiken** spearheads the technological basis for Data Blueprint's research efforts. He has more than 20 years of business/information technology experience, is the author or co-author of numerous books and articles on data engineering, including *Data Reverse Engineering* (McGraw Hill 1996), *Building Corporate Portals with XML* (McGraw Hill, 1999) and *XML in Data Management* (Morgan Kaufmann, 2004). He was the recipient of the 2001 DAMA International Achievement Award. His clear and concise presentation style make him a sought-after speaker and he has spoken at numerous foreign and domestic conferences and events.

How Data Management Supports the CIO



Dan Weller
Director of Data Administration
APL, Limited



Nicholas Khabbaz
Enterprise Architect
e-Modelers, Inc.

As data management professionals, we have to align our goals and activities with those of the CIO. So what are some of the goals of a CIO?

- Aligning IT with the business
- Streamlining IT and making it efficient
- Communicating effectively with the business
- Educating the C level executives
- Establishing the right culture
- Hiring and keeping quality teams.

This session addresses an approach for data management that effectively supports each of the above goals of the CIO.

Oh No! Not Another @%!#&? Compliance Requirement!



Alan Perkins
Chief Solutions Architect
ASG Integrated Metadata
Management Solutions

First, there were internal financial statements and management reports, which were difficult enough. Then, different external stakeholders required “performance” reports. Now, there are more and more reports needed to demonstrate compliance with legislative and regulatory requirements (Sarbanes-Oxley; Basel II, etc.).

Unfortunately, most enterprises treat every new requirement as a brand new report that must be developed and produced independently—the result is increased operational and maintenance burden and reporting chaos.

It doesn't have to be that difficult or complex. This presentation describes using enterprise metadata to simplify, govern and enable compliance reporting—the result is an integrated, strategically-driven, architecture-based, reporting environment that can efficiently produce a myriad of compliance reports and flexibly react to new and changing requirements.

Conceptual Data Modeling: Resisting the Urge to Go Physical



Pete Stiglich
Senior Consultant
EWSolutions

Data Modelers, Data Analysts, Application Developers or DBAs often have a tendency when developing a new data store (whether Transactional or Decision Support) to immediately start developing a Physical Data Model. However, for best results Conceptual Data Models should be developed prior to Logical Models, Dimensional Models and Physical Models.

Developing a Physical Data Model before Conceptual, Logical and Dimensional (if appropriate) models can lead to less than optimal production systems that add additional complexity, require extensive maintenance and result in poor extensibility.

Conceptual Data Modeling is a very effective means for reflecting your understanding of business requirements back to business analysts for validation. Conceptual Data Models also provides effective documentation of business subject areas—knowledge is retained in the models—not just in someone's head.

Securing Sensitive Data



Satya Sachdeva
Senior Principal
Knightsbridge Solutions

Level: Business

According to a Gartner Group study, more than three percent of U.S. consumers were victims of identity theft during the 12 months ending June 2003; information is now used as a currency for committing crimes.

Beyond impacting consumers, the crime also affects businesses in a big way. In addition to the direct losses as a result of fraudulent charges, firms lose stock value, brand equity and, above all, lose customer trust. They could also be the target of class action law suits if data stolen from the firms leads to cases of identity theft. Compromised firms have historically lost an average of two percent of their market value within two days of a data security breach. How can companies protect and secure sensitive data? This presentation will cover an overall approach to the following:

- Inventory and categorize sensitive data
- Identify all the touch points
- Define vulnerabilities and risks
- Describe various options to mitigate the security risks

The Rise and Fall of an Enterprise-Wide Semantic Model: A Case Study



John Schley
Specialist, Data Administration
Nationwide Insurance

Enterprise-wide logical and conceptual data models, also called “semantic models,” have amazing power to align and focus the business, but they are often perceived as pie-in-the-sky solutions in search of a problem. This case study will recount the creation of an enterprise-wide semantic model that was carried out with speed and efficiency to the acclaim of business and IT alike. It will describe how both top-down and bottom-up approaches were used to quickly create conceptual and logical versions of these models and incorporate them in the day-to-day activities of the enterprise. And it will detail how initial successes turned into ultimate failure of this worthy endeavor.

- Ways to describe the benefits of semantic models
- How to combine top-down and bottom-up approaches to deliver results quickly
- How to integrate semantic models into day-to-day work processes
- Who to involve in the prioritization, creation and maintenance of the models
- What to do when success turns to failure

A Revolution in Data Governance and Metadata Management at NDCHealth



Paul Dyksterhouse
Director Information Mgmt.
NDCHealth

Pamela Hulse
Data Access Manager
NDCHealth

NDCHealth's Information Management division is a data factory. Accumulating, Cleansing, Packaging and Selling data is our business. We take in 10 million pharmacy transactions per week and produces sales, marketing and research knowledge for pharmaceutical companies. The challenge faced, was that with years of legacy systems and over 70 terabytes of data warehouse data, would we be able to meet the growing HIPAA and contractual requirements of managing data access and distribution?

This is the story of how we revolutionized data governance. As newer members of the NDCHealth Information Management team, Pamela Hulse and Paul Dyksterhouse faced technical, process, and people challenges to address data access and distribution requirement in a changing business environment.

T1: Enterprise Architecture Principles and Values — Straight from the Source!



John Zachman
Founder
Zachman International

Level: Introductory

For those who understood the value proposition, Enterprise Architecture has always been important. Yet it is only relatively recently that the concepts and benefits of Enterprise Architecture have started to be embraced by a significant number of organizations at a senior level. Perhaps, like the Internet—which existed for almost 25 years before it finally captured widespread attention—the time for Enterprise Architecture has finally arrived!

Given this resurgent interest, who better to explain the principles behind Enterprise Architecture than the man himself, John Zachman, the originator of the “Framework for Information Systems Architecture” During this workshop John will explain how and why Enterprise Architecture provides value, and the four reasons why you “do” Architecture including alignment, integration, change management and reduced time to market. Without Architecture, there is NO WAY you can do any of these things. This presentation begins with a brief definition of what Enterprise Architecture is, and then develops the logic as to its value to the Information Age Enterprise.

■ **John Zachman** is the author of the “Framework for Information Systems Architecture”, which has received broad acceptance throughout the world as an integrative framework for managing change in Enterprises and in the systems that support them. He travels nationally and internationally, teaching and consulting, and has facilitated innumerable executive team planning sessions. As a conference speaker, John known for motivating messages on information issues. John Zachman is a member of the International Advisory Board of DAMA International.

T2: Logical Data Modeling



William Smith
Principal
William G. Smith & Associates

Suggested Prerequisite: Solid understanding of Conceptual (ER) Modeling

Data Modeling is a fundamental skill for any data professional. Data Modeling is normally divided into three distinctly different and sequential phases: Conceptual, Logical, and Physical. This tutorial presents a very complete overview of Logical (data element level of detail) Data Modeling (LDM). The tutorial defines all terms used in LDM, describes a very pragmatic, efficient process for creating a LDM by working with business users, and takes the student through each of those steps with many examples and illustrations of the deliverable of each step. The presentation emphasizes a RULE-BASED modeling method to be used by the modeler, which ensures that the resulting model would be identical (given the same information requirements) regardless of who the modeler(s) are. It is recommended that any attendee of this tutorial be familiar with Conceptual Data Modeling.

■ **William G. Smith** is one of America’s most recognized consultants and teachers in the disciplines of information resource management, data resource management, and process and data modeling. His international client list includes the gamut of large and small companies and governmental agencies spanning a wide variety of industries and governmental functions.

T3: Danger, Danger! Bad Data Ahead!



Claudia Imhoff
President
Intelligent Solutions, Inc.

Level: Introductory

Sarbanes-Oxley, Basel II, the USA PATRIOT act, the EU Directive on Data Protection. Enron, MCI/WorldCom, Parmalat, Barings Bank. Overruns, account errors, audits, theft, missing inventory, overtime pay, employment discrimination.

Any and all of these explain why data quality is critical to a business. More expansive reporting requirements and data privacy restrictions require more thorough and accurate data management. Corporate fraud and mismanagement, either hidden by lax data control policies or caused by reliance on inaccurate data, wreak havoc in the marketplace. Everyday profitability and competitive advantage are challenged by inaccurate, untimely and unavailable data.

What can you do? What should you do?

Join Claudia Imhoff for a discussion of the risks and consequences of relying on poor-quality data. Learn ways to measure and monitor your data quality to determine if you’re satisfying your data quality requirements. Find out how you can identify and encourage data accountability company-wide. High-quality data is no guarantee that you’ll be safe from all the dangers of fraud and mismanagement, but an effective data management policy can minimize the chances of finding your business on the wrong side of the road.

After attending this seminar, you’ll understand the following:

- The challenges and benefits of data quality programs
- How to create a data quality program
- Processes and steps within each process for improving the quality of data
- The roles and responsibilities of the data quality function
- What tools and solutions are available to solve data integration challenges
- Discover how to identify the true state of corporate data and how to integrate enterprise data onto a single, reliable platform

■ **Claudia Imhoff** is a popular speaker and internationally recognized expert on Customer Relationship Management and the infrastructure to support this initiative—the Corporate Information Factory. Dr. Imhoff has co-authored five books on these subjects. She also has a weekly newsletter, has an expert channel on the B-EYE-Network’s website (www.B-EYE-Network.com), and contributes articles to many other journals and publications. She has served on the Board of Advisors for DAMA International and is an advisor and a faculty member for The Data Warehousing Institute. She won the 1999 and 2005 Individual Achievement Awards from DAMA International and is an advisor for several technology and commercial companies.

“This was an excellent covering of all the topics, most data professionals would need to demonstrate their value to the organization.”

Pushpak Sarkar, Merck & Co.

T4: Developing a Sustainable Enterprise Data Strategy



John Ladley
Director
Navigant

Level: Business

The impact of information on an organization is changing. In addition to the traditional “efficiency gains” from data strategies, companies are now confronted with high-risk situations (e.g. Sarbanes-Oxley) as well as the need to truly change their business through using information.

At one time, data strategies implied figuring out what kind of mix of information delivery, data quality and repository “stuff” to buy and assemble. Now the data strategy must not only be able to manage and deliver information; it must be a sustainable, business-aligned process that not only manages information assets, but also manages corporate risk.

During this one-day tutorial, attendees will learn how to create a sustainable data strategy. The emphasis will be on business alignment and value, risk mitigation, and designing and deploying a cost-effective, useful data strategy program. We will cover structured and unstructured content. Several case studies will be reviewed to provide insight. This class will also cover the underlying frameworks (metadata, business intelligence, etc.) but is not a class in selecting tools or technology.

Session Outline will include the following:

- Data Strategy vision and alignment
- Designing the architecture
- Defining the most effective delivery framework
- Developing a sustainable road map for implementation
- Business cases for information value management

■ **John Ladley** is an internationally known information management practitioner and a popular speaker on information and knowledge management. John is widely published and has several regular columns. John is a Director with Navigant Consulting. Prior to Navigant, John founded KI Solutions, John was Senior Program Director of Data Warehouse strategies and a Research Fellow at Meta Group. Mr. Ladley is an authority on information architectures, business performance measurement architectures, knowledge management, collaborative applications, and information resource management. In January KI Solutions was acquired by Navigant Consulting.

T5: BPM 101: An Introduction to Business Process Management and BPM Systems



Brett Champlin
President
Association of BPM Professionals

Level: Introductory

Get up to speed on BPM in one day. Come to this course to learn the key terms, concepts, methodologies, techniques, and technologies in the BPM arena. What is a process? What is process management? What is Business Process Management? What is a Business Process Management System? What are the pros and cons of the different approaches to implementing BPM? Learn about the practices and the technologies that are making BPM the most exciting new approach to solving business problems with new technologies today:

- Process Modeling
- Process Analysis
- Process Design
- Components and structure of a BPMS
- Enterprise Process Management Program Planning
- Key Skills, Roles and Responsibilities in implementing BPM

■ **Brett Champlin**, MBA, CCP, CDMP is the President of the Association for Business Process Management Professionals (ABPMP.org) and a Manager in the Business Performance Improvement group with a large insurance company. Brett has led business process transformation projects for the last 15 years.

Brett has been a popular speaker at international conferences and professional associations for over 10 years. He has over 25 years of experience working in Information Systems Management.

He teaches in MBA and MSIS programs and is a member of the adjunct faculty at Roosevelt University and the University of Chicago, where he teaches a seminar on BPM. He has served on the board of directors of DAMA International and the Institute for the Certification of Computing Professionals (ICCP). He contributed a chapter on process modeling to the publication “Guidelines for Implementing Data Resource Management” and is an occasional contributor to various trade publications.

T6: Effective Management of Master Data



David Loshin
President,
Knowledge Integrity, Inc.



Malcolm Chisholm
President
Askget.com Inc.

At the heart of any enterprise data environment lies its Master Data, consisting of entities such as “customers,” “products,” “locations,” etc. that must be populated to ensure the smooth operation of the organization’s operational transactions as well as its business intelligence and analytical processing. Yet, the traditional approach to vertical application architecture has led to distribution and replication of master reference data across different databases and systems, which introduces a number of challenges to effective master data management, such as:

- complexity introduced due to local vs. centralized update strategies
- variations in entity life cycles by different applications that change the ways that individual instances are identified
- different ways of categorizing and classifying entities are obscured through clusters of code tables and mappings
- limited governance of change control leads to problems in historical reporting

Not only that, but inadequate Master Data management is both impacted by data quality problems, and can cause issues that permeate the enterprise, reducing efficiency and limiting the scope of the enterprise’s operations. These kinds of business impacts are becoming more acute today, and enterprises are realizing that they need to manage their Master Data if they are to take full advantage of their information assets.

- What Master Data is, and why it represents a special class of data with unique management needs.
- The problems that can arise from inadequately managed Master Data.
- How to detect and mitigate data quality issues that originate in Master Data.
- The role of data quality technology in Master Data management.
- Enterprise architecture designs that address the management needs of Master Data.
- Strategies for the consolidation of Master Data.
- Management strategies for governance of Master Data, especially local versus central updating.
- Life cycle management for Master Data.
- Management of changes to reference data that categorizes Master Data, especially in the context of historical reporting.

■ **David Loshin** is an internationally recognized expert in Information Quality and the author of the books *Enterprise Knowledge Management—The Data Quality Approach*. (Morgan Kaufmann, 2001) and *Business Intelligence: The Savvy Manager's Guide* (Morgan Kaufmann, 2003). He hosts an expert channel at the Business Intelligence Network, serves on the Editorial Board of, and provides a monthly column for DM Review magazine, and is a quarterly featured columnist for the Data Administration Newsletter.

■ **Malcolm Chisholm** is an independent consultant focusing on metadata engineering and data management. Over the past 25 years he has worked in a wide variety of sectors and IT environments. His focus has been to find ways to leverage metadata assets to improve business efficiency and effectiveness. He is the author of "How to Build a Business Rules Engine" and "Managing Reference Data in Enterprise Databases" and frequently writes and speaks on these topics.

T7: Managed Metadata Environment Full Life-Cycle Roadmap



David Marco
President
EWSolutions

Effectively metadata management is no longer an option, but an absolute requirement for corporations and government agencies. Companies have realized that without metadata their IT departments cannot manage their systems and their systems are not providing true value to the business end user. Organizations are implementing managed metadata environments (MME) to provide them an enterprise metadata management solution.

