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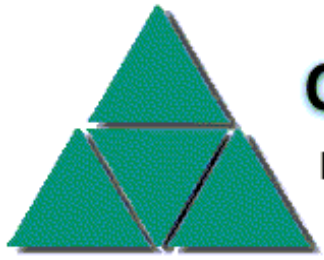
# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**Christopher F. Burns, Sr.**  
**GEMKO Information Group**  
**[cburns@gemko.com](mailto:cburns@gemko.com)**

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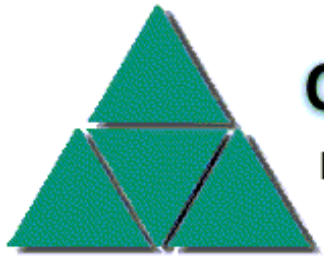
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## Why are we here ?.....

<b>RUNDOWN</b>
<b>Y ASK Y</b>
<b>DRAFT BEER</b>
<b>TED</b>
<b>DYNAMITE</b>
<b>WILE E.</b>
<b>EASTWOOD</b>
<b>ABBY MALLARD</b>
<b>CORRUPTION</b>
<b>500 IT IS</b>
<b>MORE...</b>

- To take back control of our 3<sup>rd</sup> party enterprise applications
- To break the destructive cycle of “bastardizing” these applications based on end user whims
- To learn to reduce the cost and effort associated with future releases, and thus...
- To once again become current with our software, and thus...
- To get more of what we pay for in our software
- Others ?



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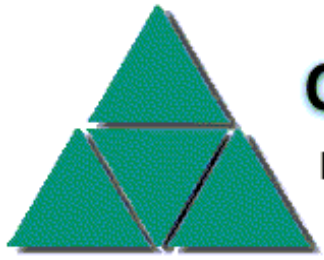
“GTMOH” is a sequel to:

## The Modernization Meal

*a.k.a. “Burgers, Subs & Pumpkin Pie”*



Available via webcast and Local User Groups (LUG's)



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## On tap.....

RUNDOWN

Y ASK Y

**DRAFT BEER**

TED

DYNAMITE

WILE E.

EASTWOOD

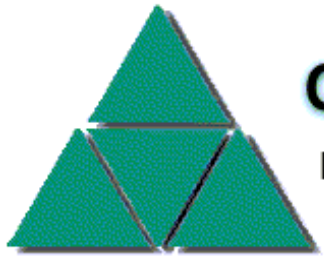
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MORE...

- The story of Ted, the excavation contractor
- The good, the bad and the ugly
- The real cost of modifications
- The journey - a general solution concept
- Quick case study
- Q & A



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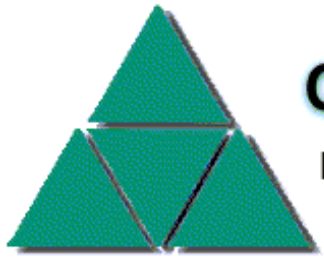
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The story of Ted**



## Meet Ted, the excavation contractor.....

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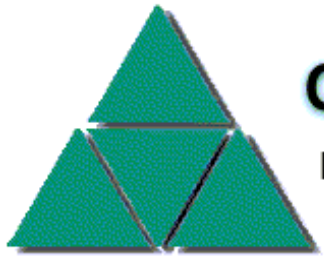
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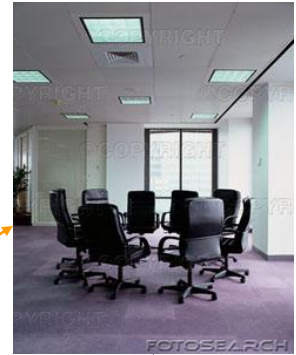


- Self made millionaire
- 60 employees
- \$2.3 million in excavating and blasting equipment
- \$9 million backlog
- Just built his dream summer home near base of mountain
- Office on other side of mountain – only 6 miles away, but 40 minute drive on main roads

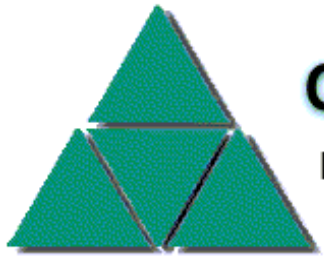


# Ted's daily commute

<b>RUNDOWN</b>
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**26 miles,  
40 minutes**

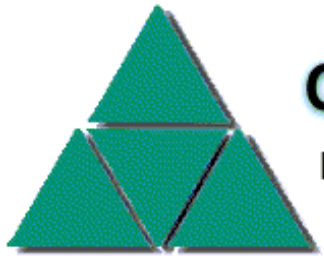


## Ted's rationale.....

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- “This daily commute is too long”
- “I’m a successful man – time is money”
- “What I need is a quicker way to work”
- “A land bridge over the creek and a short cut through the mountains should do the trick”
- “I have the resources (equipment, dynamite, manpower, etc.) to make it happen”
- “I own the land, it won’t bother anyone else”
- “With the time I save, I’ll be even more successful”
- **So Ted blasts and digs, and soon...**





# Ted's new daily commute..

<b>RUNDOWN</b>
<b>Y ASK Y</b>
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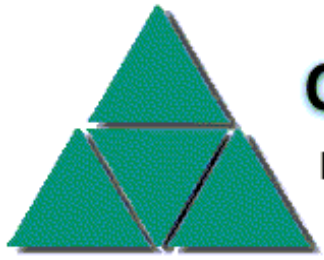


**Ted is happy  
(and successful)**



**6.6 miles,  
11 minutes**





## Shortly thereafter....

- Ted's property floods after just a moderate rain
- Ted discovers packs of coyotes, bobcats and other undesirable creatures wandering on his property
- Ted's family complains of a cold draft throughout the house
- **You see...**

RUNDOWN

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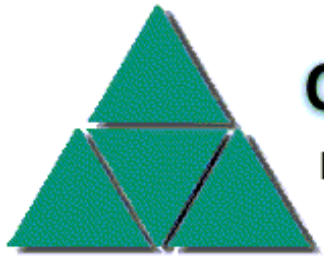
EASTWOOD

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MORE...



