



IBM Information Management



## Optimize your System z Data Warehouse with IBM ETL and Analytic Tools



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August 21, 2007

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- enhancements at some future date,
- a new release of DB2, or
- a Programming Temporary Fix (PTF)

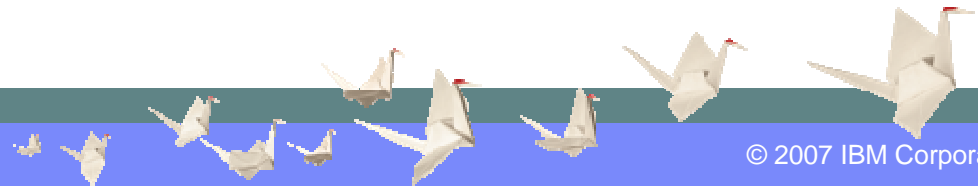
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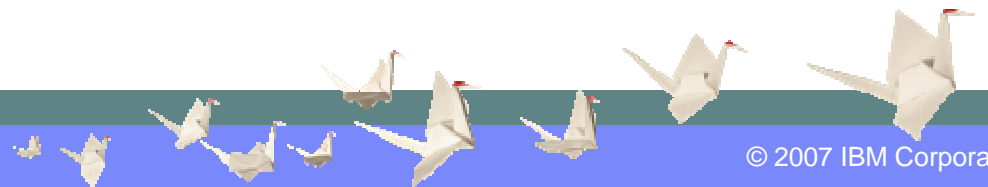
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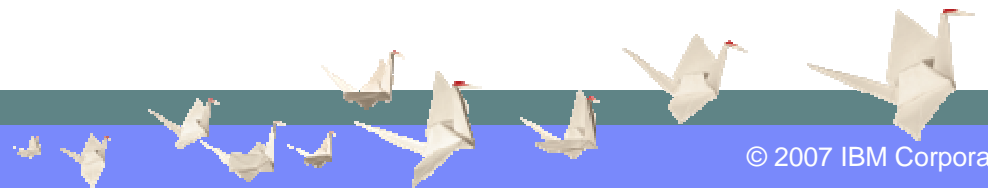
# Agenda

- Review of DW on System z (8/7 Teleconference)
- IBM Information Server Supporting DW on System z
- IBM Analysis & Reporting Tools Supporting DW on System z
- Q & A



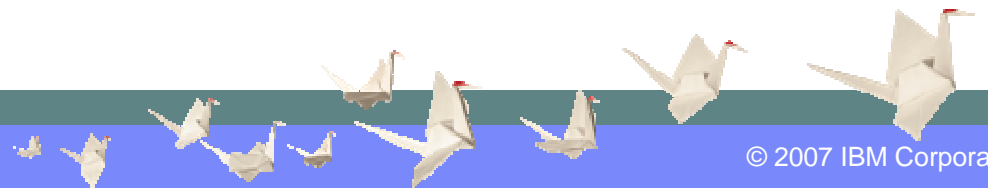
## Review of DW on System z

- Today's Teleconference is designed to build upon 8/7 Teleconference
- "Leveraging DB2 z/OS and System z for Dynamic Warehousing"



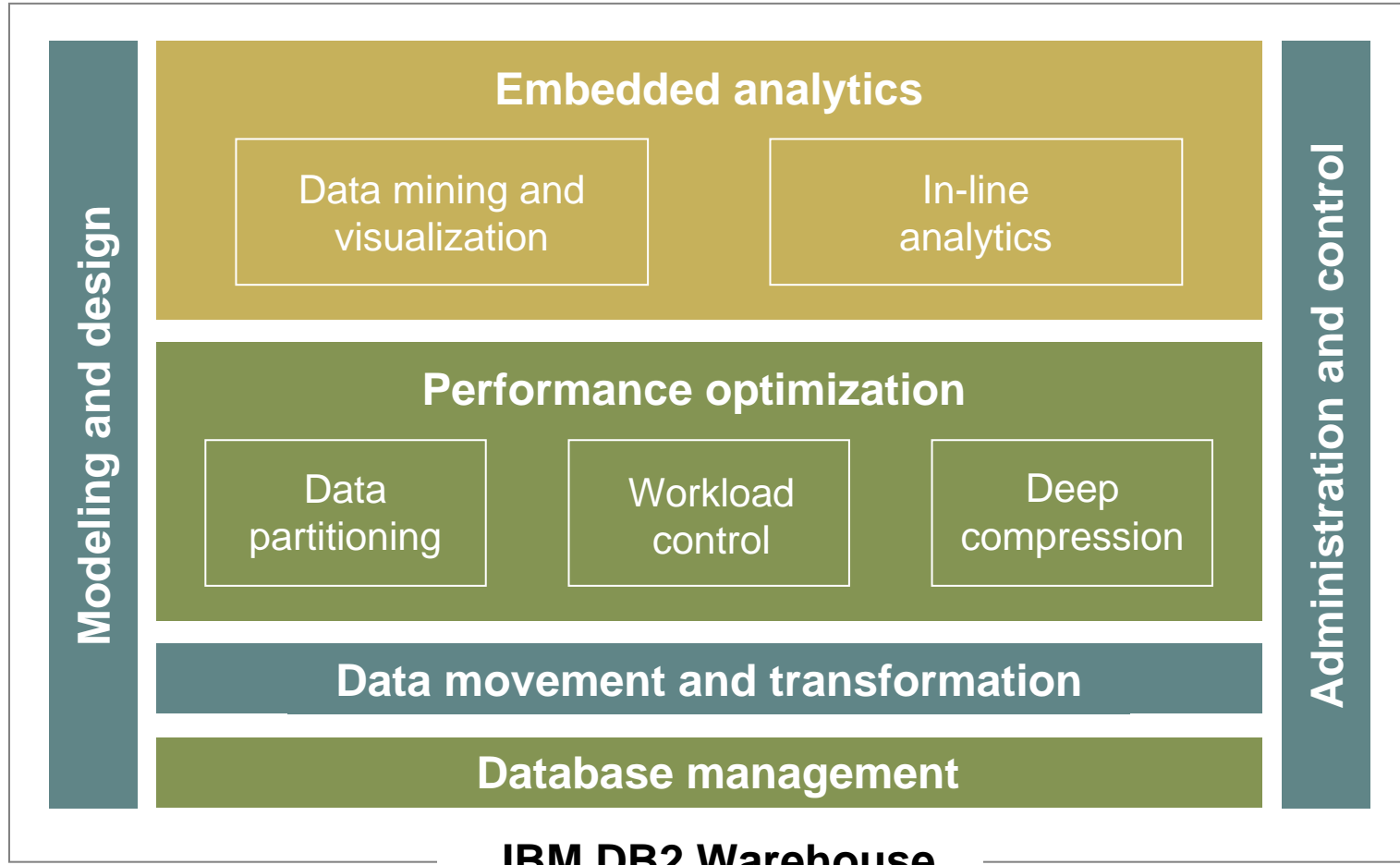
## 8/7 Teleconference Summary

- Introduced Dynamic Warehousing & Established DW on DB2 z/OS as a full participant in that IBM Initiative
- Introduced Layered Data Architecture as an approach that seeks to consolidate the logical components of a DW environment (ODS, DW & DM's) within a single database environment
- Reviewed What is Available Today to Support DW on System z
- Recommended a Solution Architecture for DW on System z

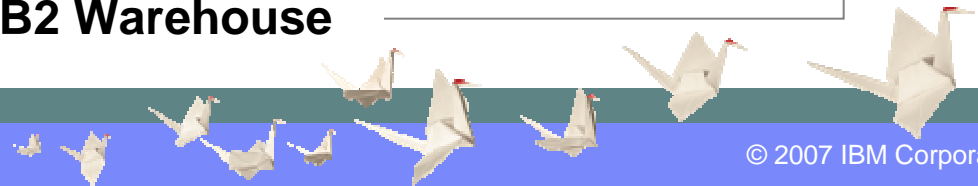


# IBM DB2 Warehouse software

*A complete, integrated platform*

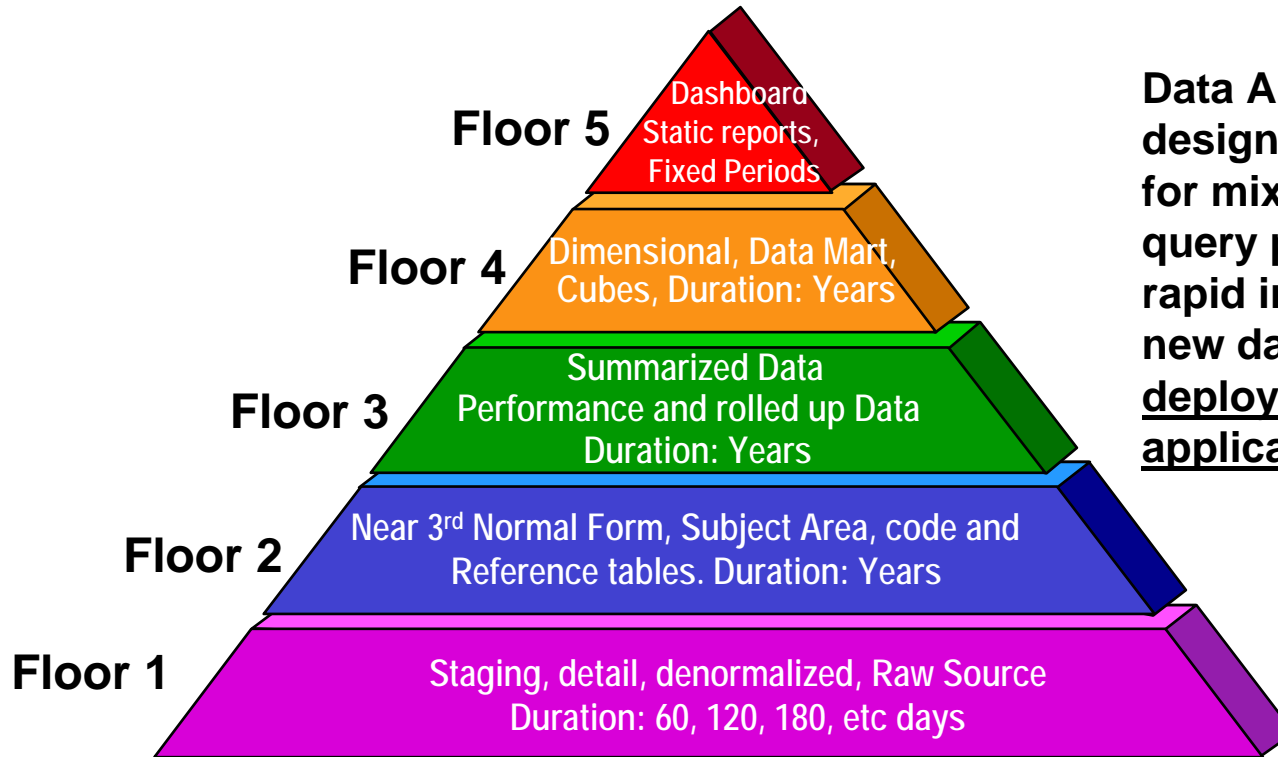


**IBM DB2 Warehouse**



## Layered “Data Architecture”

As data ages it flows through the layers



**Data Architecture designed specifically for mixed workloads, query performance, rapid incorporation of new data sources, and deployment of new applications.**