This practical course leverages the lessons learned from companies that have successfully deployed MMEs. The case studies demonstrate the importance of having a methodology for defining metadata requirements, capturing and integrating metadata, MME architectural components, how to calculate ROI, and develop a project plan, advanced metadata architectures, pulse-of-the-market analysis of metadata integration tool vendors, methodology for defining an attainable project scope, and a presentation of the Data Stewardship Framework. This course is adapted from Mr. Marco's book *Universal Meta Data Models* (John Wiley & Sons, 2004). You will learn:

- Six Architectural Components of the Managed Metadata Environment (MME)
- Metadata Extraction Layer
- Metadata Integration Layer
- Metadata Repository
- Metadata Management Layer
- Metadata Marts
- Metadata Delivery Layer
- Real-World MME Case Studies
- Analyze Metadata Tool Vendors
- Developing a MME Architecture
- MME Architectural Approaches
- MME ROI
- How to Sell a MME Project to Business Executives
- Data Stewardship Framework

■ **David Marco** is an internationally recognized expert in the fields of data warehousing, enterprise architecture and business intelligence. He is the author of several widely acclaimed books including *Universal Meta Data Models* and *Building and Managing the Meta Data Repository*. Mr. Marco has published hundreds of articles and is a regular columnist for several technology magazines and has served as a judge in dozens of industry awards. In addition, in 2004 Mr. Marco was selected to the prestigious Crain's Chicago Business "Top 40 Under 40". Mr. Marco has taught at the University of Chicago and DePaul University, and is the founder and President of EWSolutions, a GSA schedule and Chicago-headquartered strategic partner and systems integrator.

T8: The Business of Metadata



R. Todd Stephens
Dir. of Metadata Services Group
BellSouth

Level: Introductory

This tutorial focuses on the formulation and implementation of an enterprise metadata strategy. Participants will learn techniques to understand the role of metadata in the development of Enterprise Business Intelligence (EBI) and Enterprise Application Integration (EAI). The Metadata Services Group within BellSouth has spent the last six years developing an enterprise metadata solution based on a solid product line and a customer service focus. This tutorial will develop the attendees understanding of how to develop a successful enterprise metadata implementation that creates value over the long term. We will examine the principles of marketing, selling strategies, service offerings, product design, architecture, team construction and overall strategy of delivery for an enterprise metadata solution in both the structured and un-structured world.

■ **Todd Stephens** is the technical director of the Metadata Services Group for the BellSouth Corporation, an Atlanta-based telecommunications organization. Todd has served as the director since 1999 and is responsible for setting the corporate strategy and architecture for the development and implementation of the Enterprise Metadata Repositories. For the past 20 years, Todd has worked in the Information Technology field including leadership positions at BellSouth, Coca-Cola, Georgia-Pacific and Cingular Wireless. In addition, Todd is an Adjunct Professor at Lagrange College in Lagrange, GA.

Todd writes a monthly online column in DMReview and has delivered keynotes, tutorials and educational sessions for a wide variety of technology conferences. Todd holds degrees in Mathematics and Computer Science from Columbus State University, an MBA degree from Georgia State University, and a Ph.D. in Information Systems from Nova Southeastern University. Todd has been awarded nine U.S. patents and pending patents in the field of Metadata and is a co-author for an upcoming book for web-enabled applications.

“Excellent conference well organized with a large list of interesting topics presented by quality speakers.”

Joel Ouriou, Canadian Pacific Railway

T9: Crossing the Bridge from Unstructured Data to Structured Data and the Data Warehouse Environment



William H. Inmon
President
Inmon Data Systems

Level: Introductory

For a while now there has been the question of how to meaningfully get data from the unstructured environment to the structured data warehouse environment. Merely pulling data from one environment to another with a search engine does not address the context of unstructured data, and context of unstructured data is extremely important. Based on the research by Bill Inmon and Inmon Data Systems over the past three years, this full day tutorial and workshop addresses the thematic approach to reading and interpreting unstructured data so that it is useful in the data warehouse, structured environment. The details of how to go from unstructured data to structured data without using linguistic approaches is outlined in a clear manner. In addition, some different applications of unstructured data in the data warehouse structured environment will be discussed.

PART I - Lecture

- Unstructured data—what is it?
- Why unstructured data is important to address
- The unstructured marketplace
- Why crossing the bridge between the two environments is important
- Search engines—where do they fit
- Link associations
- Two approaches—the linguistic approach, the thematic approach
- The linguistic approach
- Complexity
- Single language problem
- The thematic approach
- A simplistic and efficient approach
- Ability to handle multiple languages

PART II - Exercises

- | | |
|---|---|
| <ul style="list-style-type: none"> • Stop words • Stemmed words • Synonyms • Alternate spellings • Document attribute id • Operating on multiple languages • Linkage by secondary keys | <ul style="list-style-type: none"> • Internal categories • External categories • Hot word categories • Ranking words based on occurrence • Linkage by common keys • Cross referencing with metadata |
|---|---|

PART III - Lecture

- | | |
|--|---|
| <ul style="list-style-type: none"> • Visualization • Executive dashboard • CRM • Compliance • Email management • Space reduction • Why put unstructured data in the data warehouse after it has been processed? | <ul style="list-style-type: none"> • Finding natural associations • Alerts based on content found • Ranking customers attitudes • Sarbanes Oxley • Finding blather |
|--|---|

■ **Bill Inmon**, world-renowned expert, speaker and author on data warehousing, is widely recognized as the “father of data warehousing.” He is creator of the Corporate Information Factory and more recently, creator of the Government Information Factory. As an author, Bill has written more than 650 articles on a variety of topics about building, using, and maintaining the data warehouse and the CIF. His works have been published in *Data Management Review* and *The Business Intelligence Network*, where he continues to be a featured columnist. He has written 46 books, many of which have been translated into nine languages; one has sold over one-half million copies. As entrepreneur, Bill founded and took public Prism Solutions in 1991. In 1995, Bill went on to found Pine Cone Systems, later named Ambeo. In 2003, Bill co-founded Inmon Data Systems, Inc. and created the Government Information Factory, an architectural blueprint for building government information systems.

T10: Consulting Skills for Data Professionals



Graeme Simson
Senior Fellow, University of Melbourne;
Principal, Simson Associates



Level: Business

As every data professional knows, the toughest part of the job is engaging the business: understanding their requirements, winning their support, and meeting their expectations.

These are consulting skills—and even if you’re “only” providing services within your own organization, you’re a consultant—like it or not! And many of the techniques that the best external consultants use are equally relevant to you. In this workshop, Graeme will share principles, techniques and tips learned from 20 years of building and managing a successful consultancy. He’ll show you how to:

- Gain a deeper understanding of business needs and priorities
- Define high-value projects and gain business buy-in
- Negotiate and manage expectations
- Deal with problems—and difficult people
- Build effective long-term relationships

This is a heavily interactive workshop, with time set aside for discussion of case studies and issues raised by attendees. We should add that external consultants, particularly those working independently, have also found Graeme’s consulting skills workshops valuable!

■ **Graeme Simson** is one of the best known and most influential voices in the data management field. Always controversial, always prepared to question the conventional wisdom, and his own ideas as well, he is identified with some of the most important ideas and trends in data administration and data modeling over the past decade. He built and managed a successful consultancy which grew to some 70 staff covering IS planning, process re-design and systems specification as well as data management and data modeling. During this period, he continued to take on consulting assignments himself, primarily facilitating business and technology planning at the senior management level. Graeme enjoys a reputation as an outstanding and entertaining communicator. His book, *Data Modeling Essentials* (Morgan Kaufmann), now in its third edition, is widely regarded as the clearest work on the topic.

“A conference that is state of the art on Data Management and should not be missed. Well done DAMA and Wilshire Conferences!”

Rita Nagle, Alltel

Build or Buy a Metadata Repository?



Malcolm Chisholm
President
Askget.com Inc

Repositories store and manage metadata, and a greater range of repository functionality is necessary to manage today's ever increasing data management needs. A number of commercial products are available, and it is often assumed that purchasing one will probably meet the needs of any particular situation. However, this is not always the case, and it can sometimes be better to build one. This presentation focuses on how to make the decision of buying versus building. It deals with common misconceptions that can drive users to make the wrong decision, and offers a guide for choosing whether to buy or build a repository. It draws heavily on the presenter's own experience in building, buying, and advising vendors on their products. Main topics covered are the following:

- Why repositories are varied and not all the same
- Truths and misconceptions about building and buying
- How to understand repository requirements and develop use cases
- What to ask a vendor, and understanding true cost of purchase
- What to require from a development team
- Managing risk in development

Applying the TOGAF Methodology to Enterprise Architecture



Thiru Thangarathinam
Enterprise Architect
Intel Corporation

This session will focus primarily on the use of TOGAF for implementing Enterprise architecture. There is a lot of focus on the EA Frameworks like Zachman, E2AF, and so on, when it comes to implementing the data architecture and subsequently, enterprise architecture. Although all these frameworks provide an excellent classification approach, they do not provide actionable steps that you could use to build out your enterprise architecture. TOGAF, as a methodology, exactly fills this gap by providing a process to populate your enterprise architecture framework. As part of the enterprise architecture build-out, TOGAF also recommends what is known as an Enterprise Continuum (equivalent to a metadata repository) as a key component of your implementation strategy. In this session, I would like to talk about the key concepts of TOGAF as they apply to Enterprise Architecture, Data architecture, and specifically, to a metadata architecture implementation.

Collaborative Functional Requirements Development for Large Fixed Bid Applications



Ravi Sankar
Assistant Vice President
Satyam Computer Services

Rambabu Yeleti
Senior Consultant
Satyam Computer Services

Level: Advanced

We present a new reusable methodology called EUReqA (Evolutionary Use Case Driven Requirement Engineering Approach) that we have developed to collaboratively and efficiently create detailed Functional Specifications for Large Fixed Bid System Development Projects. EUReqA uses an multistage iterative approach for the objective of creating detailed, functional specifications. The method followed is analogous to the RUP methodology that is used end-to-end to develop the system itself.

EUReqA uses a 4 stage iterative approach—Discovery, Elicitation, Creation and Transition to build rapport and agreement and build system entities that are acceptable to both functional and technical teams and are understood by both.

The key benefits of the methodology are that the project team developed about 200 number of use cases in about 3 months of elapsed time. The methodology was very well received, and Team picked up more champions for our deliverables at each iteration so that the final deliverables went to executive sign-off with unanimous consensus from all interested parties. The key learning was that the boundaries of the work to be done within each iteration should be transparent, each user group should be communicated with clearly, all stakeholders ensured an opportunity to provide input into the decisions relating to the new "one integrated" process, and the total body of work divided into narrower manageable segments.

“Anyone serious about Data Management needs to be here.”

Sam Hughes, Johnson & Johnson

DAMA's CDMP: A Way of Differentiating Yourself Professionally



Patricia Cupoli
ICCP Liaison
DAMA International

Level: Introductory

DAMA International's Certified Data Management Professional (CDMP) program is for the experienced data professional. DAMA has been collaborating with the ICCP to develop vendor and product neutral data exams for this certification program. Available data exams include Data Management, DBA, and Data Warehousing.

The CDMP credential is awarded to those who qualify based on a combination of criteria including education, experience and test-based examination of professional level knowledge. This credential is offered at the Mastery or Practitioner level. To maintain certified status and continued use of the credential, an annual recertification fee along with a 3-year cycle of continuing education and professional activity is required.

This presentation covers the following:

- Process of becoming a CDMP
- Benefits to the data professional
- Exam preparation process
- Review of outline subject coverage for CDMP exams
- Discussion of Data Management exam topics and sample questions

Enterprise Wide Data Integration and Master Data Management

David James
Senior Data Architect
IBM

The operational landscape for most large global enterprises, especially those with heavy mergers, challenges the success of the business in many ways: High and redundant IT costs, redundant master sources such as Customer and Product Dimensions, and slow B2B operations against disparate data sources to name but a few. The purpose of this session is to outline the steps and techniques to follow to improve the overall IT operation by driving the establishment of horizontal architectural thinking and the development and deployment of master data references.

We will consider the following areas:

- Technical architecture considerations
- Data architecture development
- Service oriented architecture
- Master data reference selection
- Master data delivery (custom and package applications)

RFID Data Management



Larry Dziejczak
Johnson & Johnson

Level: Business

Radio Frequency Identification (RFID) is an existing technology that is re-emerging because of technological innovations. These improvements will ensure fast and accurate information access, cost effective identification of physical packages and location identification throughout the world via data retrieved from a tiny electronic chip. Analogies are sometimes drawn with bar-codes, however RFID information can be read without the need for unimpeded, line-of-sight scanning, so it is much more flexible than barcode technology. Many analysts believe RFID will revolutionize certain industries, especially those such as manufacturing, shipping and retail, which involve the tracking of millions of packages throughout the supply chain. The implications for collecting, storing and organizing the data generated by RFID systems is truly enormous, not to mention the accompanying privacy, security and usage issues that are raised by this new technology. Larry Dziejczak has been working deeply with these issues for the past year and will bring you up to speed on this exciting new technology and the implications it has for data management.

How Enterprise Information Integration Can Add Value to an Enterprise Reporting Architecture



Hans Yeager
Partner
SH Group

Level: Introductory

Enterprise Information Integration (EII) software is a relatively new type of data integration application. In fact, most of the EII products have been released since the beginning of the new millennium. As a result, EII is not widely understood and its definition is still evolving. The purpose of this session is to describe the how EII software can fit into an enterprise reporting architecture, complementing the other data integration elements, enterprise application integration (EAI) and extraction transformation and load (ETL). The session also aims to describe the benefits and typical applications of EII software in the different phases of the data warehouse lifecycle. The final section of the presentation describes the different factors that are typically considered in evaluating EII software:

- Enterprise Information Integration (EII) described
- Typical applications of EII
- How (EII) fits in enterprise reporting architecture
- Benefits of EII
- Evaluating EII software

Leveraging Metadata to Automate the ETL Process



Tom Harrocks
Senior Principal
Knightsbridge Solutions

A common goal of enterprise data warehouse (EDW) projects is to use metadata to facilitate the ETL. By defining business rules within a rigorous technical framework and using coding templates for data manipulation, significant proportions of the ETL code in a data warehousing project can be automated. Automation reduces maintenance costs, improves code quality and provides higher precision testing.

A major health insurer was concerned with providing a basis for automated code generation while retaining business value. The insurer developed a framework for storing enriched technical metadata to support business rules, semantic translations and data lineage. The accuracy and completeness of the technical metadata was ensured by providing a migration utility to import source and target database schemas. An interface was developed that associated business rules with a specific source to target transformations.

This innovated approach created dramatic efficiencies in creating and maintaining accurate metadata. The organization reduced development time by 50% and ongoing maintenance by 25%.

In this case study-driven session, learn how to address the following:

- Integrate technical and business metadata
- Identify and utilize templates with metadata to automate process
- Automate semantic translations
- Reduce development costs and response to changes in the data model
- Maximize the robustness of DML operations
- Leverage optimization efforts across the project
- Validate the business and technical

This presentation is intended for intermediate and advance-level data warehouse architects.

What Does the “Level” of the Session Mean?

You’ll notice that a “Level” (such as Advanced, or Business) is indicated on many of the sessions. This is in response to the many requests we’ve received in the past to indicate the educational and technical level of each presentation, so that you can better determine which session are right for you. Briefly, the ratings work like this:

- **Introductory.** These sessions assume little or no prior knowledge of the subject matter in order for the audience to benefit from the presentation.
- **Intermediate.** This is the “Default” rating. The vast majority of the presentations have been prepared for professional data management practitioners with at least 3–5 years experience in the field, so by far the largest percentage of presentations fall into the Intermediate category. Because it is the default rating, we therefore have not included it above the description.
- **Advanced.** Sessions may be defined as advanced for a variety of reasons, including that they require a deep technical knowledge, or a sophisticated understanding of a complex subject.
- **Business.** Obviously most of the sessions at the conference have some sort of business impact, however the “Business” level is used to describe sessions which are suitable for business staff (rather than IT).

