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Profile

A hands-on senior technical resource with a proven track record for leading complex software development projects through all phases of the development lifecycle to successful completion and implementation.

Understands the business vision, works with the business to build on it with suggested improvements and delivers a result that meets or exceeds expectations. Recently presented with an Achiever Award by CIBC's business unit for contributions in this regard.

Effectively leads development teams through complex architectural and design issues while clearly communicating the impact of technical decisions in terms readily understood by management and the business to ensure all key stakeholders are on the same page.

Extensive experience in financial services performing key roles in projects with CIBC, Sun Life Financial, Bank of Montreal, Dow Jones and OMERS.

James limits himself to work in Toronto and its western suburbs.

Work Experience Summary

Project Roles
Architect (Application & Technical)
Team / Technical / Project Leader
Analyst / Senior Analyst
Developer / Prototyper
Data Modeller

Applications
Financial (Investment, Brokerage, Banking and Pensions, Insurance)
Accounting / Billing
Manufacturing / Distribution / Logistics
Sales / Point-of-Sale / Purchasing
Energy

Development Tools	
Java / J2EE	WebLogic, WebSphere
JSP / Servlets / EJB / JDBC	Eclipse, Sun One Studio
HTML / DHTML / XML	Visual Age for Java
Visual Basic / ADO	JavaScript
Oracle DBMS	PL/SQL
Other RDBMS (MS Access, SQL Server, MySQL)	PowerBuilder / PFC 3GLs (C, PL/1, Cobol)

Case Tools
Rational Rose
Oracle Designer
TogetherJ
Methodologies
Rational Unified Process (RUP)
Agile
Zachman Framework
TOGAF (arch. framework); v9 Certification

Work Experience Details

Co-operators General Insurance, Habitational Insurance, Guelph, Ont. Jul 2009 - Feb 2010 **Senior Analyst and Developer (contract)**

Worked on a project team that transformed two separate businesses previously operating on their own mainframe applications to a combined business running a single web-based packaged (COTS) application for home insurance. Responsibilities included:

- Working with the business experts to understand existing business processes and determine a shared approach that would serve their business needs using the new packaged application
- Documenting requirements for necessary customizations to the packaged application, developing the customized components and then reviewing the customized components with the business team

CIBC Brokerage, Internet Channel Technology, Toronto, Ont. Oct 2006 - May 2009 **Technical Lead, Systems Analyst and Designer (contract)**

Led several major new initiatives including adding a subsystem to accept and process real-time cash transfers, adding subsystems to automatically evaluate /approve equity orders and defining the longer-term migration/upgrade strategy for the CIBC online brokerage applications. Responsibilities included:

- working with the business to define requirements and business Use Cases
- working with related application tech. leads to devise the new subsystem's architecture and high-level design
- leading the effort in designing brokerage front-end and middle tier functionality. This included identifying common functionality and defining Activity diagrams, Sequence diagrams and Object diagrams.
- directing the activities of the design and later the development team
- developing key middle-tier application components

Environment: XML Spy, Java/J2EE, BEA WebLogic, EJB, JDBC, JMS/Messaging, Oracle DB, Sun Solaris, Eclipse IDE, Ant and Rational Clearcase.

Dec 2008: Achiever Award - awarded by the business unit (CIBC's Internet Channel) for offering constructive suggestions to the business during Online Brokerage Release 9.0. First time Internet Channel granted the award to a member outside their own department.

RetirementAdvisor.ca, Toronto, Ont. Aug 2000 - Mar 2009 **Technical Architect, Technical Lead (contract)** (part-time through much of period)

In 2006, took the lead technical role in a 10 month project to create a web-based comprehensive Retirement Planner and Withdrawal Calculator for Sun Life Financial. Responsibilities included:

- working with the client to determine the architecture and tools to be used on the project
- working with the client to define the requirements and then refine them through a series of prototypes
- designing the application and then leading a small team in the development of the tools.