# What DW/BI Capabilities Exist Today for System z

## ▪ DB2 z/OS V8 & V9 EDW Base

- Functional and performance enhancements
- Easier online reporting and data management capabilities
- DB2 family compatibility – including MQTs

## ▪ Integration (EDW ETL)

- WS DataStage EE, WS Classic Federation Server, WS Classic Data Event Publishers, Distributed DBMS Event Publishers, BatchPipes for OS/390, DB2 Unload/Load Utilities
- IBM Information Server (WS Information Analyzer, WS QualityStage)

## ▪ Analyze/Report

- Alphablox, QMF, DataQuant
- Partner offerings from Cognos, Hyperion (Oracle), Business Objects, SAS, IBI

## ▪ Performance Management

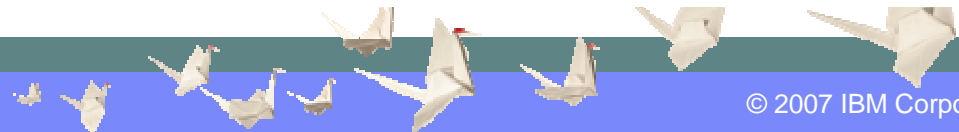
- IBM Tivoli Omegamon XE for DB2 Performance Expert on z/OS, DB2 Query Monitor, Optimization Service Center (V9)

## ▪ Security and Regulatory Compliance

- DB2 Data Archive Expert, DB2 Test Database Generator, DB2 Audit Manager Expert, IBM Encryption for DB2 and IMS Databases

