Power To The Pen And IBM i – A Pilot Pen Success Story

Pilot Pen Writes a Prescription for Reliable Change Management

When third-party software packages aren't meeting a company's needs and expectations, IT managers have two choices: keep endeavoring to make the software work, or replace it. Given the expense and effort it can take to change software vendors, it's only natural that IT managers will choose to do their best to make existing software work while hoping that the next set of updates from the software vendor will turn things around.

This was the situation that Bobby Morgan was facing with his company's IBM i change management application. As IT Development Manager at the nationally known writing-instrument company Pilot Pen, Bobby had to make sure that his development team was able to efficiently create and maintain code for the company's custom ERP software. As you would expect, he relied heavily on the company's change management application.

"Despite numerous, ongoing frustrations with our change management application, I really hadn't been actively thinking of replacing it, despite my occasional grumblings to my manager," says Bobby. "At one point my manager forwarded an email to me about the Midrange Dynamics MDCMS change management application that sounded interesting, but I filed it away, hoping we could improve the functioning of our existing application. A few months later, I dug up that email when yet again our change management application threw everything into disarray during the deployment of a new batch of code into production. The process got hung up because of some locked objects, and as was often the case, it was a huge pain to roll everything back. At this point I had had enough. I scheduled a demo with Midrange Dynamics."

Bobby and his manager, John Worthington, Senior Manager of Information Architecture, liked what they saw and decided to do a more in-depth evaluation of MDCMS. It soon became clear that it could resolve many of the chronic issues that their current change management application was causing, so a decision was made to purchase MDCMS and begin the necessary work to make the transition.

A Smooth Transition to MDCMS

One of the challenges that Bobby faced as he began the transition was to accurately migrate and convert the extensive, complex change history that his development team had accumulated over many years. It was critical that this history be accurately migrated to

> "Several weeks after the transition to MDCMS, our Midrange Dynamics rep contacted me a little surprised that neither she nor her support team had heard anything from us since the install. I told her I simply had no reason to call as everything was running fine. My developers and I were doing everything we needed to do without any issues whatsoever."
>
> —Bobby Morgan
> IT Development Manager
> Pilot Pen

MDCMS, both for auditing purposes and so he and his team could go back and compare the history of source members.

"Migrating to MDCMS went really well," says Bobby. "The Midrange Dynamics implementation team understood the complexities of our change history and were very willing to tweak their conversion process in order to ensure all went smoothly. As a result, our migration and product-training processes went off without a hitch. All of our IBM i developers quickly got up to speed, and we easily met our transition timeline. We were happy that it wasn't a monumental feat for us to get over the learning curve and to become productive, which is a testament to the way the product is designed. Case in point is several weeks after the transition to MDCMS, our Midrange Dynamics rep contacted me a little surprised that neither she nor her support team had heard anything from us since the install. I told her I simply had no reason to call as everything was running fine and my developers and I were doing everything we needed to do without any issues whatsoever."

Tight, Reliable Integration with RDi

In addition to MDCMS, Pilot Pen purchased MDOpen so that Bobby and his team could do their development work entirely within the Rational Developer for i (RDi) graphical interface and thus reap the benefits of working in that environment.

"With our previous change management application, there were issues with how it worked with RDi," says Bobby. "They provided a plugin, but I found it to be flaky at best. It was more of a pain to use than just working in green-screen. Of course, if you're working in RDi, you want to avoid going to green-screen as it's more productive to stay in the one development environment, but we had no other option."

"We were very happy to see that the MDOpen application is solid and stable," continues Bobby. "It's a big difference from what I found with the RDi plugin provided by the vendor of our previous application. MDOpen allows us to keep our developers working in RDi, making it easy to check out objects, create new objects

that are assigned to request-for-promotion (RFP) processes, and do everything else that's needed."

RFPs to the Rescue

Speaking of RFPs, Bobby was particularly pleased that MDCMS provided an integrated RFP function that logically assigns objects to programmers who are tasked with a specific portion of code development. This allows managers like Bobby to more easily coordinate the allocation of objects to projects, as well as accurately track permissions and automate communications through each phase of the project. With their previous change management application, Bobby and his team had to do many of these tasks manually and in a non-standardized way.