The Zachman Framework: The Practice of Enterprise Architecture

This year in Denver we're delighted to be working closely with Zachman Framework Associates to provide you with an entire conference track devoted to the Zachman Framework. For those attendees who have heard John Zachman speak at this conference before, or perhaps at DAMA meetings around the country, this is your chance to go beyond the concepts of the Framework and delve more deeply into the advanced topics and implementation details. And for attendees who haven't yet had exposure to the Zachman Framework, this is an unbeatable opportunity to start from the beginning (you should attend John's Monday tutorial) and learn directly from its originator.



John A. Zachman

The sessions are organized to sync up with the rest of the conference agenda, so you are able to pick and choose which topics you'd like to attend in the Framework track. You'll notice that prerequisite topics are suggested, which hopefully will guide you in terms of getting the most from each subsequent topics. However we should stress that you're not excluded from any particular session based on these prerequisites. Meanwhile, if you'd like to do any background reading about the Zachman Framework, please visit the conference web site at www.wilshireconferences.com/MD2006 to find some relevant articles and links.

The Speakers:



David A. Kingston
Implementation Engineer

David is graduate of the Computer Engineering discipline from the Applied Science Program at University of Toronto with a specialty in Software. He spent his Professional Experience Year (PEY) with Zachman Framework Associates primarily engineering a proof of concept Zachman Repository. Upon graduation then continued in a research, audit and review capacity within the Zachman Group.



Dr. Gary Simons
Associate VP Academic Affairs
SIL

Gary's extra-ordinary skills of Linguist, Computer scientist and AI background have contributed to the clarification and precision of the Zachman Framework. While teaching field linguistics and consulting on digital language documentation Gary has made major contributions to the Ethnologue (a publication inventorying the peoples and languages of the world, the Enterprise Architecture of SIL and to the EA standards. In addition, Gary has undertaken the creation of an extensible markup tool called GEM which generates applications based on the primitives in the framework.



Stan T. Locke
Managing Director
Zachman Framework Associates

Stan lectures on the implementation of the framework concepts, bringing a practical business perspective to the framework logic. Since graduate school, his special interest is in the management methodologies required to define an enterprise and the ways in which this can be represented in repository technology. Stan has been the architect of the Zachman standards under John's direction, model builder of the hexagon implementation constructs and directs the applied research through ZFA.



John A. Zachman
CEO
ZIFA, Zachman International & Zachman Group

John lectures tirelessly, criss-crossing the entire globe more than 18 times in the past two years. His amazing understanding and experience around the framework have been an uplifting experience for many people. His significant contribution to the oversight of the Enterprise Architecture Standards this past two years and his insight into the needs of the modern enterprise as the information age comes into focus will be hallmarks of 2005.

Monday, April 24, 2006

8:30 am – 4:45 pm

T1: Enterprise Architecture Tutorial: Enterprise Architecture Principles and Values—Straight from the Source!

John Zachman

The description of this tutorial appears on page 14.

Tuesday, April 25, 2006

10:30 am – 11:30 am

Z1: Standards Certification

John Zachman

There are some significant reasons for the development and publication of the Enterprise Architecture Standards and they have influenced the selection of terms in the Zachman Framework metamodel. This presentation addresses the question “Why do we need Enterprise Architecture Standards and why is this significant to me in the data practice?”

Suggested Prerequisite: *Zachman Tutorial*

11:45 am – 12:45 pm

Z2: Speedy Complex Changes

Stan Locke

The characteristics of the Information Age are now becoming much more clear and include extreme complexity and extremely high rates of change. From the perspective of the recipient of the Enterprise's products and services (from the customer's perspective), the Enterprise will have to be integrated and will have to dynamically respond to the marketplace demands. This presentation addresses the question, “What value does the Framework have in the large complex enterprises of today's information economy?”

Suggested Prerequisite: *None*

2:00 pm – 3:00 pm

Z3: Custom Standard Elaborations

Gary Simons

Every culture is unique and has its own unique culture and vocabulary. Any published “standards” have to be constraining to the extent that they enforce commonality within a discipline but not so constraining that their employment is precluded in a particular Enterprise. This presentation addresses the question, “How do I make the Standards care for our own view, methodology and terminology in my enterprise?”

Suggested Prerequisite: *Standards Certification*

3:30 pm – 4:30 pm

Z4: Management Maelstrom

John Zachman

Enterprise Architecture is an ENTERPRISE issue, not a technology issue. There are Enterprise Management reasons why Enterprise Architecture as defined by the Zachman Framework is critical to an Information Age Enterprise. This presentation answers the question, “What are the leading issues that encourage management to engage in the practice of building the Enterprise in a rigorous fashion?”

Suggested Prerequisite: *Zachman Tutorial; Speedy Complex Changes*

Wednesday, April 26

8:30 am – 9:30 am

Z5: Resources — the “New” Data Column

Stan Locke

John Zachman has always maintained that Column 1 of the Framework, the “Data Column” was misnamed because not all of the Cells of the Column are not Data Models. Some of the models have nothing to do with data. They have everything to do with the “things” (the Resources) that the Enterprise cares enough about to manage. This presentation addresses the question, “What do the content of the cells look like in the expanded Resource column of the Zachman Framework? How will this change my life?”

Suggested Prerequisite: *Standards Certification*

10:00 am – 11:00 am

Z6: Metaframework Metamodels

John Zachman

The Zachman Framework is inert. It does not know what you are using it to analyze. It is simply a schema for descriptive representations. There may be more than one application of the Zachman Framework in the context of an Enterprise. There may be peer Frameworks and there may be meta Frameworks. This presentation addresses the question, “What do you mean there is more than one Zachman Framework?” Discover the hidden treasure of the second (1992) IBM Systems Journal article.

Suggested Prerequisite: *Standards Certification*

11:10 am – 12:10 pm

Z7: Integration for Implementation

Stan Locke

The Zachman Framework is simple. It is simply a two dimensional classification system for descriptive representations of anything, specifically as it typically is depicted, of Enterprises. Enterprises are complex. A much more accurate scale model of an Enterprise would be three-dimensional. The

Enterprise is the total aggregate set of composite constructs that constitute the horizontal, relationships between the Framework primitive models. This presentation addresses the question, “Why is a primitive two dimensional classification not sufficient for perceiving (and understanding) the complex relationships of holistic objects?”

Suggested Prerequisite: *Metaframework Metamodels*

1:15 pm – 2:15 pm

Z8: Generating Applications from Models

Gary Simons

The concept of model-driven implementations of Enterprises has been around for many years but has been illusive in its realization. One reason is likely because the models from which we have attempted to derive the Enterprise implementations have not been “primitive” models as conceptualized by the Zachman Framework. Given the Zachman Framework Standard Metamodel, this presentation addresses the question, “Is it actually possible to have the Executive Leaders work with an Architectural Engineer to generate record keeping Applications?”

Suggested Prerequisite: *Integration for Implementation*

Thursday, April 27

8:30 am – 9:30 am

Z9: Are you Programming Primitives?

David Kingston

It is not adequate to simply define some of the higher Rows of the Zachman Framework. The people doing the actual work of implementing the Enterprise (that is, of building the Enterprise's systems at Row 5) must preserve the integrity of the primitive architectural constructs. Otherwise, you will end up with more legacy even though good architectural work has been done. This presentation depicts an actual case study and addresses the question, “Is there some reason that I should care about how the implementation configuration (or Row 5) is assembled or produced?”

Suggested Prerequisite: *Integration for Implementation*

9:50 am – 10:50 am

Z10: The Week that Was

John Zachman

This session explores some of the implications of the Zachman Framework Standards and speculates where the concepts of Enterprise Architecture are likely to go into the future. It also addresses the question, “Are there some important things that I saw this week that will change my thinking when I sit down at my desk on Monday?”

Suggested Prerequisite: *Standards Certification*

TUESDAY, APRIL 25

7:30 am – 8:30 am

PowerDesigner SIG



Michael Nicewarner
Data Analyst
John Deere Credit

Level: Data Management - Introductory

The PowerDesigner SIG provides an open forum to discuss experiences and techniques with the most popular modeling tool. We will talk about the following:

- The various model types (ERD, UML, BPM, XML, etc.)
- Techniques and best practices when using the tool
- Issues, ideas or bugs to send back to Sybase

AllFusion ERwin Special Interest Group—Tips, Tricks & Suggestions



Marcie Barkin Goodwin
CEO
Axis Software Designs

Level: Data Management - Advanced

"If you obey all the rules, you miss all the fun."
Katherine Hepburn

This SIG will focus on a discussion of CA's AllFusion ERwin Data Modeler—its functionality as well as tips and suggestions to enhance the tool's productivity. Facilitated by the President/CEO of Axis Software Designs, a Model Management Services and Education company specializing in AllFusion Product Suite training and model management infrastructure consulting, this SIG should elicit personal experiences of tips and shortcuts, as well as "Don't Dos!" from the audience. Come to learn, and come to share.

Information Integration for Science Intelligence



Richard Hackathorn
President
Bolder Technology, Inc.

The presentation explores how the infrastructure of Business Intelligence can be applied to large-scale scientific endeavors to produce "smart" science. The information analysis of contemporary business and science are similar, unlike prior decades. Can this similarity be exploited to support Science Intelligence?

De-mystifying the Relationship between Web Services, Service Oriented Architecture and Data



Laila Moretto
Senior IT Advisor
The MITRE Corporation

The proliferation of information about Web services is overwhelming. The evolution to Web services is powerful, after all it enables the creation of services that can be accessed from any kind of computer, regardless of its physical location, programming languages, and platform. More importantly, organizations are interested in this evolution because it is intended to simplify business processes.

The exponential growth and promise of Web services is coupled with an exponential confusion in the industry. Many organizations think that by moving to Service Oriented Architecture (SOA) and by implementing Web services that their data challenges will disappear. Many organizations think that by making their data visible and accessible that they will achieve interoperability. Without proper understanding of the fundamentals of Web services, SOA and their relationships to data, the confusion will continue to compound. This presentation is aimed at de-mystifying those relationships in hope that the audience will gain some understanding that will enable them to think differently when solving their Information Technology (IT) challenges.

The presenter will discuss the following:

- De-mystifying the relationship between Service Oriented Architecture (SOA) and Web services
- The core components of Web services and how they work together to provide a service
- De-mystifying the relationship between Web services and data
- Real industry case regarding Web services and data
- Federal example of data sharing implemented in Web services

10:30 am – 11:30 am

Phoenix Rising: It Was a Dark and Stormy Night...

Amy Pfaff
Sr. Database Software Administrator
TIAA-CREF

Charlie Bach
Database Software Administrator Consultant
TIAA-CREF

Level: Introductory

Discuss the successes and failures of the implementation of our Data Management Initiative including the Enterprise Metadata Repository, sprinkled with touches of humor. This will include the perils of funding or lack thereof, management support, and other roadblocks we've encountered in our quest. We'll poke fun at our stumbles and hopefully pro-

vide enough information to keep others from making the same mistakes we did. Along the way, we will address topics such as dealing with politics, vendors, IT naysayers and business community dreamers.

- Original Hopes and Dreams
- Building the dream team and infrastructure
- The Quick Win—Was it?
- New budget year, no budget *?!%&
- Death of the dream team
- Phoenix rising from the ashes

Managing Business Complexity



Archie Abaire
Metadata Architect
Circuit City Stores, Inc.

One of the major drivers of cost, in implementing computer systems, is complexity. The common intuitive notions of complexity often give us a misleading sense of how complicated a particular implementation is. For instance, level of detail presented, degree of abstraction, and degree of subject matter expertise all affect our perception. Attempts to minimize complexity, frequently, are misguided and lead to more complexity, rather than less. A basic understanding of the properties of systems provides us with better ways of characterizing their complexity. When talking to non-technical people, we frequently do things that result in added complexity because we do not realize how our audience perceives what we are saying and doing. Knowledge of these factors allows us to do a more effective job of keeping costs and expectations under control.

- How intuitive notions of complexity lead us astray
- A system model that explains complexity
- A definition of complexity based on the model
- Differences between technical and non-technical people
- Suggestions on how to convey the right message

Data Modeling Contentious Issues



Karen Lopez
Principal Consultant
InfoAdvisors / ITBoards.com

Level: Advanced

A highly interactive and popular session where attendees evaluate the options and best practices of common and advanced data modeling issues, such as the following:

- Party/party role
- Natural vs. surrogate keys
- Class Models vs. Data Models
- SOAs, Ontologies, ESBs, New TLAs and Shoe Strings

- What is Logical? What is Physical? Why Do We Care?
- Politics vs. Customer Satisfaction
...and others

Participants in this session will be presenting with an issue, along with a range of responses or possible solutions. Participants will vote on their preferred response, then the group as a whole will discuss the results, along with the merits of each possible response. If the specific issue has been discussed in other presentations, a summary of the responses of the other groups will be presented.

The goal of this workshop is to help practitioners identify potential points of conflict in data modeling, as well as alternative approaches to resolving the issues. This presentation is targeted at experienced data modelers and assumes extensive data modeling skills.

Harmonizing the ISO 11179-3 and CWM Metadata Standards



Mark Riggle
CTO
Causal Aspects

Level: Advanced

Two influential metadata standards are ISO 11179-3 and the Common Warehouse Metamodel (CWM). The 11179-3 standard is used to facilitate system data integration, and the CWM standard models artifacts needed for data warehousing applications, which includes data movement among systems. They therefore have great overlap in their problem spaces and in their concrete modeled items, however, their approaches are substantially different. Harmonizing the two metamodel standards is critical, as information in repositories based on both standards are combined.

- Design and use of the core ISO 11179-3 standard metamodel
- Basics of the design and use of parts of CWM
- Common areas of the two standards
- How they are harmonized
- Applications of the combination

Enforcing Data Quality Through Data Lineage Metadata



David Plotkin
Data Quality Manager
Wells Fargo Consumer Credit Grp.

Understanding and improving information quality (IQ) almost always involves knowing where data came from, the business (and data quality) rules applied to it, where those rules were applied, and any transformations the data went through. That is, you must understand and document the metadata around data transformations. You will learn how to build an information chain and the many ways that

information chain can help you understand and document data lineage, rules, assigning of stewardship, and semantic mapping. A basic metamodel will be presented, for recording transformations in a metadata repository, and how to customize the metamodel to add more detail for business rules and the rule application point will be explained. You will learn processes to record and implement business rules and how to segregate data that fails the rules. You will also learn the process and cultural implications of implementing rigorous IQ through metadata management. A case study will document actual cost savings.

Using Metadata to Deploy Successful Enterprise Marketing Systems



David Raab
Principal
Raab Associates, Inc.

Level: Introductory

Marketers must increasingly combine data from disparate systems to gain a complete view of each customer and to coordinate customer treatments throughout their organizations. This session explores the role of metadata in permitting such data sharing, reviews strategies for developing marketing-specific metadata, and examines several existing implementations. Topics will include the types of data required for different tasks, including marketing analysis; operations management and execution; shared dimensions and disparities when using the same data for different purposes; existing formal and de facto metadata standards for selected marketing data sources; special issues related to marketing tasks, such as predictive model deployment and cross-channel message delivery; and the promise vs. reality of new technologies such as SOA and XML.

Safely Migrating Legacy Systems: A Legal-risk Averse Approach



Peter Aiken
VCU/Data Blueprint

Tim Krantz, Esq
McGuire Woods

Luke Anderson, Esq
McGuire Woods

Level: Business

This session is based on a data migration project that went wrong. Perhaps typically, a contractor did not do a good job preparing for and implementing a migration to PeopleSoft. After the project had extended to twice its original cost and time length,

the two parties sued and counter-sued each other—the total cost of the case eventually went to more than \$6 million. Contractually the case went to arbitration. This discussion examines what when wrong and how these issues could and should have been avoided.