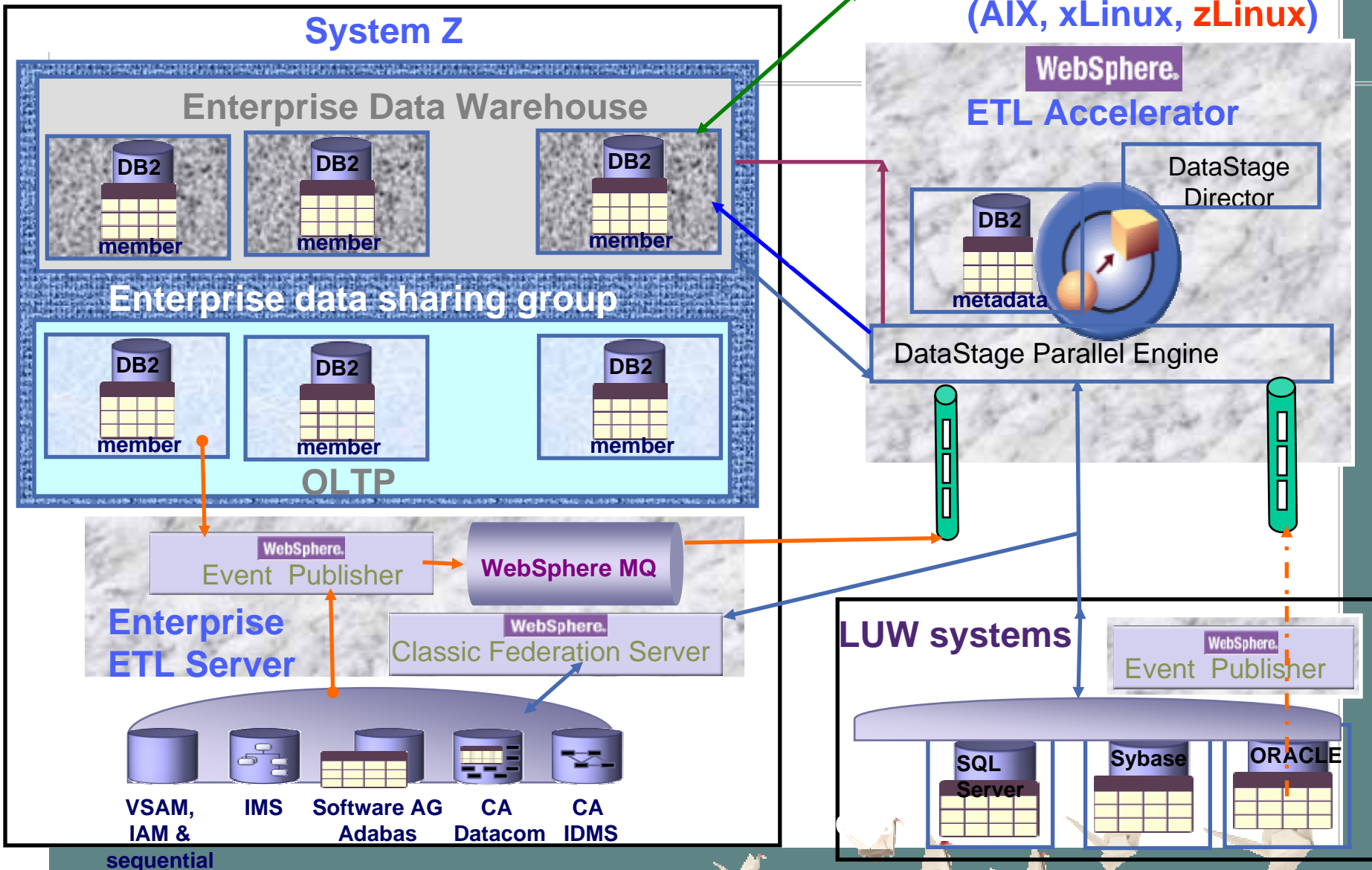
## ▪ Application Management

- DB2 Table Editor, DB2 Web Query Tool, DB2 Automation Tool, DB2 Query Monitor

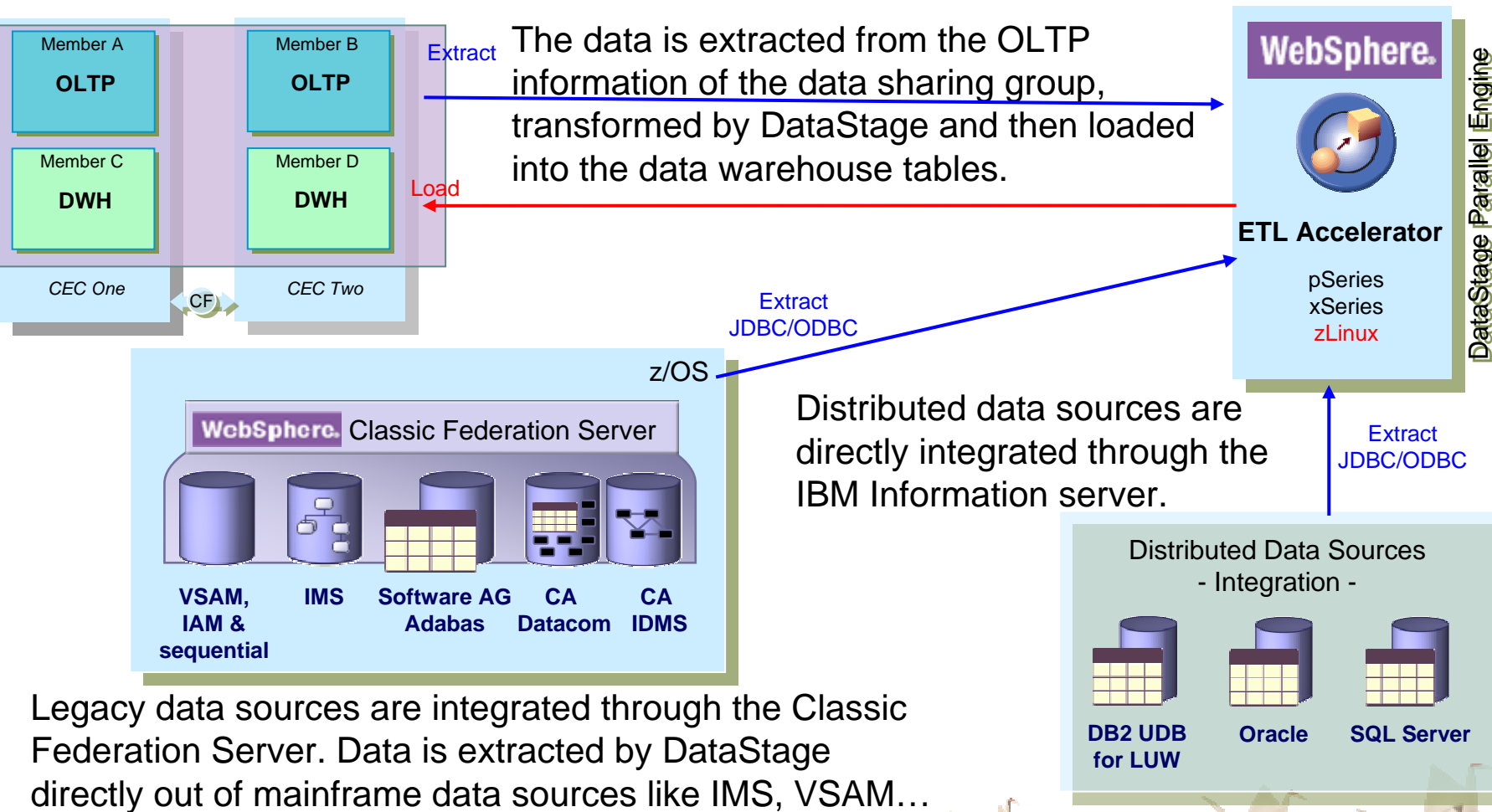




# DB2 z/OS BI solution architecture



# Initial load of the Data Warehouse

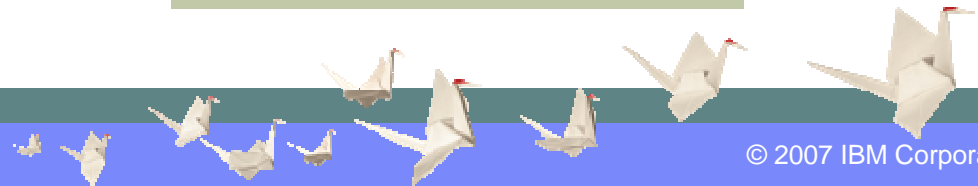
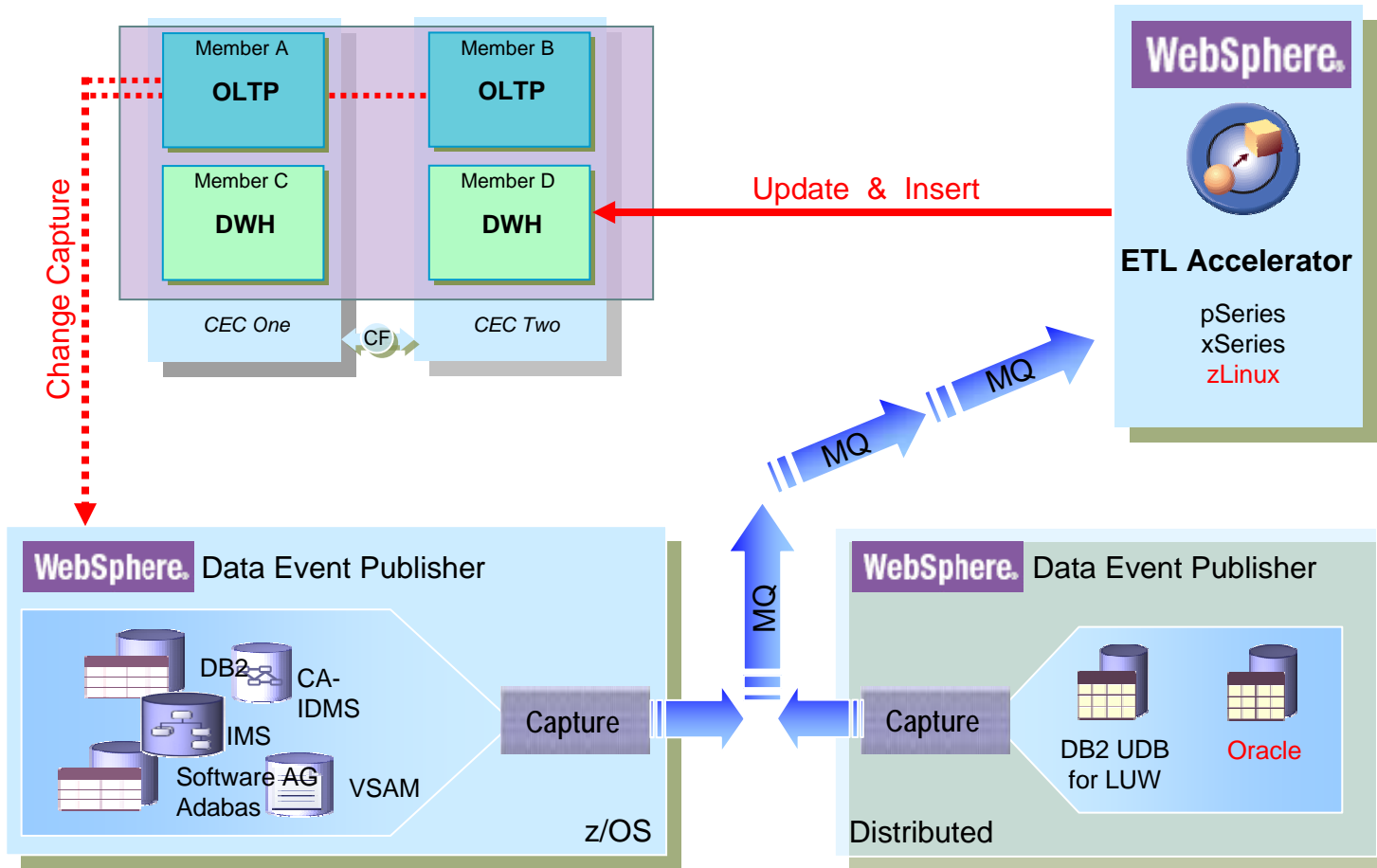


The data is extracted from the OLTP information of the data sharing group, transformed by DataStage and then loaded into the data warehouse tables.

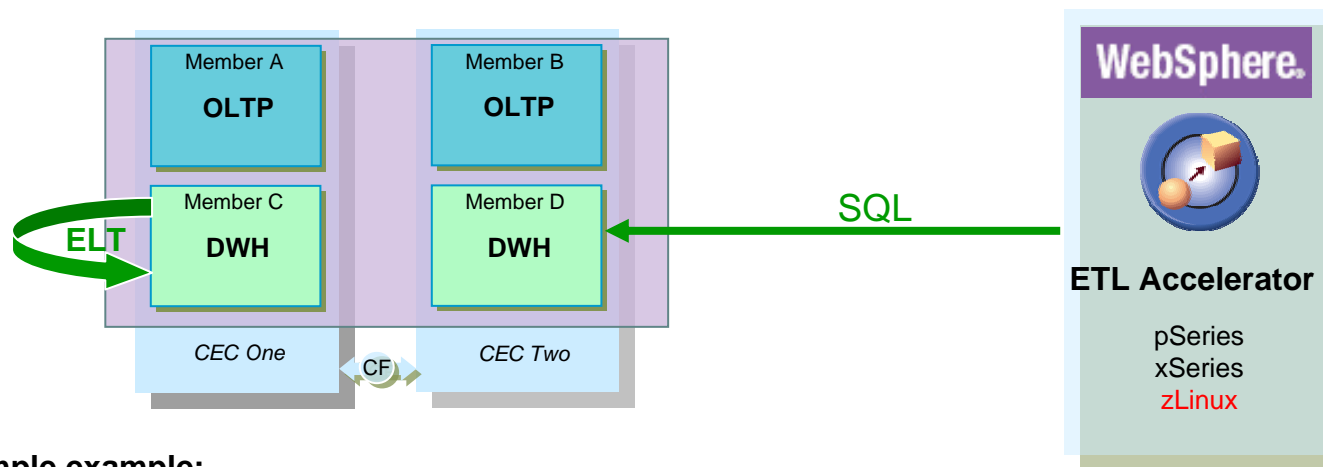
Distributed data sources are directly integrated through the IBM Information server.

Legacy data sources are integrated through the Classic Federation Server. Data is extracted by DataStage directly out of mainframe data sources like IMS, VSAM...

# At runtime, the Data Warehouse is updated incrementally



## In Database ELT is triggered by DataStage



### Simple example:

-- Aggregate by salary by department into AGGRSALARY

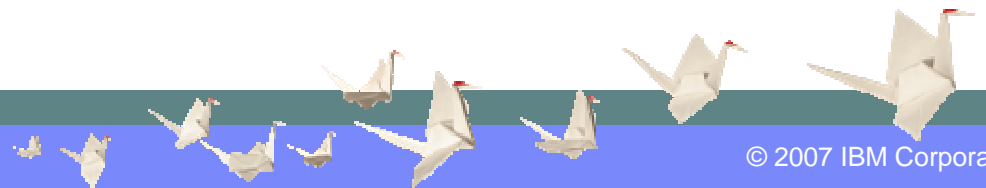
```
INSERT INTO AGGRSALARY ( DEPTCODE, AVGBAND, AVGSALARY )
  SELECT DEPTCODE, AVG( BAND ) AS AVGBAND, AVG( SALARY ) AS AVGSALARY
  FROM STAFF GROUP BY DEPTCODE
```

Wherever possible, “In Database” transformations (ETL) are used to spare the transport of the data to the accelerator. But the used SQL is still sent from the ETL Accelerator to the database to have one place of documentation for all ETL steps.

This can also be used to shift the data up the hierarchy within the Layered Data Architecture.

## 8/21 Teleconference Intent

- Expand on "building the warehouse" Components of BI Solution Architecture delivered by IBM Information Server Products
- Expand on Analysis & Reporting Component of BI Solution Architecture delivered by DataQuant & AlphaBlox Products



# The IBM Information Server

*Delivering information you can trust*

## IBM Information Server

### Unified Deployment

#### Understand



Discover, model, and govern information structure and content

#### Cleanse



Standardize, merge, and correct information

#### Transform



Combine and restructure information for new uses

#### Deliver

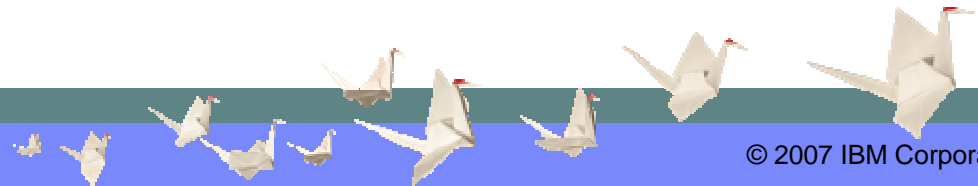


Synchronize, virtualize and move information for in-line delivery

### Unified Metadata Management

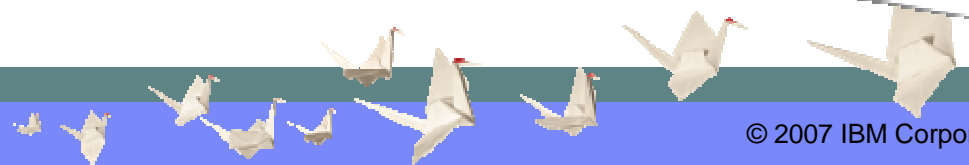
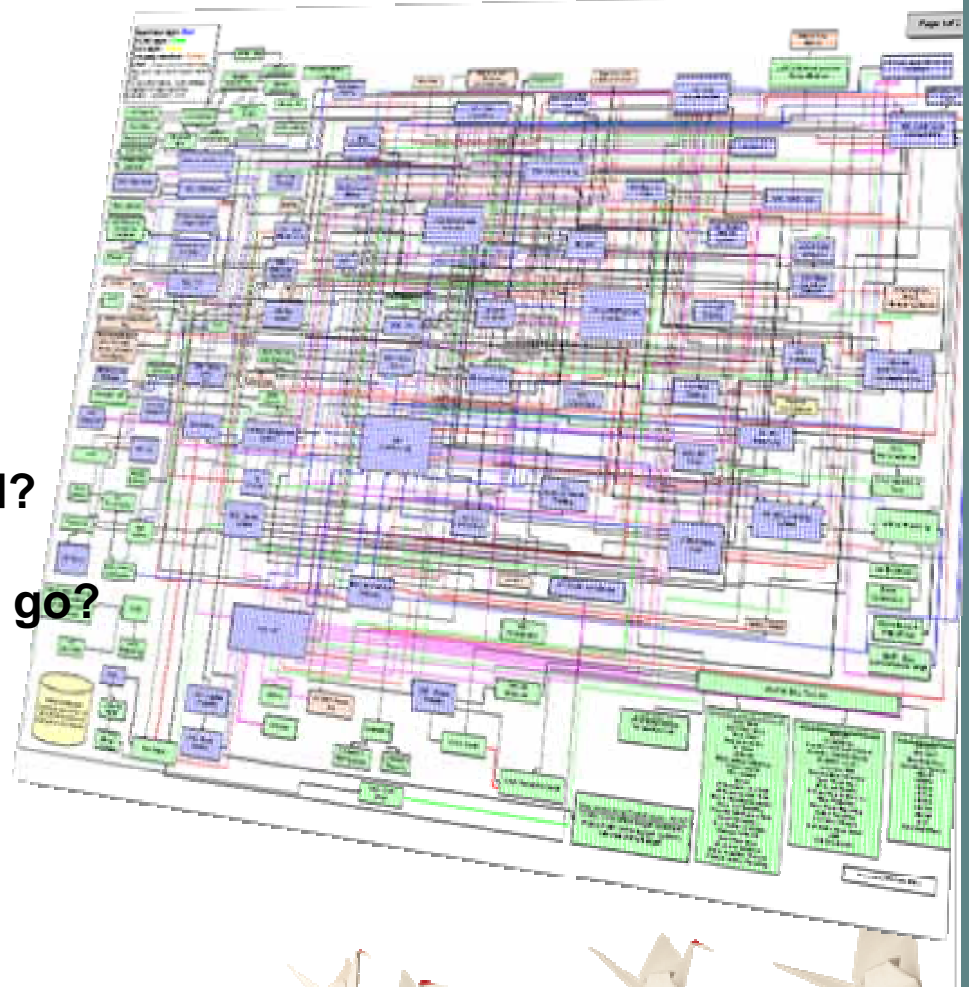
### Parallel Processing

Rich Connectivity to Applications, Data, and Content



# Why is it Important to Begin with Understanding?

- Where is my information?
- How do I get it when I need it?
- What does it mean?
- Can I trust it?
- How do I get it in the form I need?
- How do I get it where it needs to go?
- How do I control it?