"It was quite painful to move development processes up to QA and into production," says Bobby. "Objects weren't assigned and grouped together. Plus, we would have to manually send emails to people who had the authority to deploy objects, and that frequently slowed things down and caused confusion."

"With MDCMS, we are able to automatically generate templated emails in a standard format when RFPs are submitted for approval and installation into production," continues Bobby. "We can efficiently go into MDOpen and select the RFP that made the request for code to be put into production and do everything else we need to do, thus reducing communication issues and speeding development processes. Plus, this creates a standardized audit trail that can be easily reviewed by auditors."

Based on an enhancement request from Bobby, Midrange Dynamics provided an added feature to the RFP function that simplified the

process of transferring checked-out objects from one developer to another whenever the need arises.

"We asked Midrange Dynamics for this enhancement and were impressed with how quickly they provided it within a new release of MDCMS," says Bobby. "This feature has been very helpful when we've had to shift around development priorities."

"As we receive each set of updates to MDCMS, it's easy to see that Midrange Dynamics continually enhances the software, making it world class," adds Bobby. "It's clear they're actively expanding the capabilities of the application while delivering a product that's as defect-free as possible. It's great to feel confident about the updates I'm receiving, which is not always the case with other third-party software applications I've used over the years. We have upgraded MDCMS twice since it was implemented, and it's gone very smoothly each time. Compared to our previous change management application, the update process is a breeze."

Enhanced Security and Library Management

Bobby was also pleased with how MDCMS manages development libraries as well as the application of authorities to each object that is moved into production. For the latter, it makes a big difference to have a straightforward way to define object authority templates in MDCMS that are used to automatically apply the necessary authorities to objects during installation. Regarding the management of development libraries, Bobby was impressed

with the logic and simplicity of this function.

"With our previous change management application, it was always a bit confusing and frustrating how the development libraries were handled," says Bobby. "There were a series of libraries that seemed to be a bit convoluted, but with MDCMS, the library designations are very simple and make logical sense. It is very easy to follow the necessary path through libraries."

Seamless SQL Handling

For quite some time, Bobby and his team have been in the process of gradually modernizing the company's DB2 databases so as to gain the many benefits of SQL. As new data objects are created during the course of development projects, developers create them as DDL SQL tables. With his earlier change management application, he and his team would often run into issues with DDL SQL during the rollouts, which in turn contributed to difficult rollbacks, but these issues were resolved with MDCMS.

"I was very happy to see that MDCMS had incorporated the logic necessary to seamlessly handle DDL SQL data objects," says Bobby. "As we move through the development, QA, and production environments, the handling of DDL SQL objects occurs smoothly, which is helping us to facilitate our database modernization efforts. MDCMS creates the DDL objects in the development environment, moves the source to the QA and production environments, and then generates the data
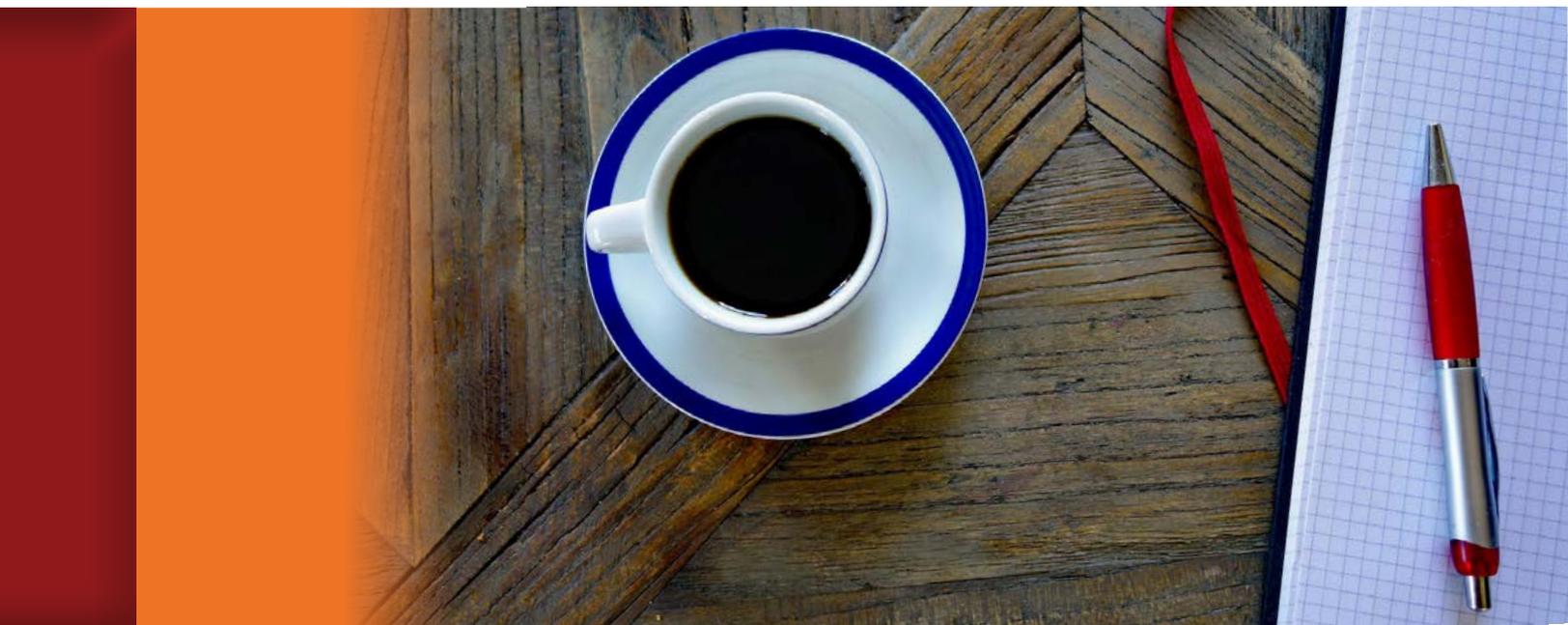
objects on the target at the time of installation to ensure the integrity of the system catalog. I really like that it is a completely seamless process."