- Project management responsibilities beyond the contractual obligations
- Risks management responsibilities
- State of the practice data migration standards
- Due diligence responsibilities
- Vendor “methodologies”
- Required standards of care and production

Metadata Integration (Part 1): Best Practices



Christian Bremaeu
President, CEO
Meta Integration Technology, Inc.



John R. Friedrich II
Director, Professional Services
Meta Integration Technology, Inc.

Most organizations have several tools—CASE and modeling tools, data integration (EAI, ETL, EII) and data warehousing tools, business intelligence (BI, OLAP) reporting and analysis tools. The ability to interoperate between those tools—for example, to trace the data lineage across BI, to ETL, to Mart, to DW, to ETL, to CASE, etc.—is absolutely critical to the business. Increasingly, thanks to the metadata integration and standardization efforts of the OMG, Meta Integration and others, metadata can now be captured and represented commonly between these different environments, allowing for effective version and configuration management, impact analysis, lineage analysis, and numerous other benefits. This session offers use cases to show how customer organizations can take advantage of these industry developments.

Z1: Standards Certification

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

TUESDAY, APRIL 25, 2006

11:45 am – 12:45 pm

The Evolution of Data Management at the FAA



Diana Young
FAA Data Registrar
Federal Aviation Administration

The quality and reliability of FAA's information and data resources are vital to air traffic management, aircraft and pilot certification, and other aviation safety functions. As with many organizations, information sharing and data management activities have been challenged by cultural influences and the powerful empires within the agency. This presentation will discuss the early FAA data management initiatives within a limited portion of the agency; the program's expansion into international and interagency disciplines; and its current transition into a true enterprise-wide information/data management program. Also included will be discussions on what helped to break down the empire walls, governance, and other lessons learned along the way.

Leveraging Legacy Data

Corinna Martinez
Enterprise Project Portfolio
CalPERS, State of California

Level: Business

There are so many web applications and customer self service types of applications with fancy front ends. What are they delivering if there is no tie-in with legacy databases? We will review how to marry legacy data to web applications for customer searches and new ways of using existing data. Some tools and techniques for conditioning data and connecting new front ends to older back end databases.

Putting the I Back in IT



Kjell Wittmaack
Chief Knowledge Officer
Platon A/S

Level: Introductory

Information technology has fundamentally changed the way people think and communicate and how companies organize their processes and compete with each other, but still the information stored within those systems typically seems to be a source of problems rather than a source of fast and innovative solutions and decision making. The key reason for this is typically that information is not viewed as a strategic resource, and hence it is not managed as such. The proactive Information

Architect and CIO need to address this key issue in a visionary but pragmatic way. The answer is enterprise-wide Information Management step-by-step.

- Why it makes sense to have a holistic approach for Information Management covering the mission, architecture, technology, organization and policies
- How Business Intelligence, Data Warehousing, Master Data Management, Metadata Management, Integration and Semantics fit
- How to implement an Information Management program
- How Information Management will affect existing processes and policies

Enterprise Information Integration: A Pragmatic Approach



JP Morgenthal
Managing Partner
Avorcor, Inc.

Level: Introductory

Enterprise Information Integration (EII) is a relatively undefined space. Some equate EII with virtual or federated query, while others equate EII to ETL and other forms of integration. In this presentation, Mr. Morgenthal provides a vision and pragmatic approach for EII where EII is defined as the automated process of turning data into information. By attending this session, you will learn why EII is a new form of integration and how it can be used to help your organization succeed.

Bridging The Gap—Increasing Semantic Awareness in Today's Information Systems



John Singer
Data Architect
Mastercard International

Level: Introductory

An increasingly competitive and regulated global economy demands a level of business data semantics that may be unobtainable using today's technology stack. The W3C has proposed a radically new approach to information management based on the RDF and OWL standards. Can the nascent Semantic Web technologies solve these problems, and how does today's IT practitioner bridge the gap from 20 century unit record processing to a truly semantically rich information processing world? For "mainstream" IT professionals this will be a process of discovery akin to the emergence of relational and distributed computing 25 years ago.

- Understanding the metadata disconnect and how it impacts everything you do in IT today
- Comparing today's technology stack to the emerging world of semantics

- Looking at possible evolution paths as semantic technologies make their way into IT ecosystem
- Three Starting Points for applying Semantic Technologies: Content Management; Master Data Management; and Metadata Management

Semantic Seeds: Maintainable Configuration Dataload Using Ontologies



Stu Baumann
Lead Instructor
LogicU

Level: Advanced

Business applications have long used RDBMs to store configuration data alongside user transactions. Such configurations are increasingly complex, and their proper seeding during testing and production presents a significant challenge that often falls, unrecognized, into the gap between Data Management and Software Development organizations.

Part of the solution lies in using more efficiently maintainable artifacts to control the dataload process. Hand-edited SQL scripts are sufficient for some seeding tasks, but when schemas grow in complexity to encompass rich typing systems, a more expressive paradigm is required to bridge the gap from the RDBMS view to the application layer, which is usually driven by a set of nested classifications (e.g. object-oriented inheritance).

Our experience shows that ontologies form an appropriate substrate for building such dataload solutions. In this advanced talk, we discuss the adaptation of object-relational systems to accept frame-based configurations for a spectrum of deployment scenarios. We draw upon examples in the financial and legal domains.

- How configuration data impacts system quality
- Making dataload repeatable and maintainable
- The role of metadata in system configuration
- Relating ontologies to UML/ERD models
- Mapping from RDF/OWL to SQL
- Making frame mappings simple and flexible
- Exploiting web services for configuration

“Outstanding organization; the cream of the crop for data professionals.”

Ron Klein, BMO Financial Group

Being a Good ERP Customer

Bob Stanley
Project Manager
Data Blueprint

Level: Business

ERP implementations are high dollar and high risk endeavors for businesses. There is plenty of evidence that if done correctly, the movement to an ERP system can provide strategic benefit for an enterprise. Unfortunately, there is also evidence that such an effort can become a death march that seems to never end. While much is advertised about the qualities, experience and methods of major ERP implementers/contractors, the success or failure of an ERP project can just as easily be driven by the actions of the customer. This presentation will focus on the steps a customer can take to minimize risk, save considerable time and money, and get the most from their ERP contractor. Case examples will include common errors, project controls, customization tradeoffs, and contractual protections.

Metadata Integration (Part 2): Vendor Panel



Christian Bremau
President, CEO
Meta Integration Technology, Inc.



John R. Friedrich II
Director, Professional Services
Meta Integration Technology, Inc.

(See conference web site for Invited Vendor Panelists)

The second part of our discussion of metadata integration includes the experts of major data modeling, data integration (ETL), business intelligence (BI), and metadata repository vendors who are responsible for making interoperability possible between their disparate tools. In this panel of tool developers we will learn how each one approaches the metadata component of their system and how they make it available to other vendor tools. We all know that the available solutions are not perfect yet, so what are the challenges and opportunities as the vendors see them, and what can you as the customer expect to see in future software releases and build-outs?

Z2: Speedy Complex Changes

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

TUESDAY, APRIL 25, 2006

2:00 pm – 3:00 pm

ERP Data Models for OUR Enterprise



Corine Jansonius
Data Architect
Shell Canada Limited

We have never had a comprehensive set of data models for our ERP system (JDE). The models we do have are piecemeal, some being generic vendor models while others were done for individual projects. This is a common problem with ERPs and other 3rd party applications—either no data models exist or the models are generic and do not accurately reflect the local implementation.

We are planning a consolidated effort to model our ERP environment. The goal of this project is to provide a base set of models that will facilitate IT cross-training, application support and data integration. We have already completed the first two steps, identifying the data modeling approach we plan to take and developing a detailed list of instructions on how to produce the models most effectively. We will be piloting the approach to validate the practicality and effectiveness of our instructions and the resulting models.

- What types of model will be most effective (subject area, logical, physical)
- The level of detail to which we are documenting the ERP
- What modeling techniques are bringing the biggest benefits
- How will we source this initiative without impacting ongoing development and support

Taking Data Quality Metrics to the Boardroom: A Case Study



Lowell Fryman
Founder
Enterprise Integration Solutions LLC

Ask any business or technical “C” level executive if data is an asset, and the answer you are likely to hear may be “Yes, our data is a strategic asset and critical to our competitive advantage.” Then ask how that asset is valued and managed, or what metrics for the data assets are reported to the leadership team and board of directors. We all know “you can’t manage what you can’t or do not count.”

This seminar represents a case study recently done with a media company that has been in the yellow page printing business for decades. Recently the CEO had publicly stated that their data was a “competitive asset.” Yet, a metrics or quality improvement program was not in place. The seminar will include discussion on the following:

- The challenges faced by the enterprise
- How data was determined as “valuable”
- The Critical Success Factors
- How metrics were reported (presentation is King)
- Tailoring metrics for differing audiences
- Proactive metrics monitoring and quality improvement program

Understanding Subtypes/Supertypes: The Data Modeler’s Most Important Construct



Gordon Everest
Professor Emeritus
University of Minnesota

Entities, attributes, relationships, identifiers, and foreign keys are important data modeling constructs, particularly for relational databases, but subtypes and supertypes (S/Stypes) are even more important. Relational DBMSs do not handle S/Stypes. However, many data modeling CASE tools do, so data modelers need to understand how to properly use these constructs. S/Stypes are important for the data modeler, who can now defer choosing what objects to materialize or what (relational) tables to build until later in the database development process. S/Stypes offer a means to formally represent overlapping entity/object populations at the beginning of the design process. If you are not using S/Stypes in your data modeling, or want to deepen your understanding of these constructs, this is for you. In the first part of this in-depth “double session” we expect to discuss:

- Situations which motivate the need for another data modeling construct
- Definition of subtypes and supertypes—characteristics of a subtype-supertype “relationship”
- Abstraction mechanisms: specialization vs. generalization; attribute vs. entity abstraction
- “Universal relation” (vs. no entity types at all)
- Single vs. multiple inheritance, or the type hierarchy vs. a type lattice
- Declaring constraints on a S/Type relationship
- How to design relational tables to represent a S/Type relationship
- Inheritance in data models vs. inheritance and reuse in OO design (they are not the same)
- Inheritance priority, blocking, and overriding—how these concepts apply (or not)

Strategic Planning for Master Data Management



Jim McQuade
Data Administrator
Giant Eagle, Inc.

Is your data infrastructure aging? Historically, many companies allowed their applications to develop in vertical silos defined around business function. However, in today's horizontally aligned business model, a new challenge surfaces: the need to share common reference data across silos. In a vertically aligned business model, much data about critical concepts are locked away without easy and efficient ways to make them available to other business units. Further, business units often compete for the "ownership" of these concepts. Finding a rational strategy for sharing that is acceptable by business and technical stakeholders is challenging. This seminar explores the practical issues in the planning, coordination, and marketing of the business and technical solutions for Master Data Management.

- The practical means to create a strategic data infrastructure plan
- Understanding of key data architecture alternatives
- How to identify critical data repository elements
- The importance of road mapping and harvesting low-hanging fruit
- How to market and sell the plan to management and your peer stakeholders
- How to secure funding and resources
- The possible organizational changes you may need to make

Building Metadata with What You Have Around the Office



Dawn Michels
Enterprise Information Architect
Andersen Corporation

Metadata is an important corporate asset that is all too often overlooked and under-funded. The organization often expects their data professionals to produce metadata out of whatever is available around the office, and to slip it in between other project priorities. It is no wonder that so many projects, data and otherwise, do not have proper metadata documentation.

This presentation will give some down to earth examples of putting together your own home-spun Metadata Repository. The topics covered include the following:

- Types of Metadata
- Tools for accessing and retrieving metadata
- Tools for sharing metadata
- Making the case for ROI on Metadata
- Uses of Metadata

A new practitioner will take home steps to proceed with, while a season practitioner may learn some methods for persuasion.

Using Metadata to Drive ETL Processing



Richard Bartsch
Data Architect
Caremark

This discussion describes the use of application metadata as the central element in the design of a system that transforms and loads raw medical claims files, replacing ad hoc, custom development for each new client. The system features metadata to implement the following:

- Shared file layouts
- Automated value translations
- Automated QA/QC statistics collection
- System based job scheduling

Reusable modules have eliminated all coding of QA/QC reporting and most ETL coding. Existing mapping documents were modified slightly to provide the source of metadata, making the business owners integral participants in the process and relieving IT of the task of translating non-standard documents to code.

The use of application metadata and indirect coding techniques have resulted in an application that allows quick implementation of new clients, accelerated processing of production data feeds, and the ability to scale as necessary to handle a large client load.

Manufacturing Supply Chain Analytics: Information Integration Techniques for Increased Business Effectiveness (Part 1)



Andres Perez
Sr. Information Mgmt. Consultant
IRM Consulting, Ltd. Co.

Supply Chain Analysis, from demand forecasting to actual production, requires the integration of information across multiple platforms and systems. This is a case study presenting the approach and results from an effort to deploy a highly integrated Supply Chain Data Mart in a highly distributed and fragmented environment. The presenter will review the business situation that lead to the chartering of this effort, the critical business objectives, the critical design considerations, the rationale for using "fact-dimensions" for the data design, the data movement process for data integrity using the standard ETL tool, and the implementation techniques for high performance. The presentation also includes a description of the "Event Management System;" a supporting capability to enable the collection, notification and analysis of events. Events are usually

caused by defective information detected early on in the data movement process. The system provides immediate (e-mail, fax) notification to the affected parties of events. Also, provides custom and ad-hoc reports using the standard BI tool for current events and for event trend analysis. This in-depth session provides the attendees with advanced analysis and design techniques that are practical and can be readily applied to their own situations.

Semantics: What it Means for Data Professionals



Dave McComb
President
Semantic Arts

Level: Introductory

Semantic technology is about to explode in the marketplace: independent projections suggest a \$60 billion industry by the year 2010. The good news for the DAMA community is that people with data modeling and analytic skills are in a terrific position to capitalize on this trend. Semantic technologies are those that take advantage of a more formal, and computer interpretable, expression of the meaning of the information stored in our systems. With semantic technology we will be tagging metadata as well as instance data with ontologically agreed terms, in a way that our systems can use to improve search, integration and more.

- What are semantics, and why should I care?
- Taxonomies and ontologies
- RDF and OWL: the open standards for the Semantic Web
- Semantic Brokers: how they are changing the face of EAI
- Semantic Search: getting beyond keywords
- Structured and Unstructured information
- Underlying semantic disciplines, including category and prototype theory

Z3: Custom Standard Elaborations

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

"Excellent conference well organized with a large list of interesting topics presented by quality speakers."

Joel Ouriou, Canadian Pacific Railway

TUESDAY, APRIL 25, 2006

3:30 pm – 4:30 pm

Improving the Data Management Processes in Your Organization Using the Data Management (DM) Scorecard



Pushpak Sarkar
Lead Architect - Information Mgmt.
Merck & Co.

Following the Sarbanes Oxley Act, risk management has become a major issue to business stakeholders and their data. Large companies must comply with strict, mandatory IS audits annually. The timing is now ideal for data professionals to examine whether a Scorecard-driven approach can help us as a process improvement framework. We need to regularly assess, track and measure the data management processes in our organization. As DM stewards, we can assess the maturity of our data organization using the "Data Management Scorecard" and communicate the value of our efforts back to the stakeholders in a clear and objective manner. This presentation can provide significant help to those organizations that genuinely care about their "data." If your organization aspires to be a world-class leader in this area, then the Data Management Scorecard can help measure the progress of your DM governance efforts as well as compare your state of DM maturity against other leading organizations.