# WebSphere Business Glossary

## Business Meta Data

- Web-based authoring, managing & sharing of business metadata
- Aligns the efforts of IT with the goals of the business
- Provides business context to information technology assets
- Establishes responsibility and accountability



**Subject Matter Experts**



**Business Users**

**WebSphere Business Glossary**

**Create and manage business vocabulary and relationships, while linking to physical sources**

Database = DB2

Schema =  
NAACCT

Table =  
DLYTRANS

Column =  
ACCT\_NO

data type =  
char(11)



Technical



Business

GL Account Number

The ten digit account number. Sometimes referred to as the account ID. This value is of the form L-FIIIIVVVV.





# Rational Data Architect

## Logical Meta Data

- Data modeling for data structures and federations
- Federated data discovery
- Metadata relationship discovery and mapping
- Impact analysis, and synchronization across models
- SQL & XML generation capabilities



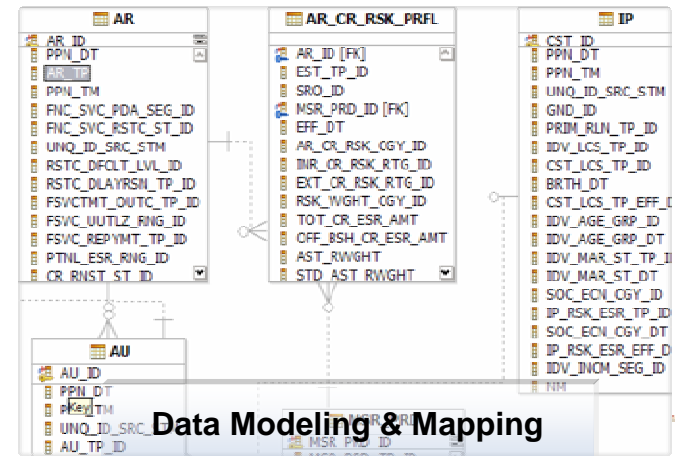
Subject Matter Experts



Architects

**Rational Data Architect**

**Create and manage business vocabulary and relationships, while linking to physical sources**



# WebSphere Information Analyzer

## Physical Meta Data

- Data-centric analysis of application, database and file-based sources
- Secure, detailed profiling of fields, across fields and across sources
- Creation of metadata from profiling results
- Results instantly promotable across IBM Information Server



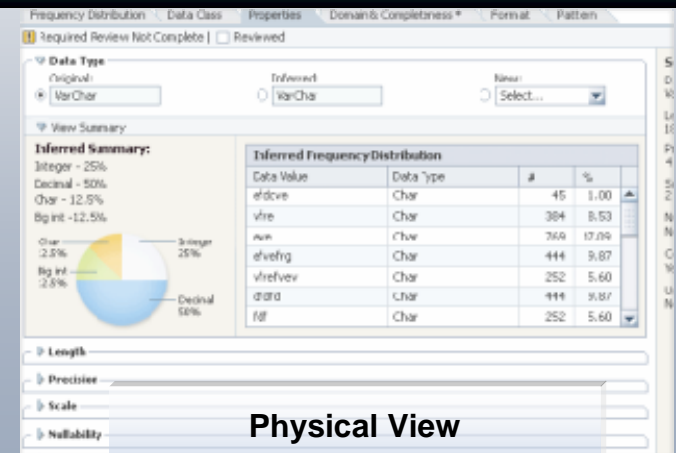
**Subject Matter Experts**



**Data Analysts**

## WebSphere Information Analyzer

Analyze source data structures, and monitor adherence to integration and quality rules



# Why Care About Cleansing Information?

- Lack of information standards
  - ▶ Different formats & structures across different systems
- Data surprises in fields
  - ▶ Data misplaced in the database
- Information is buried
  - ▶ Free-form fields
- Data myopia
  - ▶ Lack of consistent identifiers inhibit a single view of:
    - customers - products ...
- The redundancy nightmare
  - ▶ Duplicate records with a lack of standards

Kate A. Roberts 416 Columbus Ave #2, Boston, Mass 02116

Catherine Roberts Four sixteen Columbus APT2, Boston, MA 02116

Mrs. K. Roberts 416 Columbus Suite #2, Suffolk County 02116

Name	Tax ID	Telephone
J Smith DBA Lime Cons.	228-02-1975	6173380300
Williams & Co. C/O Bill	025-37-1888	415-392-2000
1st Natl Provident	34-2671434	3380321
HP 15 State St.	508-466-1200	Orlando

WING ASSY DRILL 4 HOLE USE 5J868A HEXBOLT 1/4 INCH  
 WING ASSEMBY, USE 5J868-A HEX BOLT .25" - DRILL FOUR HOLES  
 USE 4 5J868A BOLTS (HEX .25) - DRILL HOLES FOR EA ON WING ASSEM  
 RUDER, TAP 6 WHOLES, SECURE W/KL2301 RIVETS (10 CM)

19-84-103 RS232 Cable 6' M-F Cands

CS-89641 6 ft. Cable Male-F, RS232 #87951

C&SUCH6 Male/Female 25 PIN 6 Foot Cable

90328574	IBM	187 N.Pk. Str. Salem NH 01456
90328575	I.B.M. Inc.	187 N.Pk. St. Salem NH 01456
90238495	Int. Bus. Machines	187 No. Park St Salem NH 04156
90233479	International Bus. M.	187 Park Ave Salem NH 04156
90233489	Inter-Nation Consults	15 Main Street Andover MA 02341
90345672	I.B. Manufacturing	Park Blvd. Bostno MA 04106

Cleanse



# WebSphere QualityStage

- Specialized data quality functions seamlessly integrated with DataStage
- Visual tools for defining complex matching and survivorship logic
- Ensures clean, standardized, de-duplicated information
- Enables a single version of the truth

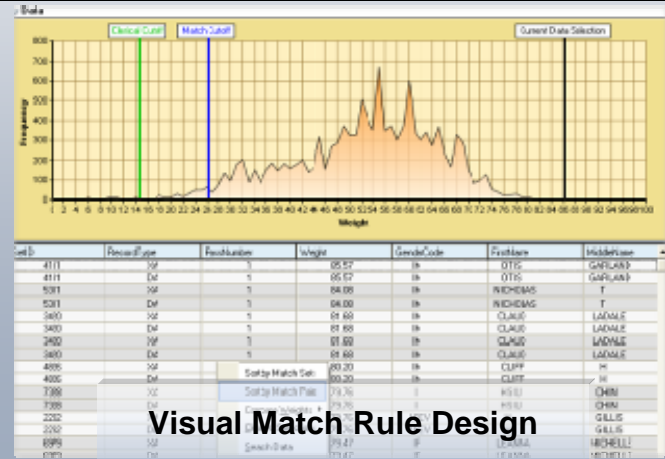


Subject Matter Experts



Data Analysts

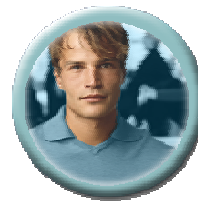
WebSphere QualityStage™  
 Standardize and correct source data fields, and match records together across sources to create a single view



Visual Match Rule Design

# What Is Important About Transformation & Delivery?

- Transformation is key to enabling information to be used in new business contexts – it needs to be metadata-driven
- Designed for use by information experts using the understanding imparted by the metadata
- Transformation and Delivery can be reused across multiple mechanisms
  - ▶ Large volume batch movement
  - ▶ Real-time event-driven response
  - ▶ Service-oriented architecture
  - ▶ Federated query



Data Analysts



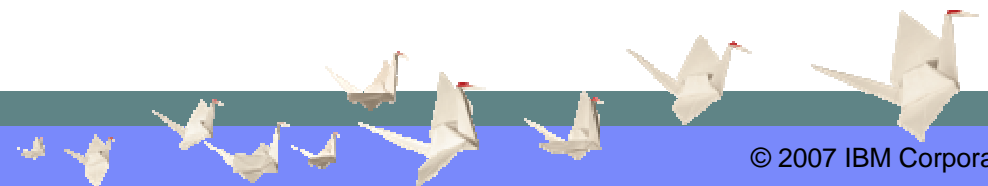
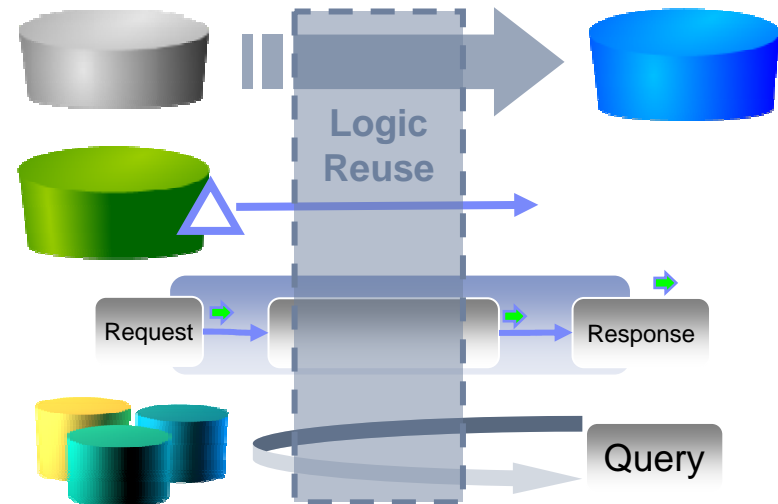
Data Architects



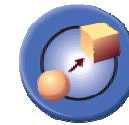
DBAs



Subject Matter Experts



Transform Deliver



# WebSphere DataStage

- Codeless visual design of data flows with hundreds of built-in transformation functions
- Optimized reuse of data integration objects
- Leverages parallel processing without requiring design changes
- Capable of supporting batch and real-time operations



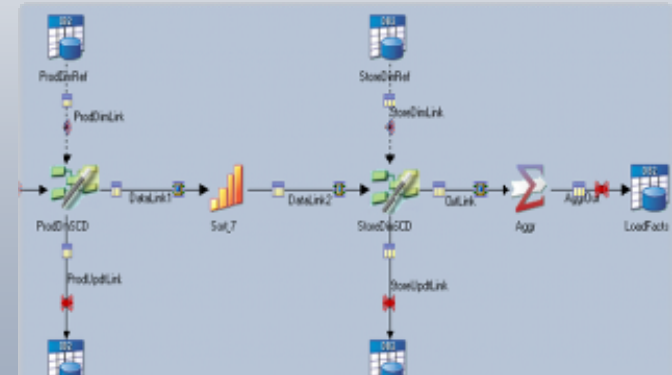
Developers



Architects

WebSphere DataStage®

Transform and aggregate any volume of information in batch or real time through visually designed logic