Audit Reports That Are Easy to Format

For most companies, accurate, automated auditing processes are critical, especially within change management processes, and Pilot Pen is no exception. In their previous change management application, Bobby's manager, John, had to manually build the audit reports since the application did not provide the reports he needed to satisfy his auditors. The audit reports included with MDCMS proved to be a solid base and, with only minimal modifications, John was able to deliver reports to the auditors in the format they were used to seeing.

Less Stressful Software Deployments

As noted at the beginning of this story, the defining problem that finally compelled Bobby to seek out a more reliable, agile change management application was the cumbersome process of rolling back a software deployment when deployment issues occurred.

"There were many times I would execute a fairly large deployment and our previous change management application would hit an issue and just pretty much stop in its tracks," says Bobby. "When this happened, it would leave some objects in production but then abandon the rest of the changes. As any developer knows, having a half-deployed rollout that's stuck in place without the ability to do a quick rollback is not a good position to be in. Each time this happened, we had to manually undo the rollout—essentially identifying each of the orphaned objects and manually moving them back. It was a painful, stressful process."

"Thankfully, MDCMS handles rollouts and rollbacks far more gracefully," continues Bobby. "Unlike our previous product, if for instance an object is locked, an alert email is instantly triggered that helps us quickly identify and resolve the issue so we can keep the deployment moving forward. And if for whatever reason we can't quickly resolve the issue, MDCMS won't finalize the deployment until all is ready to go. That's a huge improvement for us."

"As we receive each set of updates to MDCMS, it's easy to see that Midrange Dynamics continually enhances the software, making it world class. It's clear they're actively expanding the capabilities of the application while delivering a product that's as defect-free as possible."

—Bobby Morgan

"In addition, the RFP deployment logs are very detailed and extremely helpful in determining and resolving the sparse issues that occur during RFP installations," continues Bobby. "And if we run into an issue that we can't resolve in a timely manner and we need to contact Midrange Dynamics support, they are very responsive. They get back to us quickly and give us solid answers we can use to keep things moving forward. With the vendor of our previous change management application, it wasn't unusual for support responses to be open-ended and unresolved, often leaving us confused as to why the problem occurred in the first place. This was particularly concerning during issues that required a rollback. But that's not the case with Midrange Dynamics. Not only is MDCMS a more reliable and functional change management application, but should we need assistance, they give us fast, clear, and actionable answers."

Interested in writing your own MDCMS success story?

Visit www.md-na.com, book a demo, and get started on the road to reliable change management.