- Why is the Data Management Scorecard a viable tool for IS process improvement?
- Identification of appropriate metrics and maturity levels for DM organizations
- Maintaining the DM Scorecard and crucial role of ongoing governance

Management is Not Enough: A Consolidated, Enterprise-Level Data Governance Framework



Gwen Thomas
President
The Data Governance Institute

Level: Advanced

Data governance and data stewardship have never been more important—and potentially more confusing! Companies must achieve and maintain compliance for multiple laws and regulations: Sarbanes-Oxley, HIPAA, Basel II, and others—all of which require enterprise-level data governance. Each part of the company champions a different compliance framework: COSO, COSO-ERM, COBIT, ITIL, ISO 17799, and ITSM, which use different terminology for similar activities. IT departments also need to implement data access and data privacy programs, electronic security efforts, and disaster recovery

plans—but all of these efforts require boundary-spanning decision-making, new checks-and-balances, and a mix of theory and practical techniques. The choice now is whether to implement a dozen disparate governance efforts or a single consolidated enterprise-level data governance program. This session describes a universal framework that can be applied to all of these efforts to meet governance and compliance needs. It outlines organizational structures, decision-making patterns, communication and information collection, processes, and other components needed to move from the 90s paradigm of "Just Do It!" to the post-compliance paradigm of "Do it, Control it, Document and Prove It"

Understanding Subtypes/Super-types: The Data Modeler's Most Important Construct (Part 2)



Gordon Everest
Professor Emeritus
University of Minnesota

This is the second part of a double session (the first part is at 2:00-3:00 pm). The overview of the session can be found on page 25. Attendance at the first part of the presentation is strongly recommended in order to best understand this section.

Questing for the Grail: The Post-mortem of a Federated Metadata Management Project.

William Brooks
Data and Integration Architect
MFS Investment Management

Beginning in late 2002, MFS began developing a strategy for integrating and managing a wide variety of business and technical metadata. The centralized project team, within the company's IT group, sought to develop an approach to store and provide access to metadata from physical databases, an XML-based messaging infrastructure, ETL tools, data modeling tools, and enterprise scheduling systems. The project accomplished many of its goals, but still fell far short of the "holy grail" it had intended to produce: a unified, universal Metadata Repository. Although not a stunning success, the project was far from a failure. Bill will explain the nature of the project, why it didn't meet its original lofty goals, and the lessons that MFS has been able to integrate into its subsequent metadata (and data) management approach.

Genentech Customer Master—An MDM/CDI Implementation



Mehmet Orun
Principal Systems Architect
Data Services, Genentech, Inc.



Stephen Thompson
Senior Manager, Commercial Info & Sales Operations
Genentech, Inc.

Level: Data Management - Advanced

For an organization, the ability to consistently define who it considers to be a Customer is a challenging but important task, and the effort to be able to identify an individual customer across multiple departments, applications, and processes, even more so. Genentech went live with its Customer Data Integration (CDI) solution as part of its information strategy through close collaboration between IT and the business. In this presentation, the business owner and original IT architect for the solution will present their experience and perspectives of the implementation, future steps, and anticipated challenges for the business and IT/IM communities.

- Why a Customer Master?
- Sponsorship and Solution Architecture Selection
- Implementation Approach, Challenges, and Successes
- Beyond Customer Master—Business Intelligence and other Master Data Management solutions

Managing Metadata at the Veterans Health Administration—A Case Study in Sharing a Metadata Registry



Roger McCreery
President
Integrated Computer Strategies Corp.



Kathleen Gundry
Program Manager
(SAIC)

Level: Introductory

The Veterans Health Administration (VHA) embarked on a data management program with the development of a metadata registry (MDR) to support their data standardization program and to document their diverse applications. The VHA MDR is based on the ISO/IEC 11179 standard for metadata registries, and features a new platform-independent java-based user interface for query

and data maintenance. VHA is also working to broaden the application to meet the data management needs of the entire VA. The "Registration Authority" component of the ISO metamodel is used to organize and separate the metadata managed by the organizations. This MDR effort will also support standardized terminology at VA and interagency sharing. This presentation will demonstrate the new MDR interface, made available for reuse by the VHA.

- The background of the MDR, which is based on the EPA's Environmental Data Registry
- The MDR modernization, a new J2EE version that provides database-and platform-independence, supporting 2 registration authorities
- Methods of metadata population, including automated metadata extraction from legacy applications and data warehouses
- How the ISO/IEC 11179 metamodel is used to separate and share metadata between organizations and to interface with VHA structured terminology sources

Manufacturing Supply Chain Analytics: Information Integration Techniques for Increased Business Effectiveness (Part 2)



Andres Perez
Sr. Information Mgmt. Consultant
IRM Consulting, Ltd. Co.

This is the second part of a double session (the first part is at 2:00-3:00 pm). The description of the session can be found on page 26. Attendance at the first part of the presentation is strongly recommended in order to best understand this section.

Semantics: The Semantic Web



Dave McComb
President
Semantic Arts

Level: Introductory

The Semantic Web is alive and well, and may be the next big thing to hit the internet.

This presentation is a fast paced description of semantics, and why we need formal, machine understandable descriptions of the meaning in our systems. We will cover the Semantic Web standards stack, including RDF, RDFS, OWL and SWRL, and explain them in terms that make sense. We will wrap up with several live demos of tools and web sites that use the Semantic Web.

Z4: Management Maelstrom

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

WEDNESDAY, APRIL 26, 2006

7:15 am – 8:15 am

Fraud and Data Analysis— A Key Feature of the Compliance and Ethics Program

Brieh Guevara
Manager
CCA

As organizations continue to accumulate data at an ever-increasing pace, companies must find efficient methods for turning that data into information. With occupational fraud showing no signs of abatement and with recent legislation expanding the responsibilities of management to prevent and detect fraud, data analysis in the monitoring system is more important than ever. In this session, we will discuss the data analysis process, tools, techniques, and applicability in satisfying company objectives related to control and fraud deterrence.

S-Score: A New Tool for Standardizing Disparate Data Quality Measurements



Bob Gaede
Logistics Data Quality Manager
Intel Corporation

As companies pay more attention and resources to measuring and improving Data Quality, it is important to have the capability to score, summarize, and report quality improvements using standard formats and processes. Standardization not only makes the concept of measuring quality understandable, it also allows disparate measurements to be compared and combined at all levels of detail. Additionally, it provides the ability to look at quality in innovative ways for analysis and improvements.

The methodology described in this presentation uses concepts and tools used in other areas but utilized for the first time to create a standardized quality score, or "S Score." This methodology has been tried and proven, and the results are significant. By sizing, standardizing, scoring, and summarizing quality results, dramatic improvements in Data Quality have been demonstrated across Intel's supply network.

WEDNESDAY, APRIL 26, 2006

8:30 am – 9:30 am

Survival of the Fittest: Data Management at the Crossroads



Janet Nickel
I/T Sr. Analyst - Data Architect
Hallmark Cards, Inc.

Enterprise Data Management has been proclaimed as a "big hit" for many years. Yet, many companies are still struggling to advance Data Management because their funding model doesn't allow an enterprise implementation. In our shop, with the current business climate, an enterprise implementation is almost impossible. A piecemeal approach doesn't move the needle. Money is scarce, the business is clamoring for new functionality, outsourcing has provided new hurdles, and globalization pressures for a quick fix. A combination of techniques of leadership, salesmanship, parenting, and negotiation will be presented. Each promises an impact—at home and at work. Even more important, these techniques will help you be a leader in your organization. Your past accomplishments are history. What you choose today is your future. Are you up to the challenge?

- Be a Data Management Leader.
- Win-Win—Negotiation for Success.
- Outsourcing—More Dirty Data Faster?
- Parenting the Data Management Child.
- Sarbanes-Oxley—Delivery into the Promised Land.

How Does a Business Analyst Work with the Data Architect and Database Administrator?



Barbara Carkenord
President
B2T Training, LLC

Level: Introductory

Many organizations are formalizing the role of the Business Analyst. The IIBA (International Institute of Business Analysis) is a new professional organization for business analysts. How does the emergence of this role impact data architects and database administrators? Business Analysts without any technology/data experience must be trained, not only about how to document data requirements, but to understand why data requirements are so important. Business analysts are much more valuable to the project team when they have learned how to gather, analyze, organize, and document data requirements. They need standard formats for documenting and communicating the data needs to the solution developers. Business analysts have outstanding communication and analytical skills that if

properly utilized increase the success of most application development projects.

- The emerging role of the Business Analyst
- How the Business Analyst fits with other project team roles
- Similarities and differences in skills of Business Analysts versus Data Architects
- Leveraging the skills of the Business Analyst
- Recommended templates for Business Analysts to document data requirements

A Data Administration Success Story at Elkay Manufacturing (or You Don't Know What You've Got Till It's Gone)



Diane Voyles
Senior Data Administrator
Elkay Manufacturing Company

Level: Business

Data Administration (DA) has a 20-year history of success at Elkay Manufacturing. From the start, DA developed and published standards, documentation and repeatable procedures. DA participates in key corporate and department initiatives and was heavily involved in choosing our ERP. Once chosen, DA was responsible for incorporating and converting Elkay's data. The foundation of good practices and established standards contributed to a smoother data conversion when we went live in 1999 and again when we upgraded in 2004. When Elkay established a data warehouse, DA participated in every aspect of the data warehouse and is responsible for all table loading. DA also provides data training at all levels within the organization. Most recently, DA, with our strong business background and system knowledge, was a valuable resource on Elkay's first Executive Dashboard project. This presentation discusses the involvement of DA in:

- Technology decisions and department initiatives
- Standards for tables & field naming
- Data warehouse table creation, loading and security
- Physical table changes
- Employees training on data warehouse
- How DA provides business knowledge of the "BIG PICTURE"

"Great conference. My first time and every session I attended was worthwhile."

Linda Alleman, Principal Financial Group

Enterprise Business Metadata—A Starting Point



Manish Malhotra
Senior Metadata Architect

Level: Advanced

Having successfully developed and deployed this application at a leading financial institute, Manish will share experiences and knowledge gained. He will discuss practical topics from the complete development cycle, including the logical data-model, system design, content addition and maintenance, reports and change management process.

- Business meta-data in terms of tracking essential business elements.
- Various characteristics that should be tracked for these elements (e.g. criticality, preferred physical aspects etc. with explanations).
- Roles associated with these elements (e.g. data stewards, data advocates, subject matter experts etc).
- Logical and physical data-models.
- The toughest challenge of all: Integrating this information with technical and reference metadata.
- How can this information help in compliance efforts like SOX and other industry standards?
- Business Metadata content change management (who should be involved and how to approach it in a large enterprise?).
- Can an application be built in-house for this and how?

Data Warehousing and Semantics: How Do They Play?



Neil Raden
Founder/Principal
Hired Brains

Rapidly emerging from the froth, business semantics is showing some bonafide potential. The application of semantic technology, such as the semantic web and ontology, is being woven into the fabric of computing and even data management. But so far, data warehousing seems to be oblivious to its potential.

A number of factors will cause that to change very rapidly. Enterprise Information Integration (EII) technology is maturing, causing the data warehouse's primacy to come into question. The biggest drawback of EII is its weak metadata component, which could be dramatically upgraded with semantics. But don't weep for the warehouse yet, the need for stable, integrated, historical data will be greater than ever when the current monolithic enterprise apps are reconfigured as smaller chunks of services, increasing the need for the services provided by a data warehouse. Whether this ultimately

ends up as a persistent repository (a data warehouse) or a virtual or hybrid structure is too early to tell. What business semantics offers over our current amalgam of metadata schemes is greater depth, consistency and, above all, the ability for machines to draw inferences from the metadata. This last ability is central to embedding analytics in composite applications.

In this session, you will learn how Business Semantics are already playing a role in the traditional territory of data warehousing and what to expect in the coming 12-24 months.

Build Your Own Reference Service DB for a Service-Oriented Architecture



Jonathon Storm
Database Admin., Data Architect
Port Townsend Paper Corporation

Laura Storm Information Scientist EARTHTUNES

Data/application integration, BI, SOA, and enterprise services are tools to get us the information we need in the way we want. One thing these tools all need is a set of master lists framed within the context of your disparate end-user groups. The Reference Service provides this nexus, a foundation for managing reference data in enterprise systems. Building/buying and implementing a reference service is a multi-disciplinary, multiple-year project that should be architected and incrementally phased in. While being a significant task, there are excellent, inexpensive tools that a small team (data architect, DB developer, SOA practitioner, and app developer) can use to build their own system—or assemble it from commercial off-the-shelf software components.

- Define & describe the Reference Service and its database
- Operational, BI, and DW integration uses of it
- Implementation methodology and architectural specification for integrating the DB into an SOA using an Enterprise Service Bus
- DB design elements—necessary objects, table types, design methods, templates
- Scope of work

Show Me the Numbers: Communicating Effectively with Charts



Stephen Few
Founder & Principal
Perceptual Edge

Level: Business

The ability to design effective visual displays of data is not intuitive; it requires a set of visual design skills that must be learned. Based on his recent book, *Show Me the Numbers: Designing Tables and Graphs to Enlighten*, Stephen Few will introduce the best practices for using charts to communicate data clearly and compellingly.

Most quantitative information is presented as tables and graphs. Unfortunately, most tables and graphs used in business today are poorly designed—often to the point of misinformation. Why? Because almost no one who produces them has been trained in effective table and graph design. You can become an exception to this norm. This presentation provides an introduction to table and graph design developed specifically for the needs of business. Following Stephen Few's clear precepts, communicated through examples of what works, what doesn't, and why, you will learn to design tables and graphs that present data clearly and drive your message home.

A1: Data Modeling Education and Practice: What's Being Used and What's Being Taught



Michael Chilton
Assistant Professor
Kansas State University

This presentation will present the results of a survey taken among educators and practitioners regarding data modeling concepts and tools. Two competing technologies were analyzed—entity relationship and object-oriented modeling. Arguments for the use of each will be presented. This session is for practitioners who would like to know what others are using and academics who would like to know whether their curriculum is meeting the needs of the industry.

Z5: Resources—the “New” Data Column

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

WEDNESDAY, APRIL 26, 2006

10:00 am – 11:00 am

How a Data Dictionary Spawned an Enterprise Model



Diane Rollinson
Data Modeler
University HealthSystem Consortium



Edward Bartholomew
Enterprise Data Administrator
University HealthSystem Consortium

The University HealthSystem Consortium (UHC), formed in 1984, is an alliance of academic health centers situated mainly in the United States. As a membership organization, UHC provides its 90 full members and 123 associate members with a variety of helpful resources aimed at improving performance levels in clinical, operational, and financial areas. UHC collects patient and benchmark data from its members as well as purchases complimentary health care data from third parties. In an effort to strengthen its ability to discover information from these disparate data sources, UHC embarked on an effort to document and relate the data by building a data dictionary. Using the concept of Domains and Subject Areas, UHC was able to conform silo-ed data into a Business Enterprise Model that allows users to discover, locate and relate disparate data across the enterprise allowing for more opportunistic and powerful analysis.

- No budget for tools or outside resources
- Data dictionary data model
- Data population approach
- Home-grown tool demo
- Marketing effort
- Maintenance effort

Enterprise Information Architecture at Nokia Using Universal Data Models: A Case Study



Len Silverston
President
Universal Data Models, LLC



Teemu Mattelmaki
Dir., Chief Information Architect
Nokia Corporation

Level: Introductory

Nokia developed and implemented an enterprise wide information architecture to move towards integrated information versus data silos. How did they do this and what were their challenges? How did they re-use common data models to leverage their efforts and where did they need to customize these “universal” models? This presentation will share experiences and techniques that Nokia used to facilitate shared information. For example, Nokia socialized the concepts of its enterprise model being “City Plans” and business subject areas being “City Area Plans” with the database designs being the “building blueprints.” A “think big-start small” approach was a core principle of this program.