**Hundreds of Built-in Transformation Functions**



# WebSphere Federation Server

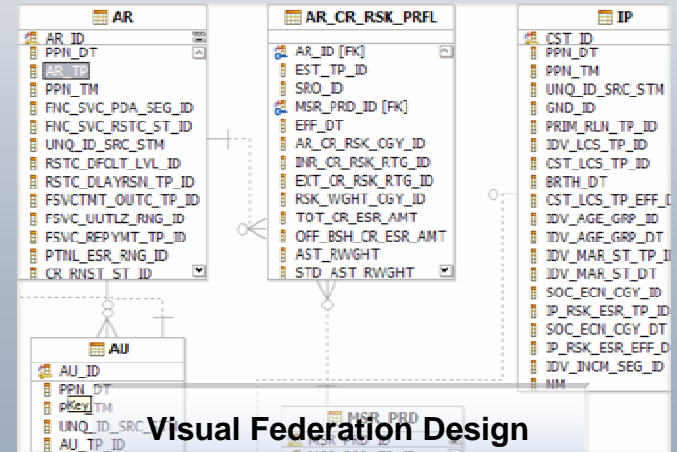
## SQL Access to distributed data

- Access diverse & distributed information as if it were in one system
- Industry leading query optimization with single sign-on, unified views, and function compensation
- Transactional write capabilities across heterogeneous sources
- Visual tools for federated data discovery & data modeling

### WebSphere Federation Server

Access and integrate heterogeneous information across multiple sources as if they were a single source

Extend value of existing analytical applications by providing real-time access to integrated information





# WebSphere Classic Federation Server

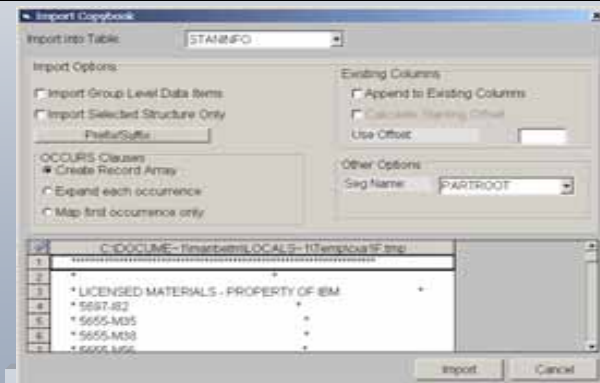
## Read/Write mainframe data using SQL

- Metadata-driven, so there's no mainframe programming required
- Works with existing mainframe infrastructure and "modern" applications and tools you need
- Deliver mainframe data to
  - ▶ Self-service portals
  - ▶ e-commerce solutions
  - ▶ Reporting and analytical tools
  - ▶ IBM's own data profiling, cleansing and transformation solutions
- Sources:
  - ▶ VSAM, IMS, CA-IDMS, CA-Datacom, Software AG Adabas, DB2

### IBM WebSphere Classic Federation Server

Read-from and write-to mainframe data sources using SQL from Unix, Windows, Linux and JVM platforms

Empowers mainframe data integration with Information Server components, your applications as well as IBM and 3<sup>rd</sup> party tools and applications



Dynamic Visual Metadata Management





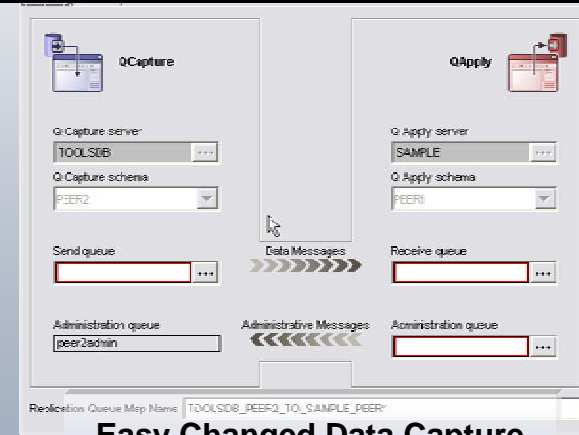
# WebSphere Data Event Publishers

## Push Changed Data "Events"

- Feed data to DataStage for change-only updating of the warehouse
- Loosely-coupled, no impact on applications
- Low-latency or scheduled data capture
- Multiple publication formats:
  - ▶ Consistent relational format for ease of use
  - ▶ XML for ease of consumption
  - ▶ Delimited values minimizes message size
- Recoverability, assured delivery
- Sources:
  - ▶ DB2, IMS, CA-IDMS & Software AG Adabas

### IBM WebSphere Data Event Publisher

Detect and respond to data changes in source systems, and publish changes to subscribed systems, to ETL or to other modules for event-based processing



# The IBM Information Server

## *What makes it a PLATFORM?*

### IBM Information Server

## Unified Deployment

#### Understand



Discover, model, and govern information structure and content

#### Cleanse



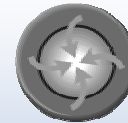
Standardize, merge, and correct information

#### Transform



Combine and restructure information for new uses

#### Deliver



Synchronize, virtualize and move information for in-line delivery

## Unified Metadata Management

## Parallel Processing

## Rich Connectivity to Applications, Data, and Content

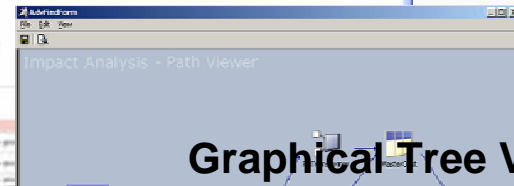
# IBM Information Server Platform Features

- Role-Based Tools with Integrated Metadata
  - ▶ Simplify Integration
  - ▶ Promote reuse
  - ▶ Increase compliance to standards
  - ▶ Open to 3<sup>rd</sup> party integration
- Visual lineage reporting increases trust
- Graphical impact analysis facilitates change management

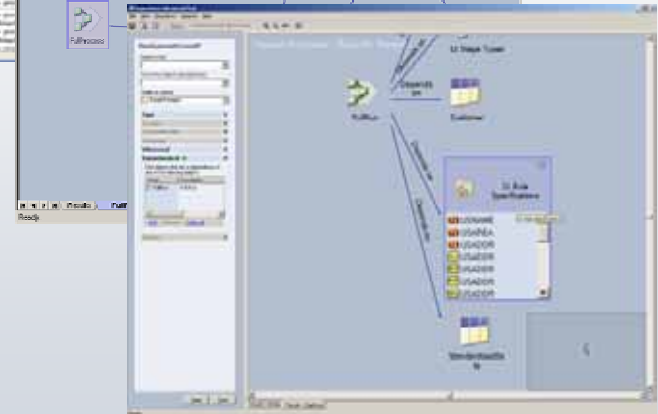
## HTML View



## Path View



## Graphical Tree View



# Information Server Platform: Rich Connectivity

## General Access

Sequential File  
Complex Flat File  
File Set  
Data Set  
Named File  
FTP (standard, secure)  
Compressed / Encoded Data

## Real-Time

WebSphere MQ  
SeeBeyond  
Java Messaging Services (JMS)  
Java (Client & Transformer)  
XML (Read / Write)  
XSL-T / XSL-T Transformer  
Web Services (SOAP)

## Enterprise Applications

JD Edwards Oneworld (direct)  
Oracle Applications (Direct, Hierarchy)  
PeopleSoft (Direct, Trees)  
SAP BW (BAPI, IDOC)  
SAP R/3 (AEAP, EAPI, IDOC)  
Siebel (IBM Business)

## Connect

Allbase/SQL  
Cache  
C-ISAM  
Datacom/DB  
DB2 UDB  
DB2/400  
DEMS

## MS Analysis

Nomad  
Non StopSQL  
Nucleus  
ODBC  
OLAP Services  
Oracle  
Progress

Shared, easy to use connectivity infrastructure

Best-of-breed, metadata-driven connectivity to enterprise applications

High volume, parallel connectivity to databases and file systems

Event-driven, real-time, and batch connectivity

The screenshot shows the IBM Information Server configuration interface. A stage named 'Customer\_Records' is selected, with properties for 'Connection' (Data source, Username, Password) and 'Stage' (End of Wave, Isolation level, Enable Unicode, Before SQL, After SQL, Before SQL, After SQL). A 'Frictionless Connectivity' banner is overlaid on the bottom of the interface. Surrounding the screenshot are logos for various supported systems: SAP, PeopleSoft, Siebel, JDA, ARIBA, SAS, QFT, IBM MS, VSAM, SQL Server (ODBC, OLE DB), Sybase, Informatica, Microsoft, SYBASE, IBM Business Exchange Formats, Teradata, ORACLE, and others.

# WebSphere Information Services Director

## Rapid SOA Deployment:

- Packages information integration logic as services that insulate developers from underlying sources
- Allows these services to be invoked as Enterprise Java Beans or Web services
- Provides load balancing & fault tolerance for requests across multiple Information Servers
- Provides foundation infrastructure for Information Services