Environment: Java, J2EE, Eclipse, WebLogic, SQL Server, KavaCharts, Altova StyleVision, XML.

Took the lead technical role in developing a one-stop retirement site (live at www.retirementadvisor.ca) . This site lets users perform a range of retirement and financial calculations. Responsibilities include:

- defining the major technologies to use, including choice of web server, operating system and database
- developing the standard model for user interface and business logic components
- developing a series of calculators, including the central "how much to save for retirement" calculator

Environment: Java, J2EE, JSP, Servlets, JavaBeans, Eclipse, Apache/Tomcat, JDBC, HTML, JavaScript, XML.

EDS Canada, Toronto, Ont.
Senior Analyst/Designer, Team Lead (contract)

Worked on projects to build a web-based Fixed Income Trading system, a Mutual Fund Trading system and finally merging a discount brokerage application with a full service brokerage application. Responsibilities included:

- defining requirements using RUP in the form of Business Use Cases and a Business Rule catalogue
- designing middle tier functionality in Technical Use Cases. This included identifying common functionality and defining Activity diagrams, Sequence diagrams and Object diagrams.
- directing the activities of a small analysis/design team and later development teams
- developing and unit-testing application components

Environment: Rational Rose, XML Spy, Java/J2EE, BEA WebLogic, EJB, JDBC, JMS/Messaging, Oracle 8i, Sun Solaris, Eclipse IDE, Sun One Studio/Forte, Ant and Rational Clearcase.

Ministry of Environment, Toronto, Ont.
Technical Architect, Development Team Lead (contract)

Sep 2000 - Dec 2001

Worked on contract as Technical Architect and later Development Team Leader for the Ministry's *environet* project. The *environet* major project involves creating a series integrated web-based applications covering drinking water, groundwater, hazardous waste, air emissions and lab results. Technical architect responsibilities included:

- selecting the major technical infrastructure components including application server (WebSphere vs. WebLogic), IDE (Visual Age vs. WebGain) and Unix Server (AIX vs. Solaris)
- defining the overall framework to be used by the development teams. This included defining the appropriate logic to place in each application layer, which browsers to support, which design patterns to use (Model-View-Controller, Command, etc.), how to handle errors/exceptions in each layer, etc. It also included defining user interface standards, Java coding standards, security framework and general architecture principles.
- directing a small team which created the standard code templates for each major type of object
- developing reusable application components for use across the series of applications. These components included standard presentation tier handling, standard validation routines, message management routines, etc.

Continued as technical team leader for the air emissions project. This application accepted periodic reports from industry on their air emissions. Responsibilities included:

- working with the project manager define the scope of each phase and then helping the business analyst define the requirements
- directing the activities of the 5-person air emissions development team (development team members were divided amongst presentation tier, business logic tier and data tier).
- developing the more complex portions of the application (business logic tier as well as presentation tier)

Environment: Java/J2EE, IBM WebSphere, Visual Age for Java, JSP, Servlets, EJB, JDBC, HTML/DHTML, JavaScript, Messaging, Oracle 8i, IBM AIX and TogetherJ.

Hatch Associates, Mississauga, Ont.
Architect, Senior Systems Analyst, Team Lead (contract)

Apr 1998 - Aug 2000

Worked on contract, filling Application/Technical Architect, Senior Analyst, Team Leader and Developer roles on projects at Hatch.

Union Gas Application Rebuild

Acted as Architect, Senior Analyst and Developer on a team which is rebuilding a large Gas Management application to accommodate major industry-driven functional and technical changes. Duties included:

- defining the architecture for the application (including hardware configuration, support software, development tools and application architecture for both client/server and Internet components).

- analyzing the application (as Analysis Team Leader)
- designing application components including an auto-Email component and a report queuing mechanism
- developing web and client/server application components.