- How to effectively apply “Universal Data Models” to a large organization such as Nokia
- Examples of models, with instance diagrams
- Architectural dimensions employed at Nokia and how they relate to each other
- What worked and what didn't work and why

Ebusiness—From Presence to Transformation: A Data Architecture Journey



James Fladger
Data Architect
Air Products

Behind every successful Ebusiness story is a Data Architecture story that often goes untold. This story is about the five year evolution of Ebusiness at Air Products. We'll uncover many data management principles as we progress from establishing a web presence to deploying strategic applications supporting supply chain optimization. We'll point out key architecture decisions made and their impact on reuse and extensibility. We'll visit the decision to migrate from an enterprise with 38 order entry systems to an enterprise supporting a growing 70% of our businesses on a single instance of SAP; focusing on how we leverage Ebusiness to drive SAP benefits. To frame the discussion, we'll also look at the genesis of DA involvement in our Ebusiness program and the strategies used to become key contributors to its success.

- Award-winning B2Bi architecture—reuse of common XML & SAP interfaces
- User Self Service applications—flexible DB designs, data sharing, stewardship
- Web extension of SAP for external agents—process, standards, security, SOA
- Web based, real-time application access—customization, data sourcing, SOA
- Project Work Process—inclusion strategy for DA involvement

Metadata Implements Your Enterprise Architecture



John Jones
Chief IT Architect
National Institute of Health

Level: Advanced

Enterprise Architecture (EA) is the conceptual design for the system which collects the common meta-data from across National Institute of Health (NIH) and establishes the rules and requirements for its reuse; this has been particularly challenging in the area of bio-informatics. Studying the meta-data in this area has revealed that much of the data is qualitative in nature, and that similar concepts are described in different parameter spaces. This leads to extremely difficult integration problems that can only be solved with complex transformation schemes enabled by the Common Warehouse Meta-model.

- Enterprise Architecture must direct the managed growth toward corporate data reuse
- Corporate-wide inventory of applications emphasizes the need for the enterprise focus
- Early achievements such as common login and consolidated email establish visibility
- Determine the primary corporate objects
- Define the meta-data for corporate objects, data sharing from applications and primary processes
- Establish a capability to capture and manage requirements outside as well as inside projects
- Develop an information technology repository.
- Establish a process for achieving consensus
- Develop a formal engineering approach for implementing the enterprise architecture

Automated Metadata Utilization in the BI Environment



Doug Stacey
Senior Manager
Allstate Insurance

Allstate Insurance has been a two-time recipient of the Wilshire Award including "Outstanding Data Warehouse Meta Data Implementation." This presentation will give an overview of the managed meta data environment at Allstate Insurance with a focus on the utilization of metadata in the business intelligence environment. The flow of data from point of capture, to a central repository, through an XMI-based bridge into the business intelligence tool, and ultimately to the end user, will be covered.

- Overview of Allstate's Managed Metadata Environment
- Input to the metadata repository
- Preparation of the metadata
- High level architecture
- Use of the metadata bridge and XMI
- Metadata interaction with BI tool
- Examples of end user experience

Wikipedia with an Attitude: Collecting and Using Business Semantics



Bonnie O'Neil
Senior Technical Consultant
Project Performance Corporation



Lowell Fryman
President
Enterprise Integration Solutions LLC

This session will expand on lessons learned from using Wikipedia in creative ways in a media company to both capture and deliver business semantics directly from business people. It also explores some interesting twists in governance, using a new version ("Governance Lite") to allow business people the maximum amount of flexibility to submit content but still have some sort of "authorized" content. The speakers will show how you can start a knowledge capture mechanism "on a shoestring" and slowly expand it to encompass more and more areas of usefulness to the business.

- The role of governance, and how to set up some governance but still allow users flexibility of expression
- * How to use PR to get users involved
- How to use Bonnie's Law: "whatever is lying around" to get the job done

Information Visualization for Discovery and Analysis



Stephen Few
Founder & Principal
Perceptual Edge

We live in a data-rich world. We spend billions of dollars every year on IT in an effort to create meaningful and actionable information, only to have the data collect in murky pools that grow ever larger by the day. While concentrating on the technology, we've forgotten the human skills that are needed to make sense of the data.

The mechanics of data analysis can take various forms, but information visualization can simultaneously reveal the big picture and the details, and does so in a way that is accessible to a broad audience, for it relies not on a special language but on something all but a few are able to do: to see. By encoding quantitative business information in visual form, our ability to think about it is dramatically extended. When data is visualized effectively and suddenly, there is what Joseph Berkson called an "interocular traumatic impact": a conclusion that hits us between the eyes.

A2: Metadata Research— Syntactic, Semantic, and Pragmatic Perspectives

Adir Even
Research Assistant
Boston University, School of Management

G. Shankaranarayanan
Assistant Professor
Boston University, School of Management

Level: Advanced

Metadata is argued to be a necessity of for the design, implementation and integration of systems in complex data management environments. However, practice experience shows that the implementation of metadata layers is often cumbersome, costly, and fails due to lack of understanding of these complexities. Our recent research explores different perspectives of metadata in an attempt to understand the challenges. In our presentation, we will introduce a few recent research efforts:

- Metadata literature offers a vague picture as for what metadata is and what system and usage functionalities it addresses. Our research provides a useful taxonomy of metadata components in the data warehousing environment, highlighting the complexities involved and providing a powerful framework for metadata examination.
- Metadata implementation challenges are discussed in the context of the metadata repository. We study factors that contribute to the challenge, and the drawbacks of commercial tools with providing the proper technological infrastructure for an integrated metadata solution.
- We further investigate the potential usefulness of metadata to business-users. Two relatively new metadata concepts—quality and process metadata—are empirically explored, and we demonstrate how the inclusion of such elements in end-user front-ends may improve the trust in decision making outcomes.

Z6: Metaframework Metamodels

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

"This year's conference exceeded my expectations and provided a breadth and depth of topics that was outstanding."

Carol Lehn, Pepsi Bottling Group

WEDNESDAY, APRIL 26, 2006

11:10 am – 12:10 pm

This Old Warehouse



Kevin Light
Managing Consultant/Senior
Portfolio Architect
Electronic Data Systems (EDS)

Data warehouse renovation/revitalization requires a methodical approach. Successful data warehouse implementations grow over time in response to increased demands for information by the business constituencies they support. Meeting the demands of continuous enhancement and additions to a production warehouse on a demanding schedule can force warehouse support teams to follow less than optimal procedures.

A large Canadian bank has had a data warehouse in place since 1996. As a result of continuous change, the warehouse architecture began to collapse under its own weight, burdened with an inefficient database and ETL architecture design.

This case study will examine the following:

- The approach and method taken to data warehouse renovation
- The challenges that needed to be overcome in order to execute the renovations
- The end result of the first phase of the initiative
- Lessons learned from the exercise
- What to do and what to avoid when renovating data warehouses

FEA DRM in Motion: Pioneering the DRM Implementation in the Federal Government



Suzanne Acar
Senior Enterprise Data Architect
The Department of the Interior

Federal agencies are mandated to leverage IT investments to transform the government to be citizen-centered and results-oriented. The Federal Enterprise Architecture (FEA) Data Reference Model (DRM) provides a federated structure for agencies intended to identify data redundancies, harmonize data requirements and facilitate data reuse and exchange across the Federal government. The Department of the Interior (DOI) was the first federal cabinet agency to pilot the implementation of the FEA DRM structure. DOI's pioneering approach uses a "top-down" and "bottom-up" analysis driven by enterprise architecture modernization blueprints and guided by enterprise DRM governance. DOI's success is remarkable. With four blueprints completed, DOI identified approximately 100 redundant systems to be retired. DOI received the highest OMB EA scorecard rating as well as numerous other prestigious honors.

- Federal Enterprise Architecture Framework
- DOI's FEA DRM Implementation Strategy
- Data Reuse and Exchange Approach
- DOI's Success Stories and Results

The Future: eXtreme Data Warehousing



Stephen Brobst
Chief Technology Officer
Teradata, a division of NCR



Richard Hackathorn
President
Bolder Technologies

Level: Advanced

What is the future of business intelligence? What are the application possibilities for data warehouses with extreme service levels in performance, data freshness, and availability? How can extreme data warehousing be used to enable new business models across a variety of industries? This session has as its goal to get you to think "out of the box" about advanced applications of business intelligence.

The session will address the following:

- Cover futuristic case studies that are closer than you may initially think
- Explore intangible business issues related to privacy, organizational change, data quality and liability, data ownership and control, data accessibility and more.
- Discuss breakthrough customer experiences that result from these applications
- Illustrate new business models across a variety of industries
- Describe application possibilities with extreme service levels in performance, data freshness and availability

Metadata Web Services for Performance



Dave Beulke
Principal
Syspedia

Web Services and service oriented architecture (SOA) environments are the latest solution for deploying diverse systems and internet processes. Since anything can call these web services, metadata management continues to be more of a challenge. The latest way to manage your metadata is through the master data management that helps you understand the stewardship, format and data lineage possibilities for your corporate data resources.

This presentation will take you through the process of master data management and highlight how it helped a company overnight realize a 14% processing performance improvement and helped reconcile their legacy and SOA application data assets through metadata management web services.

Building Near Realtime Hybrid Data Management Systems



Brahmaiah Jarugumilli
Sr. Enterprise Architect
GE-Consumer Finance

Level: Advanced

The polarized data warehousing community continues to experiment with hybrid systems that are a cross between traditional entity-relationship and dimensional models. Meanwhile, the world is moving forward on newer nuances of hybridization that are aimed at transforming and presenting information digests of transactional data at all levels of consumption and visualization at close-to realtime lag. This presentation demonstrates a successful terabyte+ size real world system that is at once an OLTP-DSS hybrid and also offers some techniques to fluently and seamlessly push data into multiple tiers of the OLAP/Scorecard systems.

XML Design for Form and Function



Uche Ogbuji
CEO
Fourthought, Inc.

Level: Introductory

Collections of XML documents are the most important source of rich semantic data right now. Semantic transparency is the ability for machines to properly interpret the content of documents (similar to "machine readability"). There are techniques in development for ensuring semantic transparency of XML documents, but the foundation for semantic transparency is good XML vocabulary design. The XML industry is dominated by healthy competition between various standards and conventions, but without basic quality in the design of XML documents, none of the downstream considerations is of much importance. Regardless of schema language, query and transform technology, poorly-designed XML leads to systems that are difficult and expensive to maintain, and complicates the automation of the XML processing. This session will cover effective XML design, and how effective XML brings business benefits through semantic transparency.

- How XML data modeling derives from and differs from traditional data modeling
- Principles of XML design
- Introduction to semantic transparency

- Business benefits of semantic transparency
- Recommended techniques for integrating XML into applications

Best Practices: The BMO Story (Part 1)—Developing and Implementing an Enterprise-wide Information Management Program



Greg Keeling
Sr. Information Mgmt. Consultant
BMO Financial Group



Wayne Harrison
Sr. Information Mgmt. Consultant
BMO Financial Group

The BMO Financial Group views information as a strategic asset and thus it should be managed with the same attention as other resources such as human and capital assets. Over the past year an information management initiative has been underway to transform a board-level policy into implementable standards, practices and processes. The information management efforts include special concentrations on governance and information stewardship.

This session will focus various components of the information management program including:

- The importance of governance
- Key Roles in IM: accountabilities and information stewardship
- IM Standards: Bringing the IM Life-cycle to life
- IM Project Consulting: The challenge of integrating IM practices into process
- Change Management: Communication and the creation of an IM mind-set

A3: New Research and Thinking in Advancing Data Quality Initiatives



Frank Dravis
V.P., Information Quality
Firstlogic

Level: Advanced

Observation and empirical research into the goals, problems and needs of hundreds organizations over recent years has revealed an enormous wealth of information about the processes that organizations follow when attempting to solve data integrity issues. Clear patterns of success are apparent from this research. Essentially, there are three distinct stages to the resolution of the problem:

- Awareness/identification of the business problem

- Quantifying the problem
- Implement a solution which addresses both business and technical issues

Each phase of this cycle also has three sub-phases that more clearly illustrate the processes involved. Real-world evidence from companies of various sizes, and in a wide range of industries, strongly supports the success of a formalized management methodology based on this 3/3 structure. In this presentation, the speaker will present the findings of this original research and a formalized solution cycle derived from that same research. At least two specific case examples will be illustrated, including discussion of the notion of "Round-tripping", wherein once an organization has completed one data quality project, they are apt to reapply the proven, successful process to other data quality problems with the likelihood even more improved results (for example, first applied in a marketing division, then repeated in an accounting department, then a sales group, etc.).

Z7: Integration for Implementation

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

WEDNESDAY, APRIL 26, 2006

1:15 pm – 2:15 pm

Data Warehousing—A Case Study: Finding Success After Failure



Theresa Fletcher
Data Warehouse Developer
PeaceHealth

This presentation focuses on how we found measurable success at PeaceHealth after what might have appeared to be failures in the areas of standards, metadata, data modeling, and the overall process of the Data Warehouse project flow. We look at why having a large vision is important, but what it takes to make progress. Specifically why the vision of an Information Directory was too large, and how we were able to do a phased approach.

- How we incorporated areas from the original vision, such as capturing metrics, in phases
- Why standards weren't working and how we have now achieved success (and reasons why)
- How we evolved with a project template
- Why we created a "BRD" to address each Data Warehouse project and what it looks like
- How we are using data modeling today
- How a governing body manages the work of the warehouse team and why this is so successful
- How we are making Data Warehousing work

It's All About the Data



Dan Paolini
Director, Data Mgmt. Services
State of NJ - OIT

Level: Advanced

(Why the Lack of Leadership is Diminishing the Data Management Profession)

Data Administration, Data Architecture, Data Management, Data Management Association, Data Processing, Data Quality...What do all of these things have in common? Their first name is "Data", yet all are being "re-branded" with the first name of "Information." Isn't that a good thing? After all, isn't Information (data in context) that which our organizations want and need? In a word, No. Our organizations want "wisdom"—which comes from the application of experience to knowledge. We get knowledge from information in context. We get information from data in context. Information, and even knowledge, are downstream "improved" products of Data. If Data is not defined and managed properly, the downstream products are suspect. Therefore, our organizations need quality data.

This presentation will discuss the dilution of data management, both by the focus on Information over Data, and by the fracturing of the profession into special interest groups. Most importantly, it will identify what you can do about it to strengthen yourself and the profession.

From Survivor to Activist—A Case Study of Data Management at the California Department of Education

Sonya Edwards
Education Administrator
California Dept. of Education

Level: Data Management - Introductory

Since April 2002, the California Department of Education (CDE) has been implementing the recommendations of a study of the department's data management practices. The main effort has been on developing a Data Resource Guide (a catalog of CDE's existing data resource) and common data architecture. With over 2,000 employees, 138 data collections, over 20 divisions and a decentralized approach to data collections, this has been a challenging effort. This effort has brought national recognition of the California Department of Education as an activist in the area of data management. Topics will include the following:

- The Importance of Systems Thinking
- Critical Success Factors
- Indicators of Success
- Building a Winning Team
- Major Steps of Building Common Data Architecture
- Lessons Learned

Managing Oracle's Metadata— What Your DBA Doesn't Want You to Know



James F. Koopmann
Founder
Pine Horse, Inc.

Database Management is a black art? Isn't it?