Developers



Architects

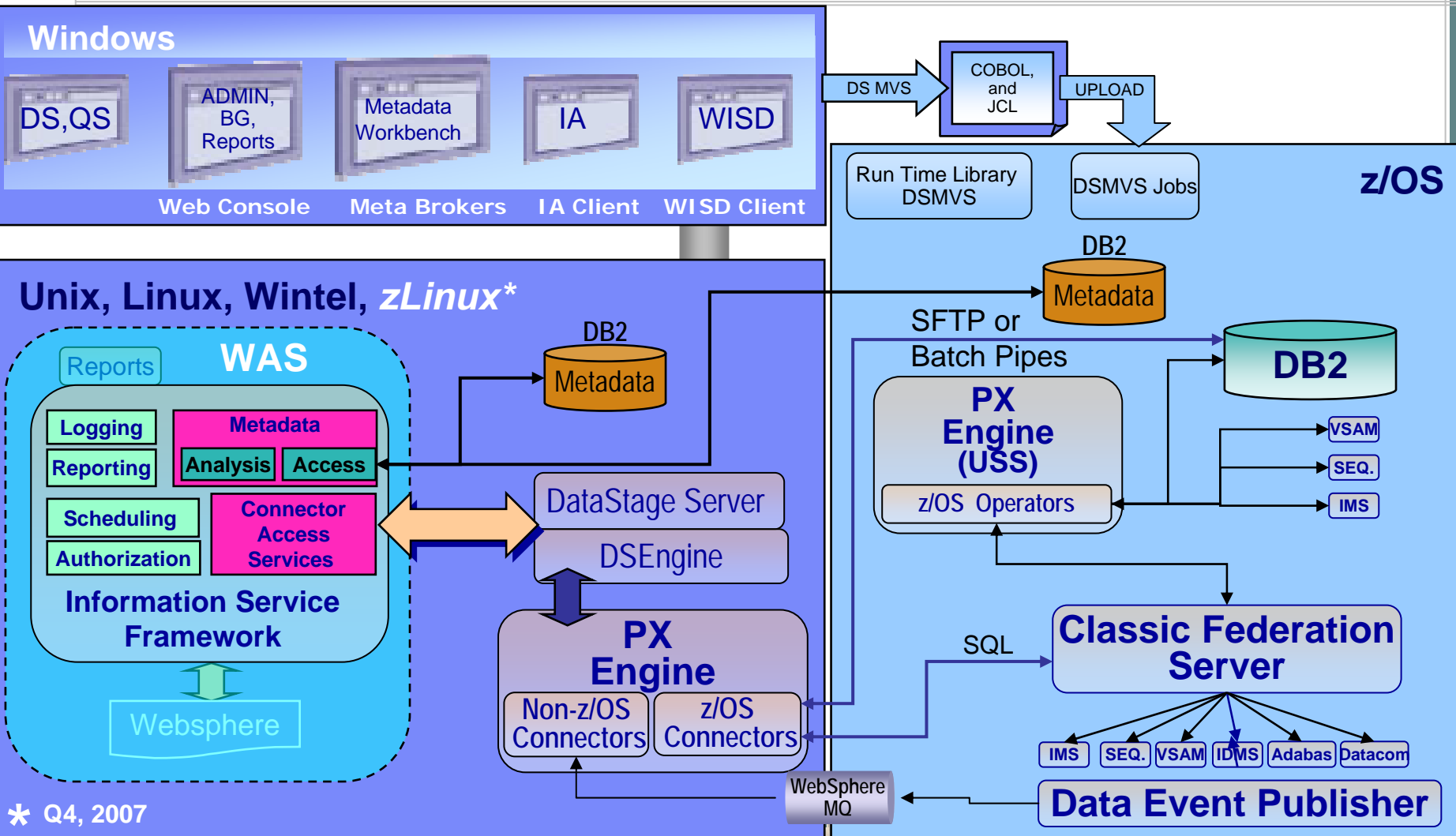
WebSphere Information Services Director

Flexibly deploy and manage reusable  
information services without hand  
coding

A screenshot of the WebSphere Information Services Director console. The interface shows a 'Service 01' configuration page. Under the 'Bindings' section, there are two main categories: 'EJB' and 'SOAP over HTTP/JMS'. The 'EJB' section has a checked 'Enable Binding' checkbox and fields for 'JNDI Name' and 'Package Name'. The 'SOAP over HTTP' section has an unchecked 'Enable Binding' checkbox and fields for 'Activation Spec. JNDI Name', 'SOAP Style' (set to 'Select'), and 'Priority'. The 'SOAP over JMS' section has an unchecked 'Enable Binding' checkbox and fields for 'Description', 'Destination', 'SOAP Action', and 'JMS Destination Mode'. A large, semi-transparent box with the text 'Rapid SOA Deployment' is overlaid on the bottom right of the screenshot.

# IBM Information Server Implementation Architecture

Leveraging the power of a multi-platform Environment



\* Q4, 2007

# IBM Analysis & Reporting Products

## ■ IBM DB2 DataQuant

- Out of the box query, reporting, analysis and dashboards
- Server-based licensing and deployment
- Rich client and thin client architectures
- Easy to use, programmer free



## ■ IBM DB2 Alphablox

- In-depth analytical tool
- Rich development environment for imbedded analytics
- OLAP analysis and 'cube engine'

# Overview – IBM DataQuant

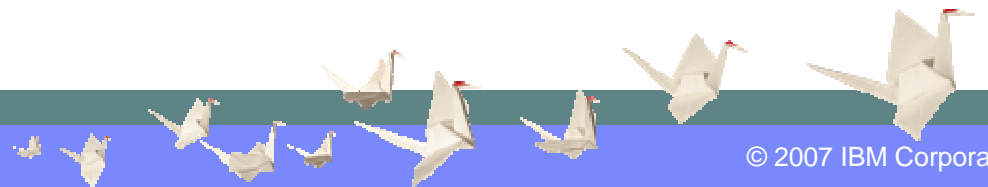
## ▪ Provides

- a comprehensive query, reporting and data visualization package
- support for both web and workstation-based environments.

## ▪ Introduces

- a wide variety of powerful business intelligence capabilities, from executive dashboards
- interactive visual applications to information-rich graphical reports and ad-hoc querying and data analysis.

Together with over 100 built-in analytical functions, IBM DataQuant allows organizations to derive maximum value from their data and rapidly build and distribute comprehensive data visualization solutions across the enterprise.





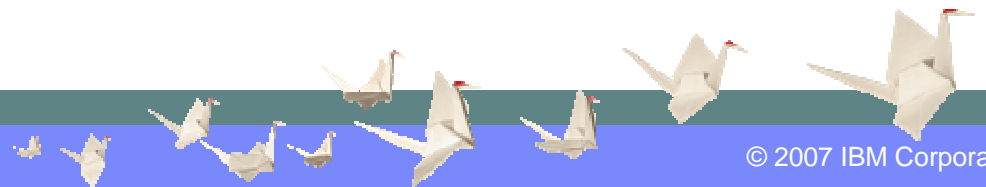
# Product Components

## ■ DataQuant for Workstation

- Java-based, rich client application based upon the award-winning Eclipse platform
- Provides a graphical environment for the development of query, report, dashboard and database visualization solutions
- Supports multiple workstation environments, including Windows, Linux, HP-UX and Solaris

## ■ DataQuant for WebSphere

- Provides a comprehensive runtime environment, capable of displaying all DataQuant content, under a HTML, 'thin client' model
- Runs under IBM WebSphere Application Server (WAS) on all platforms supported by WAS, including Windows, Linux, Solaris, HP-UX, iSeries, zLinux and z/OS



# Highlights

## ■ Visual Dashboards

- Interactive dashboards and database visualization applications
- Offers dozens of interactive charts, layouts, controls and symbols

## ■ Enhanced graphical reporting

- Rapidly produce and disseminate rich graphical BI reports

## ■ Security & Personalization

- Comprehensive LDAP or ad-hoc security model
- Ability to define role-specific BI workspaces on a user/group basis

## ■ SOA Layer

- Allowing queries, reports & BI solutions to be shared with both internal users and external organizations outside of the enterprise

## ■ Enhanced Analytics

- Adds over 100 analytical functions to queries, reports and visual solutions

## ■ Backward-compatible with existing QMF infrastructure



# Visual Dashboards

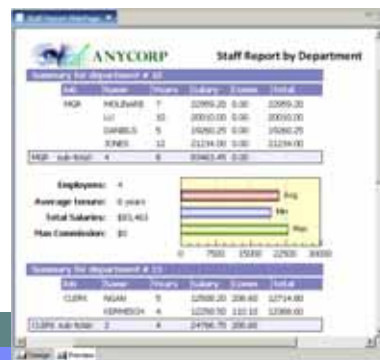


## ■ Provides a rapid development environment for:

- Executive dashboards
- Information portals
- ‘What if’-style analytical applications

## ■ Key benefits

- Highly graphical, visually intuitive solutions
- Rapid development model permits solutions to be developed and deployed within days, rather than weeks, using a zero-coding, drag and drop authoring model
- **Optionally leverages existing QMF queries**
- **Deployment** via web browsers (thin client) and/or the DataQuant for Workstation application (rich client)



# Visual Dashboards (cont.)

## Supports over 20 'stock' visual layouts

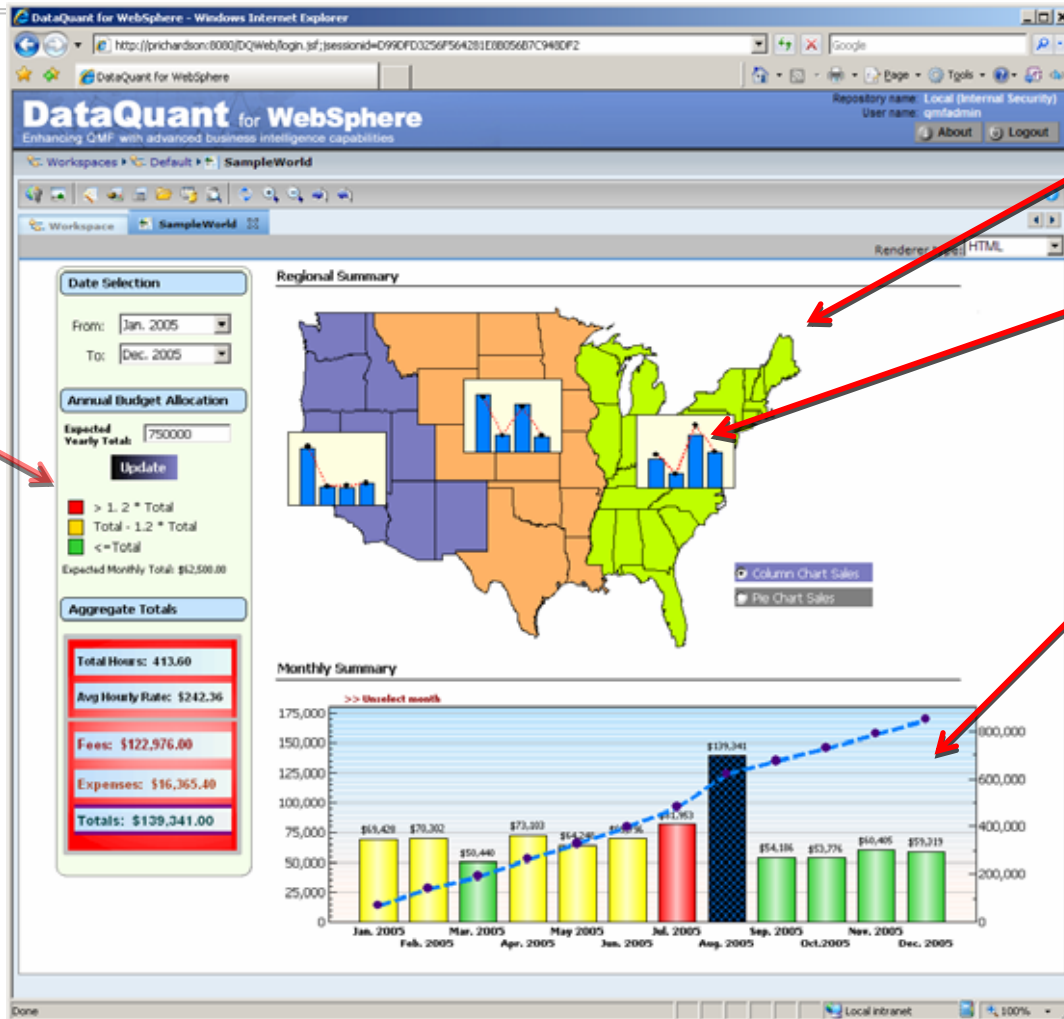
- Line and bar charts
- Geographic maps
- Pie charts
- Horizon charts
- Hierarchical charts
- Tabular layouts

## Flexible rendering

- Motifs can be nested indefinitely (e.g. pie charts upon bars within maps etc.)
- Customized graphical 'templates' – users can build their own chart types