Environment: JavaScript (for IE 4/5, Nav 4), HTML/DHTML, Oracle Web Toolkit, Java
PowerBuilder/PFC, PL/SQL, Oracle Designer, Oracle v7.3/8i, Windows NT, IBM-AIX

**Dow Jones Markets, Toronto, Ont.
Senior Designer, Developer (contract)**

Mar 1997 - Apr 2008

The primary focus was building a financial news application for Dow Jones. Work involved designing and developing applications in PowerBuilder and Oracle.

**SHL Systemhouse Inc, Toronto, Ont. and London, England
Architect, Analyst, Team Lead, Developer (full-time)**

Jun 1987 - Mar 1997

Title was *Senior Consultant*. Positions held on projects in later years included Application Architect, Senior Systems Analyst and Team Leader/Developer. Representative projects (most recent first) were:

Manufacturing Logistics System

- Participated in the planning, analysis, design and development of a large Logistics system. The new technical environment consisted of PowerBuilder Windows NT clients and an HP Unix server running Oracle.
- Led the architecture team during the first release of the new system. Primary responsibilities included:
 - defining the methodology, standards and procedures to be used in the development of the new system
 - facilitating analysis and design workshops
 - building ancestor/reusable objects
 - designing and building early window prototypes for the application
 - working with the Technical Architect in defining the architecture to be used in the new system (e.g. 2-tier vs. 3-tier, Internet accessibility, bridging data between mainframe and Oracle, use of OO techniques)

Environment: HP-UX, Oracle v7, Windows 3.1/NT, PowerBuilder v5, Bachman CASE, SQA Team Test

Client Server Migration of Major Manufacturing Application

- Participated in the successful migration of a large mainframe-based Manufacturing Equipment Maintenance application (500 programs, 300 files, 25 Gb data) into a client-server environment.
- Led a 5 person team through system decomposition, analysis/prototyping, design, development and implementation for a major subsystem.

Environment: HP-UX, Oracle v7, Windows 3.1, PowerBuilder v4, System Architect, Bachman CASE

Other Projects at SHL Systemhouse

Participated on several other projects (generally 3-12 months in duration) while at SHL. Projects included:

- architecture definition for an investment fund management institute
- IT strategy for a small UK bank
- package selection and implementation of a sales/accounting/inventory system for a distributor
- leading a \$500,000 application development project from project definition through to implementation
- design/development of a catalogue keyword-search application for a university library

Environments: Tandem, Windows, IBM AIX, 3GLs (Tal, C, PL/1, Cobol), Informix, MS SQL Server

Sheridan College, Oakville, Ont.

Taught a weekly night class called *Business Concepts for Computers* to 15-25 adults who were working towards a computer certificate.

Education

- 1990 **Masters of Business Administration**, York University, Toronto, Ont.
Obtained an MBA part-time with a specialization in Finance. Chaired an 8-member thesis team – the team studied a firm that provides real-time quotes and trading systems to the investment community. Graduated with an A⁻ average.
- 1987 **Honours BMath in Computer Science** (Economics Minor), University of Waterloo, Waterloo, Ont.
Graduated on Dean's Honour List with an 85% average.

Other Professional Achievements

- Co-author of a two-part ASP Today article about the new J2EE Client Access Services COM Bridge which lets ASP or COM objects access Java objects and EJBs. This Bridge provides a clean solution for tying together the Microsoft Internet technology together with Java 2 Enterprise Edition (J2EE) technology. Readers have rated Part 1 of this article in the top 10% of ASP Today articles. Part 2 of this article was rated in the top 20% by readers.
- Co-authored an in-depth article on SQLJ, an easier way for Java to access relational databases. This was the cover article of the November 2000 edition of Java Enterprise Developer magazine.
- Co-author and technical editor of a book entitled *Building Enterprise Applications using PowerBuilder 6*. The book was published in 1998 by Wordware Publishing. Sections of the book written personally included project management, analysis, object-oriented design and development, efficient coding techniques and database design and development.

References available upon request.