We ask our database management staff to fulfill many tasks. Most of these are maintaining not only database's metadata but the migration of objects and data across a multitude of environments. After a task has been given we sit, wonder, and pray for the best. Not ever knowing all that is involved, the time required, or the "hoops" our staff must leap through.

This session will visit this black art form, give you a birds eye view from an administrator that has been there and has an eye for management and what they need to know.

The nature of this presentation is both technical and managerial, mostly using examples from Oracle that highlight the ease of metadata management. So, if you are on the management side of the house or a database practitioner, come spark up some interesting discussion on the following:

- How database definitions are born
- How database requests are fulfilled
- Developing Life changing procedures for metadata management

Vocabularies: Ontologies Specialized for Data Architecture



Dave Hollander
Chief Technology Officer
Contivo, Inc.

Interoperability of business systems is the principle goal of many of today's computing technologies: EAI, EII, ETL, Web Services, SOA and the Semantic Web. While budgets are largely focused on systems to move messages, the real impediment to interoperability is semantics—analysts estimate semantics may account for up to 95% of the effort. Vocabularies are well suited to address this imbalance. Vocabularies help teams understand the data requirements of application interfaces and message standards. Furthermore, vocabulary driven systems can deliver technical metadata to reconcile data semantics that can be directly used by business applications and the systems that provide connectivity.

For example, many systems and architectures today rely on XML Schemas as the metadata format to describe the vocabulary used by a system or in a message standard. Yet XML Schemas obscure the principles that underlie the vocabulary they are describing, resulting in incompatibilities. With vocabularies, novices and experts alike can create

schemas to describe their data requirements and understand schemas produced by others. This talk explores how vocabularies specialize ontologies to address data architecture and system interoperability. They borrow from linguistics, XML Schemas and modeling to create an easy-to-use stable framework for understanding and accommodating disparate data requirements.

Using Metadata For Semantic Interoperability: caCORE and the NCI's Cancer Biomedical Informatics Grid (caBIG)



George Komatsoulis
Associate Director
Biomedical Informatics NCI Center
for Bioinformatics, NIH



Kathleen Gundry
Technical Project Lead
SAIC

Tommie Curtis
Metadata/Data Standards Analyst
SAIC

Level: Advanced

The National Cancer Institute's (NCI) Cancer Biomedical Informatics Grid (caBIG) is a program designed to support the creation and use of a syntactically and semantically interoperable data and analytical service Grid characterized by federated development. caBIG developers will leverage the NCICB caCORE infrastructure, comprised of open source tools and business processes, to achieve interoperability through the use of semantically equivalent data elements describing object-oriented data systems. These data elements and the object models are supported by controlled terminology and are programmatically accessible from an ISO 11179 compliant metadata registry. Recognizing that compatibility requires both technology and process, caBIG established a Vocabularies and Common Data Elements (VCDE) workspace staffed by volunteers and funded participants responsible for the review and coordination of information models, vocabulary and data element usage, and data standards. The VCDE workspace is key to the ongoing metadata management and harmonization process within the NCI and caBIG.

**“Refreshing to talk with others
that share the same interest
in data management.”**

Jim Mercurio, US Dept. of Veterans
Affairs

Best Practices: The BMO Story (Part 2)—Information Classification, Security, Privacy and Metadata Challenges



Wayne Harrison
Sr. Information Mgmt. Consultant
BMO Financial Group



Greg Keeling
Sr. Information Mgmt. Consultant
BMO Financial Group

Over the past couple of years a Classification Framework has been developed and implemented that supports the protection of and privacy of information. More efforts are being directed to include other classification domains such as retention and quality, and to inventory all information using such classifications. Our Corporate Metadata Repository acts as the book of reference for all classification and business metadata relevant to sustain the Information Management Program. This session will focus on Metadata Management and Classification components.

- Classification Domains (Security, Privacy and others)
- Information Life-cycle
- Information Inventory

A4: Teaching Data Management



Larry Burns
Database Consultant
Paccar, Inc.

As more and more people are starting to question traditional approaches to data management, it becomes more and more imperative to find better ways of making the business case for data management, of understanding and responding to objections and concerns about data management, and of communicating an approach to data management that is rational, effective, and (above all) helpful. For many years, Larry Burns has taught and advocated an approach to data management that combines the most effective aspects of stakeholder economics, enterprise architecture, traditional data management, a collaborative and iterative (i.e., "agile") process approach, and a view of data management as being both a steward of enterprise data resources and a provider of data services that promote business value.

Z8: Generating Applications from Models

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

WEDNESDAY, APRIL 26, 2006

5:30 pm – 6:30 pm

Advanced Methodologies of Implementing Data Governance



Martha Dember
Business Intelligence and Data Management Practice Lead
CIBER, Inc.



William Follmer
Practice Manager, Enterprise Integration and Data Warehousing Services
CIBER, Inc.

There are seven layers of the data governance maturity model. This presentation describes the characteristics of those levels and the benefits an organization receives in attaining each of these levels. A pragmatic approach is then given as to how an organization may embark upon attaining these levels depending upon where they currently are with their governance and stewardship programs. In conclusion, the presentation will review an assessment checklist of how an organization can determine their readiness to embrace a governance program, if they have not already begun a stewardship program, or determine if they are ready to move to the next level of maturity if stewardship is already in place.

The Latest & Greatest in DBMS Features



Craig S. Mullins
Director of Product Strategy
Embarcadero Technologies

Database management systems are changing very rapidly, with new versions being released by the major vendors on a regular basis. As such, it can be difficult to keep up-to-date on the newer features that have been added. This presentation will examine some of the most interesting new features of the Big Three DBMSs (DB2, Oracle, and SQL Server).

Rochade SIG

Bill Modica
HSBC Data Centre of Excellence, Group Metadata Repository Mgr.
HSBC

Users of the ASG-Rochade repository will get together to network with each other and ASG during the conference. The session will help start discussions on open issues, best practices, etc. that will be more fully discussed as part of the formal day and a half NARUG event on Thursday-Friday (following the conference).

Pursuing a Data-Focused Career—A Fresh Look



Ted Kowalski
Data Architect
Shell Oil Products

Level: Introductory

This presentation tries to help the data professional in selecting a specialty, defining job activities, offering survival skills, and giving tips on increasing career enjoyment.

The speaker reviews the scope of a data professional's work, including modeling, analysis, data cleansing and profiling, interfaces, quality assurance, measurement, and exploration. Attendees will explore success—both defining it and practicing it. Some of the means to success are: (1) Exerting your authority and power through “data knowledge”, (2) Seeing how you define yourself versus how others define you, and (3) Exploring the “hot” areas of data architecture. Finally, a section on “selling yourself” examines the data architect's style in writing resumes, interviewing, and attending meetings.

A highlight of the session is that each participant will come away with a Data Specialist's Profile, a personalized map of the route and means that each will take to achieve his or her goal in the industry.

A5: Expressing, Validating, and Implementing Advanced Constraints in Data Models



Terry Halpin
Distinguished Professor and Vice President (Conceptual Modeling)
Neumont University

This presentation discusses issues arising from the pragmatic need to model complex constraints found in various business domains. Many of these constraints play a central role in the semantics of business vocabulary and rules submission recently adopted for finalization with the Object Management Group. The constraints are illustrated using practical examples, and various design patterns and heuristics are explored to provide solutions that can be reused and adapted as needed for specific domains. To cater for different preferences in modeling approaches, the examples will be portrayed using Object-Role Modeling, Entity Relationship, and UML notations, and well as textual languages for rule verbalization.

- How to distinguish and implement constraints based on their modality (alethic or deontic)
- How to validate constraints with domain experts using advanced verbalization patterns
- How to understand the precise semantics of advanced constraints by exploiting logical foundations
- How to adequately capture complex constraints involving conceptual joins

THURSDAY, APRIL 27, 2006

8:30 am - 9:30 am

The Rodney Dangerfield of Data Architecture—Data Profiling, It Gets No Respect



Sandy Georgas-Gait
Enterprise Data Architect
Laidlaw Education Services

After working in the data management profession for 19 years, I didn't think there were too many new tricks of the trade, until I recently discovered one, i.e. Data Profiling, but not as a data quality tool, as a data architecture tool. I have learned how to use data profiling to write metadata, design databases including data warehouses, develop data mapping documents, understand the databases I inherit, and to reduce the time I need to develop these artifacts. I haven't seen many Data Architects take advantage of data profiling in this way, and so this presentation will explain how to profile your data and apply this knowledge to database design, and not just to data quality analysis.

- How to Profile Data
- Applying Data Profiling to metadata development
- Applying Data Profiling to database design
- Applying Data Profiling to data conversions and data mappings
- Applying Data Profiling to interpreting inherited databases including packages
- Making the boss and project manager happy by reducing time to develop data architecture deliverables by using data profiling

The IT Value Chain Enabled: Data and Process Perspectives



Charles Betz
Enterprise Architect
Wells Fargo

Level: Advanced

Does enterprise IT matter? Enterprise information technology is under increasing pressure to demonstrate value, transparency, and responsiveness. New disciplines such as IT Governance, Portfolio Management, and Service Management are evolving in response. However, the IT capability in most large organizations is still partitioned into high-walled functional silos. Enterprise modeling and process improvement techniques have been used throughout all aspects of business, but the weakest area of their application has been enterprise IT itself. In particular, an end to end view of IT as an integrated value chain is lacking. Based on the presenter's in-progress book, metadata and process modeling techniques will be used to clarify the new IT process frameworks, and a coherent IT supply

chain will be presented, providing unique insights into enabling the cross-functional IT value chain.

- A conceptual data/metadata model for enabling IT governance
- Change and configuration management as key process areas
- Critical interaction points between IT functions
- Data and metadata management in an IT governance context
- System architectures and integration patterns for enabling the IT value chain

The Future of Data Management



R. Todd Stephens
Dir. of Metadata Services Group
BellSouth

Level: Introductory

Do you currently perform the same job functions you did 10-15 years ago? More than likely, you are like all of us in the fact that our job has transformed itself right along side of the advancements in technology. While no one can be certain what the future holds for data management, we can be sure of one thing: it won't look like today's environment. This session will review where we have been and where we are going as information technology professionals, specifically in the core areas under the data management umbrella. Data management will require a new set of skills that most of us are woefully unprepared to provide. We will examine a collection of trends in the world of technology and discuss the impact to our jobs whether they are in data warehousing, business intelligence, data modeling or metadata. The session will end by addressing specific action items for you to take today in order to remain a valuable asset in the world of information technology. If you attend this session then be prepared to walk away questioning your current development plan. As Eric General Eric Shinseki informs us: "If you don't like change, you're going to like irrelevance even less."

Strategies for the Reluctants: Enabling Metadata Development



Eric Landis
Consultant
Natural Resources Information Mgmt.

Sharon Shin
Metadata Coordinator
Federal Geographic Data Committee Secretariat

Level: Business

This session reports on a 2005 study commissioned by the Federal Geographic Data Committee of the US Geological Survey that identifies obstacles to metadata development and strategies for overcoming those obstacles. In all, 26 obstacles were identified spanning issues of organization,

education, processes, tools and standards. Sixteen strategies are offered for private industry and public organizations looking to break the metadata reluctance barrier. Three case studies of successful metadata development will be presented. Each organization maintains different levels of expertise and resources, from a single-person program to a \$3.3 million dollar data management operation. Common strategies across the case studies will be outlined.

Semantics in Data Warehousing and Integration:

Associative Data Modeling & ISO Standards



Andrew Davis
Product Manager
Kalido, Inc.

"The information systems and interfaces often cost more than they should, to build, operate, and maintain. They may also constrain the business rather than support it. A major cause is that the quality of the data models implemented in systems and interfaces is poor." This was the findings of the oil company Shell during a detailed investigation of the effectiveness of IT spend. This work resulted in a series of initiatives including the development of 3 ISO standards, and a prototype software solution that demonstrated a more business oriented, flexible approach to data modeling was both possible, and viable. Andrew Davis from Kalido will explain the underpinning theory behind ISO 18876 and 15926, and how they can be used to critique and even design flexible data models that are flexible in the face of business change.

Supply Chain Management Using English Business Rules Over SQL



Adrian Walker
CTO
Reengineering



Ted Kowalski
Shell Oil Products

In the oil industry, a competitive supply chain plan depends on knowledge of many factors, including business policy knowledge, and inventory facts in SQL databases. Both the knowledge and the facts can change rapidly. This makes it difficult to write conventional application programs and SQL queries that can produce supply chain plans to meet demand profitably. We show how the knowledge needed to satisfy a demand can be written down in the form of business rules in open vocabulary, executable English. We use some new technology to execute the rules directly as though they

were a program. The technology automatically generates and runs SQL queries to produce a suggested supply chain solution. Even in the simple example in the presentation, the generated SQL queries are too complex for a programmer to write reliably. However, it is easy to change the business rules to specify a new policy, and the generated SQL then changes automatically. A feature of the technology is that a supply chain solution can be explained automatically, at the business level, in hypertexted English.

A6: A Proposal for Developing Undergrad and Graduate Model Curricula for Data Management in Synergy with the Information Systems Model Curricula

Herbert E. Longenecker
Professor of Computer and Information Sciences
University of South Alabama



Deborah Henderson
Chair
DAMA-I Curriculum Committee



Patricia Cupoli
Member
DAMA-I Curriculum Committee



Anne Marie Smith
Member
DAMA-I Curriculum Committee

The DAMA education committee has built a framework for the DAMA Model Curriculum for Data Resource Management. They have addressed the Modeling, Use and Administrations of Data and have addressed the nature of data management (DM) professionals from entry through advance levels. In this paper we address the deployment of this model for undergraduate and graduate programs and explore the far reaching consequences of this mission. We will present a model for enhancing undergraduate IS education programs, and for developing differentiation of DM from other IS disciplines during elective and advanced portions of graduate Information Systems programs, particularly in data quality and data warehousing. This model also allows for research into new data technologies, principles and practices. Also, we will present a detailed and updated skill analysis and assessment of DM programs.

Z9: Are you Programming Primitives?

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

THURSDAY, APRIL 27, 2006

9:50 am – 10:50 am

Who Said DMO?



Alex Kerezy
Data Architect
Nationwide Insurance

Level: Advanced

This presentation discusses key aspects of a data management organization or DMO. It presents ideas on organizational structure and roles and responsibilities within a DMO. Guidelines are provided to help assure success, and finally, the presentation points out what DMO managers should avoid.

A Matter of Corporate Survival: A Proven Pragmatic Approach of Aligning Data Architecture, Information Architecture, and BI Support with Business Strategy, Vision, and Direction



Osman Tekes
Consultant
ROTEK dot ca

Level: Advanced

This session is for executives, business people, change agents, architects, decision makers of all levels, and information providers for those decision makers.

If information consumers are not happy with the information they receive, and as an organization, if you would like to leave the days of non-aligned and unrelated piecemeal reports or information bits in the past; you may like to attend this session.

This presentation will share secrets of a proven pragmatic approach based on successful real life engagements where better Business Information delivery practices are implemented.

With the intent of improving effectiveness and efficiency, the components of the roadmap provide paths cascading from Business Strategy, Vision, and Direction; and then address how to align BI Architecture and Performance Management Framework, Information Architecture, Data Architecture, IT and Infrastructure Architectures with each other, and most importantly, with the Business Strategy, Vision and Direction.

We will review the roadmap and talk about how it is tailored to specific needs of each organization.

After the definition activities, each component of the roadmap is implemented to affect practice change, improve the capabilities of the organization, and increase the level of cooperation between business and BI delivery sides.

Business Process and Data Modeling Integration in a Project for Stabilization and Rehabilitation



Christine Hawkinson
Data Architect, Systems Coord.
Office G&B Solutions, Inc.,
US DOI Bureau of Land Mgmt.