# Enterprise Business Intelligence



Geospatial data from **DB2 on Linux**

Annualized sales data from **Informix**

Monthly transactional summaries from **DB2 on z/OS**

Budgeting and business rules from **DB2 on AIX**

Additional input from:  
**Oracle**  
**Teradata**  
**SQL Server**  
**Sybase ...**

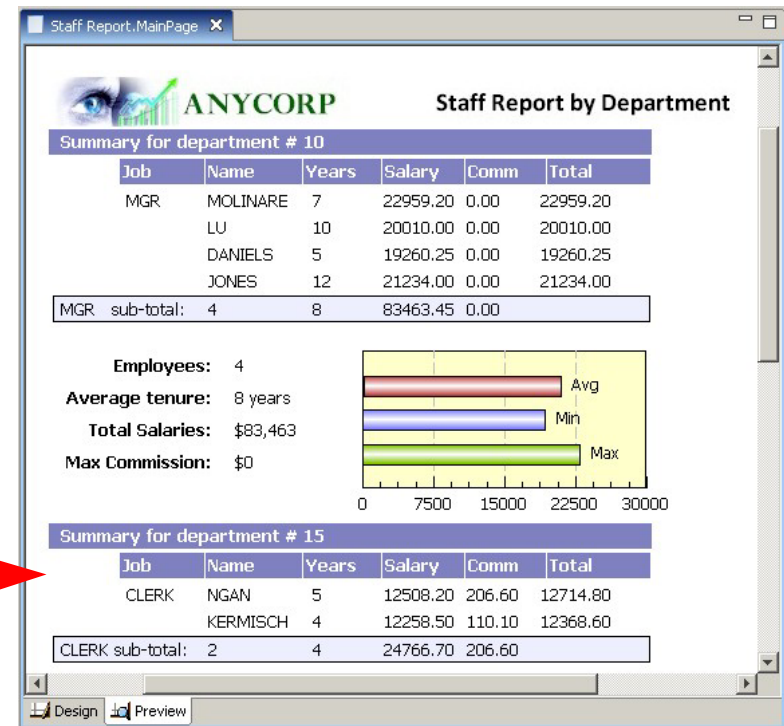
# Enhanced Graphical Reporting

- Transforms text-based reports into highly graphical, information-rich documents (HTML or PDF output)
- Familiar data-driven 'sectional report' model, with ability to 'nest' an unlimited number of subordinate queries

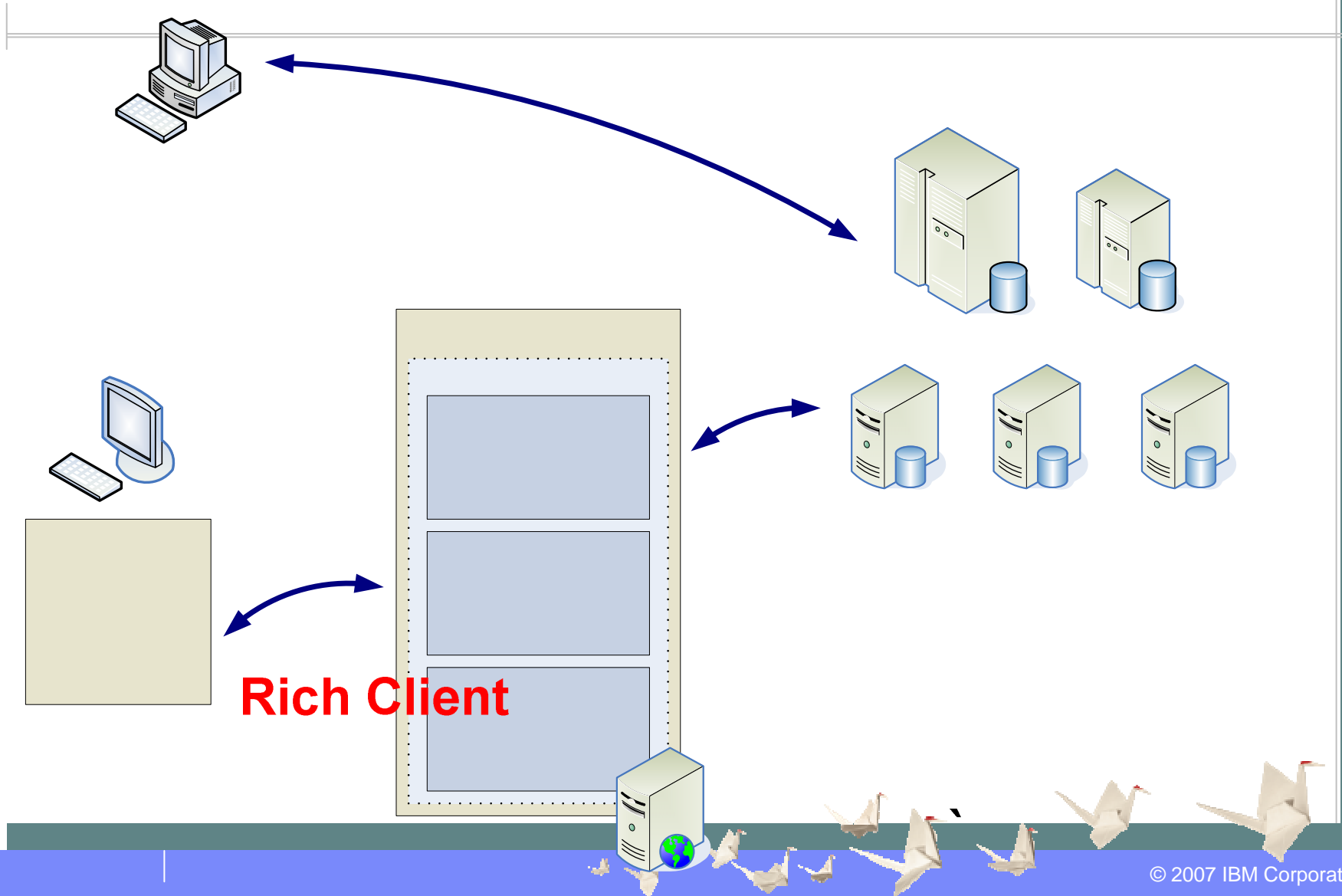
APPSAMPLE.MainPage

DEPT	JOB	NAME	YEARS	SALARY	COMM
10	Mgr	Molinare	7	22959.20	0.00
		Lu	10	20010.00	0.00
		Daniels	5	19260.25	0.00
		Jones	12	21234.00	0.00
<b>Department Total:</b>			<b>8.5</b>	<b>83463</b>	<b>0</b>
15	Clerk	Ngan	5	12508.20	206.60
		Kermisch	4	12258.50	316.70
			4.5	24767	317
	Mgr	Hanes	10	20659.80	0.00
			10.0	20660	317
Sales		Rothman	7	1152.83	1152.00
			7.0	1469	1469
<b>Department Total:</b>			<b>6.5</b>	<b>14535</b>	<b>1469</b>
20	Clerk	James	0	13504.60	0.00
		Sneider	8	14252.75	253
			8.0	27757	253

Design Preview

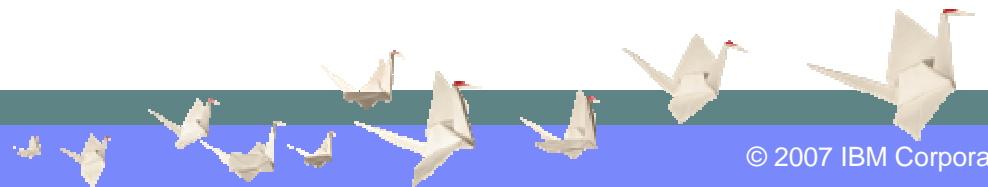


# DataQuant Architecture



# Security & Personalization

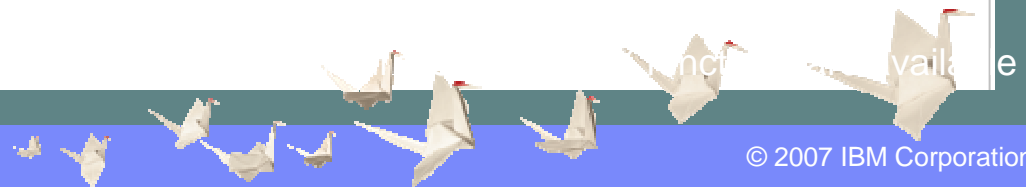
- **Robust security and support for single sign-on**
  - Introduces a comprehensive security foundation
  - Optionally interfaces with existing LDAP directories or RACF etc.
  - Built-in 'internal security' model available for customers that do not operate LDAP-based directories
  - Optionally logs onto data sources using accounts mapped from LDAP/internal security directory
- **Personalization**
  - Tailors 'look and feel', including available reports, visualizations and data on a per user/group basis
  - Ability to store user and group-specific offline views of database contents
  - Ability to create an unlimited number of workspaces, each containing differing views of available data sources, reports and visual dashboards





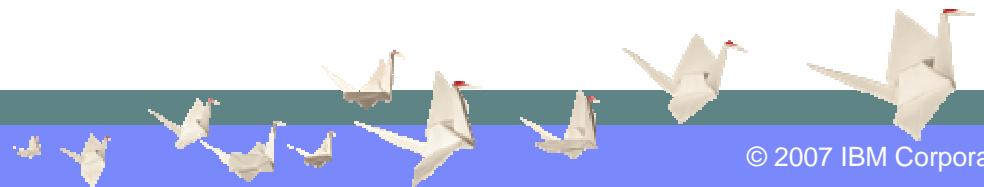
# Backward Compatible with QMF Infrastructure

- Queries, forms and procedures remain object-compatible with prior QMF versions
- Retains full support for QMF Catalogs
  - Ability to create, run, edit and share QMF objects with QMF for TSO<sup>1</sup> and prior QMF distributed products
  - Optionally use resource limits defined in QMF catalogs
- Similar 'database explorer' provides familiar look and feel for prior QMF users
- Built-in ability to import QMF Server Definitions Files (SDF) and QMF Visionary solutions
- Built-in ability to migrate visual reports into the new graphical format