Barb Kett
Data Architect, Systems Coord.
Office
US DOI Bureau of Land Mgmt.

This presentation will cover a project that was designated under the Bureau's Enterprise Architecture. It will include the methodology and teamwork used to develop the process and data models, the tool that was used for both models, issues that resulted and how they were resolved, and how the resulting data model will be incorporated into the BLM Data Reference Model. The project first conducted Business Process Re-Design (BPR, Transformation) sessions, diagramming the AS-IS and TO-BE process. The data team then utilized the information from the BPR sessions to develop a draft conceptual data model. The transition was then made to data sessions, conducted with the business SMEs, where the business data model was developed.

Connection and Dispersion: Metadata Driven Taxonomy Development



Barbara Nichols
President
Metaview360, Inc.

Many of the "leading edge" technologies from our past have occurred as the result of corresponding technological breakthroughs or products: relational databases, artificial intelligence, object-orientation, portals, XML, web-services, semantic modeling—It is tempting to say "the whole world has changed" when the new stuff is introduced. This could occur today with the explosion of taxonomies, ontologies, and the search for semantic integration at multiple levels within and outside corporate organizations.

Are the semantics and application of taxonomies, ontologies and the like vastly different in principle, standards and models from those of the data management discipline? How do they connect? Where are the similarities and the differences? This presentation (or workshop, or tutorial) will examine these questions and draw connections among the common elements. Among other things, it will explore data modeling, standard data naming and metadata management as they contribute to the development of taxonomies and ontologies in the Brave New World of semantic integration.

Master Data Management & Enterprise Data Warehouse—A Case Study of Implementing an Enterprise Data Hub

Michael Gottwald
Information Architect
Ford Motor Company

This presentation features a case study of the successful implementation of an Enterprise Data Hub (master data and a data warehouse) as it was used to integrate and share data across six divisions of a major pharmaceutical company operating in over 80 countries. The discussion will focus on the real world experience of implementing an effective enterprise-wide data management program in a company with little prior support for enterprise data sharing that was undergoing significant change and facing challenges on many fronts. The topics addressed include the following:

- How and why the data hub became a key enabler of the company's business strategy
- Data architecture and services needed for success
- How the data hub was governed, funded and managed
- Critical roles and responsibilities
- Benefits and critical success factors
- Key lessons learned

A7: 450 Data Modelers Can't Be Wrong



Graeme Simsion
Senior Fellow
University of Melbourne

Over the last four years Graeme Simsion has been undertaking research at the University of Melbourne, looking at data modeling—and data modelers. He has interviewed, surveyed or tested over four hundred practitioners in the US, UK, Scandinavia, and Australia, looking at how they approach modeling, what they believe, and how their solutions compare. Throughout, he has kept the focus on practical issues, while maintaining a level of rigor appropriate to academic research. The results have strong practical implications. Graeme is uniquely placed to answer them from a background that now combines research and practice.

Z10: The Week that Was

This session is part of the Zachman Framework Track. Please see pages 20-21 for a description of this session.

THURSDAY, APRIL 27, 2006

2:00 pm – 5:00 pm

S1: Making DM Relevant to the Enterprise and Keeping Your Job



Michael Scofield
Principal
Scofield Data Consulting

Data management must be visible and relevant to the enterprise and its executives for it to survive. The temptation to cut DM staff or outsource it is far too strong in some organizations. Executives generally don't understand data architecture (a severe abstraction) nor metadata. They may accept data warehousing (when the project has been a success). How do you make data management relevant?

We will review a 5-tier model of IT to show the widening range of functions (and personality types) involved in IT. We will show how data architecture fits in and continues to be a crucial aspect of the business. Data architecture compatibility thus becomes a key criteria for the evaluation and selection of business software applications (such as ERP packages). Often these decisions are made at too high a level, and DM is consulted too late.

We will look at ways to use DM (and the data warehouse) to "stay engaged and immersed" in the life of the enterprise. Introverts are at risk. You must be out there, listening to what decisions and issues are confronting the enterprise, and offering direct and immediate solutions—not merely "back office" support for the DBA and programming projects. We will look at some simple techniques in exploiting metadata and data warehousing to make the DM function irreplaceable.

Communicating the values, insights, and understanding of data management to the rest of the organization is probably one of the most important aspects of your job. Persuading them to take seriously what you can do and are doing for them—it's an ongoing project that you have to be committed to. This session provides tips and skills that every data professional will find valuable.

Making DM relevant to the enterprise

- Creating value for the organization and giving DM visibility
- The entrepreneurial data manager
- Making the abstraction of data architecture visible to nearsighted folk
- Realizing value from data architecture

Value-adding DM functions

- Data asset inventory
- ERP and application package analysis
- Data quality assessment
- Data integration
- Spontaneous data mining and reporting

Communicating the value of DM to the enterprise

- Building on your business knowledge.
- Long-term vs. short term vision

- Differentiating DM from technology management

■ **Michael Scofield** is a popular speaker and consultant in data quality and data management. He has held numerous posts in data architecture, data quality, and data management. He has lectured over 120 times to a wide variety of professional and community audiences, including over 15 DAMA chapters, numerous DBMS user groups, European Metadata Conferences, TDWI conferences, Quality Assurance Assn. chapters, Institute for Internal auditors, and over 15 other professional groups.

His articles on data architecture and data quality techniques have been published in Information Week, IBI System Journal, Data Management Review, the Cutter IT Journal, and the Database Newsletter. He also writes humor, published in the Los Angeles Times and other journals.

S2: How to Build a Data Warehouse in a Day



Dan Paolini
Director, Data Mgmt. Services
State of NJ - OIT

This presentation is for business management or technical staff struggling with the concepts of data warehousing. No, we won't really build a data warehouse in a day, but we will cover the essential ingredients necessary to develop a foundational understanding of this discipline.

Using a simple but representative case study, we will discuss the following:

- Understanding Data Warehouse Architecture
- User-Driven Analysis and Design
- Modeling and Building the Database
- ETL—The Secret of Successful Data Warehouses
- Business Intelligence—More than Just Reports

Attendees will be able to see a data warehouse project develop while being presented with common problems, opportunities, pitfalls, and objectives. Attendees will have the opportunity to interact and ask questions specific to their current or planned data warehousing environment. The tutorial will cover different technology categories applicable to data warehousing, but specific tools or vendors will not be featured.

■ **Dan Paolini** is the State of New Jersey's Director of Data Management Services and first Information Architect. Before returning to State employment, he co-founded and led a successful database consulting and training firm for six years. He has also served as the Chief Technology Officer for a public school district and for a State educational institution.

He has presented eight keynotes and more than fifty technical papers at more than twenty conferences in North America and Europe on many diverse topics. Dan was a contributing editor for a monthly database magazine for three years as well as the technical editor for three database books.

Dan is the Vice President for Standards for the DAMA International Foundation. He also serves as a moderator for the Data Architecture Professional Group.

S3: How to Design, Build and Use an Ontology—A Guide for Data Management Professionals



Dave McComb
Principal
Semantic Arts



Simon Robe
Principal
Semantic Arts

An ontology is a formal description of the meaning of the information stored in a system. It resembles a conceptual model, but goes much beyond a conceptual model in that the formal definitions allow the system to infer class membership based on properties. Additionally, inference engines, running on ontologies, allow users to extract and integrate information stored in distributed systems.

This workshop, which will contain a number of live demos, will cover practical issues in employing ontologies. Participants will:

- Gain an understanding of what an ontology is and what it can be used for. How does an ontology compare to familiar data management concepts and models?
- Understand how representing information in an ontology goes beyond a conceptual model or a simple taxonomy
- Understand the difference between frame based/declarative classes and description logic based/derivable classes.
- Understand the difference between open world and closed world models.
- Understand the basic principles for designing Ontologies for corporate applications.

The instructors will particularly compare ontologies to the experience of data management professionals, so that the concepts can be better understood.

■ **Dave McComb** and **Simon Robe** are principals with Semantic Arts, a firm specializing in Semantic Technology and Service Oriented Architecture. Dave is the author of *Semantics in Business Systems*.

CONFERENCE POLICIES

Payment Policy: All registration fees must be paid in US Dollars. Full payment must be made prior to attendance at the conference. It is strict policy that only U.S. government employees may submit training authorization forms in lieu of prepayment. The Federal ID Number for Wilshire Conferences, Inc. is 95-4755805. Checks must be made payable to Wilshire Conferences, Inc.

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Cancellation Policy: Should you need to cancel for any reason, please notify us in writing. Substitutions may be made at any time. Cancellations received by March 23, 2006 will be subject to a \$50 cancellation charge. Cancellations received between March 24 and April 6 are subject to a \$250 cancellation charge. Cancellations on or after April 7 will not be entitled to a credit or refund. Confirmed registrants who do not attend and do not cancel are liable for the entire registration fee. PLEASE NOTE: Non-payment does not constitute cancellation.

Schedule: While every effort will be made to maintain the schedule exactly as represented in this brochure, we reserve the right to make changes and substitutions as needed. Visit www.WilshireConferences.com/MD2006 for news and updates.

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Solicitation: Solicitation at the event by anyone other than exhibitors is strictly prohibited.

HOTEL RESERVATIONS

The conference takes place at the Hyatt Regency Denver at Colorado Convention Center. A group block has been made for a specified number of sleeping rooms at the Hyatt. A discounted rate of \$149 (single) or \$169 (double) is available for conference participants until March 22, 2006, or until the room block sells out, so we recommend that you make your reservation early.

Please contact the hotel directly to make your reservation, 888-421-1442 and request the **Meta-Data/DAMA** conference rate. If you prefer to make your reservation online, there is a link to the hotel registration system on the conference web site (www.WilshireConferences.com/MD2006).

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Significant airfare discounts to Denver from U.S. and Canadian cities can be booked through Journeys Abroad, the official conference travel agent. Call 1-800-448-8150 or 310-446-4811 between 9:00 am and 5:00 pm Pacific Time, Monday through Friday, and mention that you are attending the Meta-Data/DAMA Conference. Discount fares are subject to availability, and certain conditions apply.

SPECIAL 20% DISCOUNT FOR GROUPS OF 5 OR MORE!

To qualify, the group members must be with the same organization and register at the same time. If registering a group, please call 310-477-4475, x100 for instructions.

Join in the DM-DISCUSSION!

DM-DISCUSS is a moderated discussion list for anyone interested in Data Management issues. Over 1000 members of the Data Management community subscribe to DM-DISCUSS for timely conversations on a wide variety of topics. You can join in too, by going to the www.wilshireconferences.com (it's a link at the bottom of the page) or by sending an email to: dm-discuss-subscribe@yahoo.com

ABOUT THE EVENT

The DAMA International Symposium and Wilshire Meta-Data Conference is a joint venture between DAMA International and Wilshire Conferences, a highly successful partnership now in its tenth year. A committee of DAMA members develops the DAMA side of the agenda, while Wilshire Conferences develops the Meta-Data agenda. DAMA and Wilshire work closely to ensure that the combined event is cohesive and seamless for our attendees. The combined event attracts approximately 1000 attendees, making it the world's largest vendor-neutral data management conference.

ABOUT THE ORGANIZERS



DAMA International is a not-for-profit, vendor-independent association of technical and business professionals dedicated to advancing the concepts and practices of information resource management (IRM) and data resource management (DRM). The association is comprised of local and regional chapters around the world. DAMA's mission is to promote the understanding, development and practice of managing information and data as key enterprise assets. For more information on the association visit www.dama.org.



Wilshire Conferences was founded with the objective of bringing high quality educational conferences to information technology professionals. In particular, Wilshire focuses on programs in the area of data management and application development. The company's philosophy is to provide educational environments that allow a high degree of interaction between instructor and student, and between student and student. Wilshire believes that shared experiences amongst peers provides the most cost-effective learning opportunity for IT professionals. For more information on Wilshire Conferences and future conferences and seminars visit www.WilshireConferences.com.

More Educational Programs from Wilshire Conferences in 2006

Go to the Wilshire Conferences web site at www.wilshireconferences.com to see a description of these educational programs, and sign up to receive announcements about our upcoming conferences and seminars:

Data Modeling Masterclass

by Graeme Simson
Washington, DC, Feb. 27-March 2, 2006

Conceptual Data Modeling: The Entity/Relationship Model

by William G. Smith
San Francisco, March 27-31, 2006

Logical & Physical Modeling

by William G. Smith
Chicago, May 22-26, 2006

And with Dates to be announced shortly on these upcoming programs:

Designing and Building Ontologies

Enterprise Architecture Conference

Master Data Management Conference (in conjunction with DAMA International)





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Sunday, April 23 Monday, April 24 Tuesday, April 25 Wednesday, April 26 Thursday, April 27

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Workshop, Tutorial, Conference Sessions, Seminar Sunday–Thursday, April 23–27 Includes lunch on Monday–Thursday		○ \$1695	○ \$1595
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Non-Attendee, CD-ROM Only option Includes workshops, tutorials, conference sessions, and seminars on CD-ROM. Shipping is additional. Sales tax added to California Orders. Will be shipped after the conference.		○ \$595	

*conference ends mid-day Thursday Your registration confirmation will be sent via email.

STEP 3

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 Everyone who registers for the Conference Sessions (Tuesday–Thursday) receives conference documentation on CD-ROM. If you would also like documentation in printed form, please select “CD plus book” and add \$150 to your registration fee. The printed option weighs approximately 15 pounds. Must be pre-ordered. No refunds.

CD only (included) **OR** Special Order: CD plus book (\$150) **Must be pre-ordered**

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- W1 Working with Corporate Politics to Help Data Management Succeed (Danette McGilvray)
- W2 Business Rules: What You Need to Know from A to Z (Ronald G. Ross)
- W3 “Actionable Solutions” for Data Governance, Stewardship & Metadata (Robert Seiner)
- W4 Universal Patterns in Data Modeling (Len Silverston, Paul Agnew)
- W5 How to Win Friends and Influence People with Painless Data Model Reviews (Karen Lopez)
- W6 Metadata Roadmap (Joyce Norris-Montanari)
- W7 The Intel Metadata Program: A Best Practices Case Study (Jackie Gibson, David Ashton, Thiru Thangarathinam)
- W8 Discovering Value from Text (Seth Grimes)
- W9 Taxonomy Development and Implementation (Seth Earley)
- W10 Data Management 101(Peter Aiken)

Please choose a **TUTORIAL** if you are registering for a **Monday Tutorial (April 24)**

- T1 Enterprise Architecture Principles and Values—Straight From the Source! (John Zachman)
- T2 Logical Data Modeling (William Smith)
- T3 Danger, Danger! Bad Data Ahead! (Claudia Imhoff)
- T4 Developing a Sustainable Enterprise Data Strategy (John Ladley)
- T5 BPM 101: An Introduction to Business Process Management and BPM Systems (Brett Champlin)
- T6 Effective Management of Master Data (David Loshin, Malcolm Chisholm)
- T7 Managed Metadata Environment Full Life-Cycle Roadmap (David Marco)
- T8 The Business of Metadata (R. Todd Stephens)
- T9 Crossing the Bridge from Unstructured Data to Structured Data and the Data Warehouse Environment (Bill Inmon)
- T10 Consulting Skills for Data Professionals (Graeme Simson)

Please choose a **SEMINAR** if you are registering for a **Thursday Afternoon Seminar (April 27)**

- S1 Making DM Relevant to the Enterprise and Keeping Your Job (Michael Scofield)
- S2 How to Build a Data Warehouse in a Day (Dan Paolini)
- S3 How to Design, Build and Use an Ontology—A Guide for Data Management Professionals (Dave McComb: Simon Robe)

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