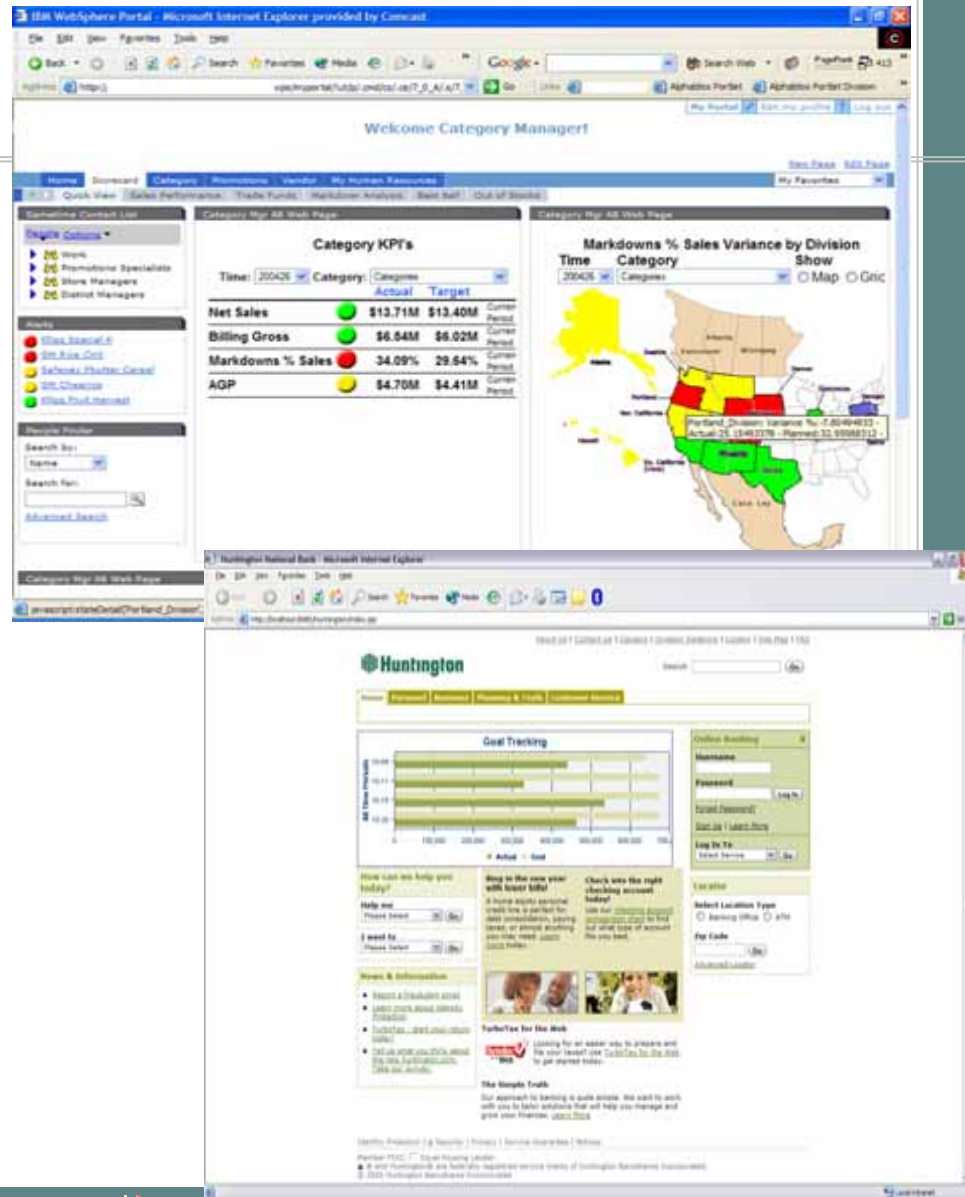
# IBM DataQuant for z/OS V1.1 - 5697-N64

- OTC offering, IPLA product
- Processor pricing -- \$1500/VU
- Pre-reqs QMF Enterprise Edition (either V8 or V9)
- Supports DB2, Informix, and other major relational databases
  - It offers access to DB2 on any platform (including i-series), plus other relational DBs
- DataQuant for WebSphere runs on any WebSphere supported OS
  - Including zOS and zLinux
- Try & Buy available



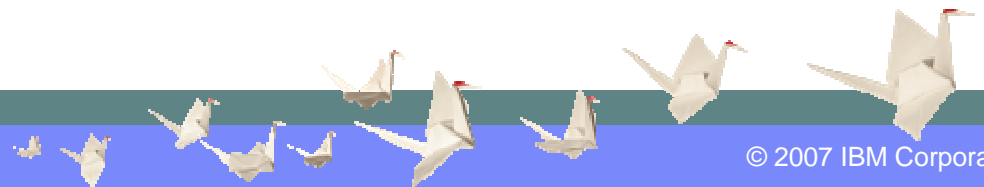
# What is Alphablox?

- Platform for Customized Analytic Applications and Inline Analytics
- Pre-built components (Blox) for analytic functionality
- Allows you to create **customized** analytic components that are **embedded** into existing business processes and web applications

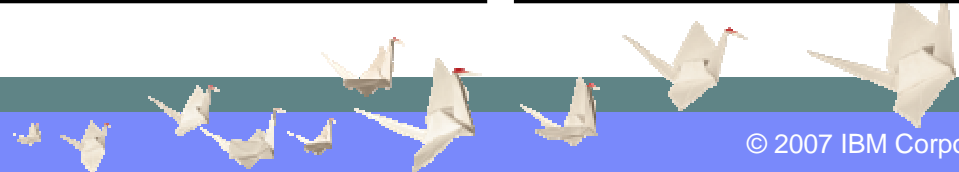
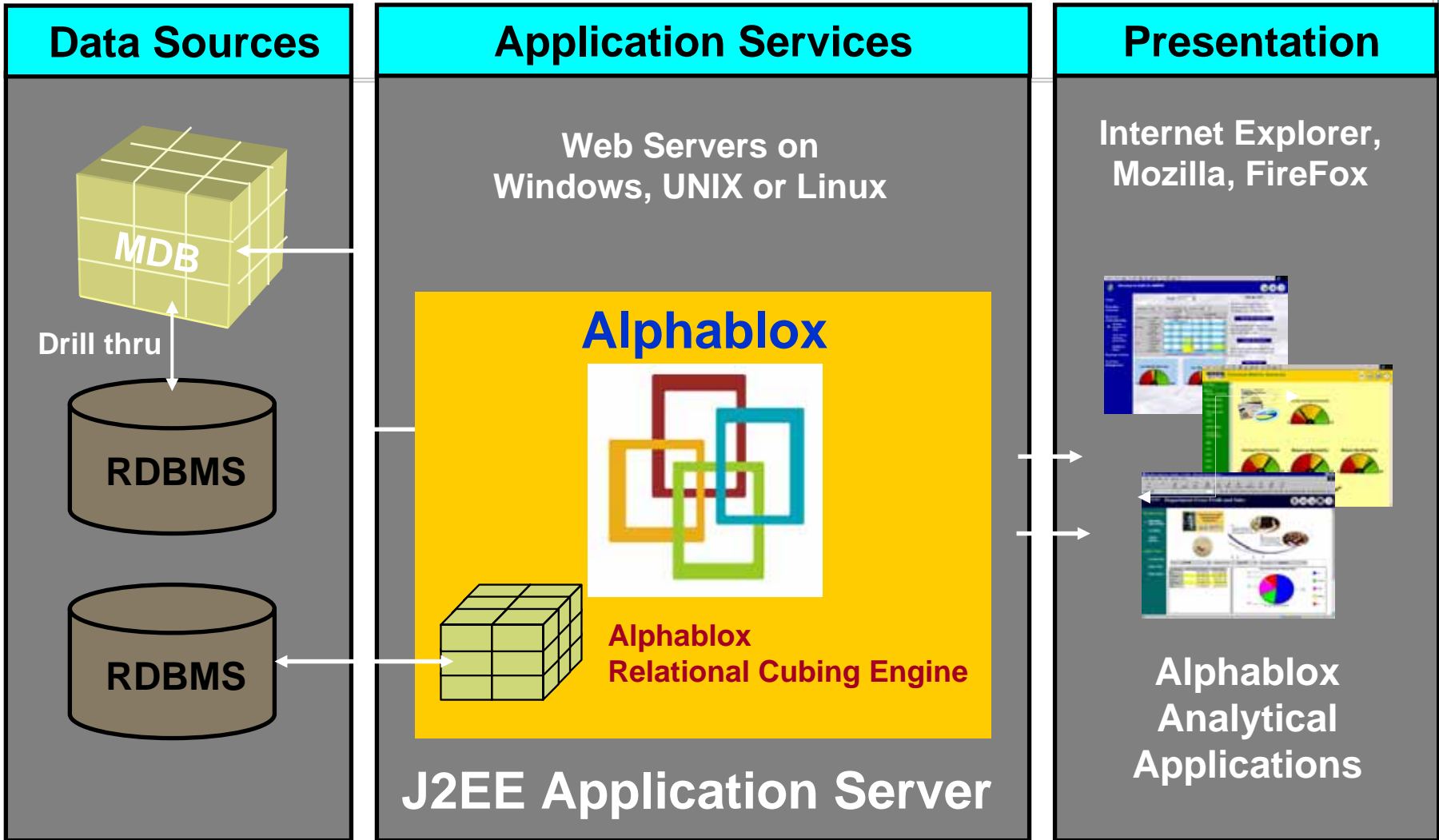


# Alphablox Components

- Blox components, which are modular, reusable components
- An application framework
- A powerful programming model
- ... and a variety of development tools for assembling analytic applications
  
- Run-time environment via standard J2EE application servers
- Can be installed on leading commercial J2EE application servers such as IBM WebSphere® software and others.
- It enhances the end-user analytics functionality, including support for:
  - full DHTML drag-and-drop
  - Histogram charts
  - 80/20 analysis
  - textual traffic lights
  - ... and much more
  
- It can help you and partners maximize the value of information assets by delivering contextual business insight to the right people at the point of decision.



# Alphablox Platform Architecture



# DataQuant / AlphaBlox Positioning

## ■ Where IBM DataQuant fits best

- Where there's a need to distribute data using turn key graphical reports and information dashboards
- Where quick prototyping and rapid development is more important than sophisticated analytical features
- In QMF and/or z-based environments where tracking, governing and z-based deployment are valued factors
- For customers that seek an 'out of the box' packaged BI solution for the development and distribution of query, reporting and dashboard content

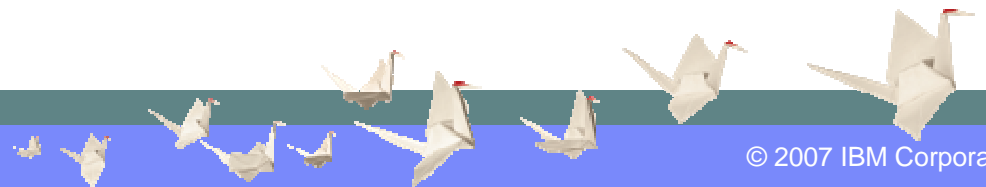
## ■ Where DB2 Alphablox fits best

- Where there is a need for customized analytical solutions that are tightly integrated and embedded within the customer's existing BI infrastructure
- Where "in-line" analytics is required—that is, where analytical application content is embedded in a business process
- For customers that require full control of the solution's appearance and behavior, from data gathering and analysis to the user interface 'look and feel'
- Where there is a need to include sophisticated analytical capabilities
- As a development environment for customized Web applications instead of packaged apps

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# Backup Charts





## Data Warehousing for DB2 on System z – more info

- **Whitepaper** : Why Data Warehousing on System z available on the web <http://www.ibm.com/software/data/db2bi/systemz.html>
- DW on system z – **Demo** available in the Technical Marketing Competence Center, Böblingen, Germany, [TMCC@de.ibm.com](mailto:TMCC@de.ibm.com)
- DW on system z – **Customer Briefings** possible in the Technical Marketing Competence Center, Böblingen, Germany or at Silicon Valley Lab [TMCC@de.ibm.com](mailto:TMCC@de.ibm.com)
- DW on system z – **'Best Practices'** paper planned to be available 2Q2007
- ...