# Unforeseen impacts.....

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<b>MORE...</b>

- The creek provided natural drainage, but now has been blocked by a land bridge
- Carnivorous creatures living on the other side of the mountain now have easy access to Ted's property and threaten his 2 dogs
- The new gap in the mountains acts as a wind tunnel and wind now pummels Ted's house
- Everything was there for a purpose, and they worked together in a delicate balance
- Ted disrupted that balance because he had the desire and the resources
- Ted is now stuck with an investment that he will be hard pressed to liquidate
- Ted is no longer happy



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## Moral of Ted's story....

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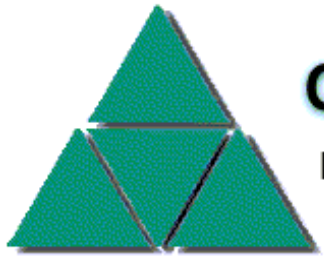
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MORE...

- Software products are designed and constructed a certain way for various reasons. Those reasons may not be readily apparent, but they are not to be taken lightly.
- There is interoperability between the components which make up software products, which should not be taken lightly.
- There are years of design, testing, experience and customer feedback built into these systems. That should not be taken lightly.
- In many cases, the perceived benefit of customizing vendor software does not justify the risk of unforeseen impacts.



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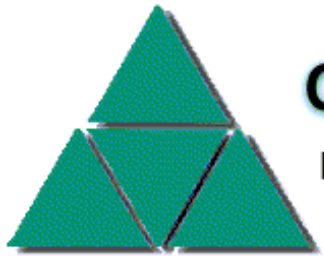
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

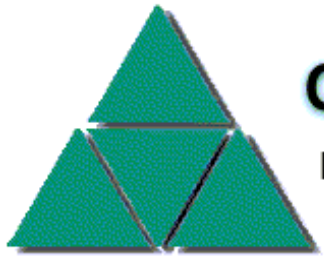
**The good, the bad and the ugly**



## Modifications are good...

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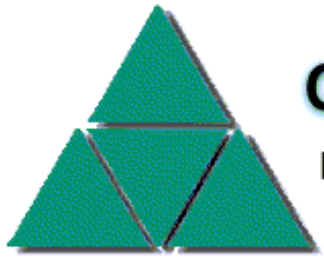
- Bridges the gap between industry standard code and company unique business needs
- Provide feedback to vendors for possible future enhancements
- Help familiarize programmers with functionality of package software



## Modifications are bad.....

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- Can corrupt the integrity of a vendor tested application
- Are not supported by the vendor, and render essential processes ineligible for vendor support
- Each mod adds to the cost and effort of upgrading to a new release, and hence...
- Can discourage installations from keeping current with vendor releases, and hence...
- Can hold back operating system updates, and hence...
- Can hold back hardware upgrades, and hence...
- Can hinder an organization's ability to keep pace with technology, and hence...
- Adversely affect a programmer's skill set, and hence...
- **"Would you like fries with that ?"**

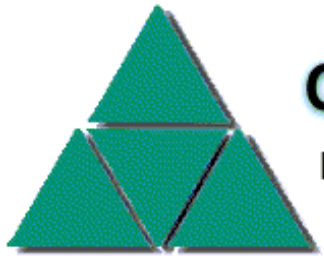


## Modifications are ugly.....

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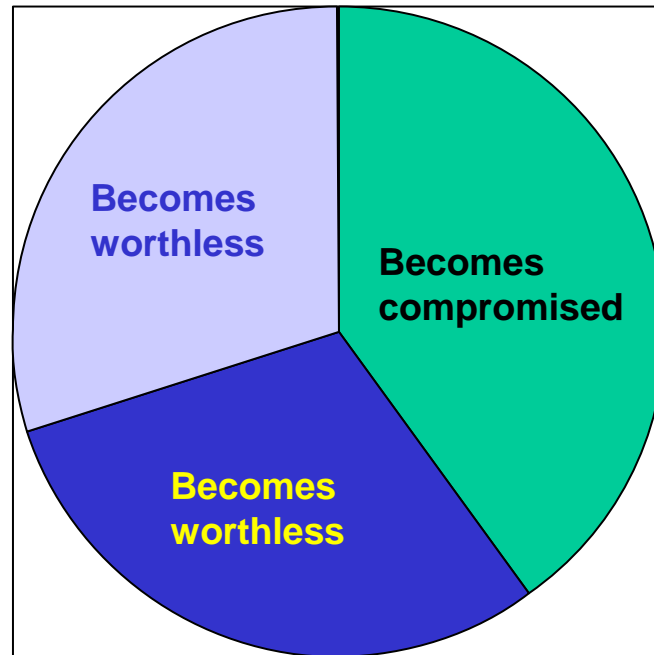
- Most legacy vendor code was not written to be read, let alone changed
- Often written in obsolete programming languages
- Never re-engineered, just patched (by many)
- Well meaning designers made these mods appear seamless, but fail to draw distinction between vanilla and custom features
- Meaningless standards (especially if code generators were used)
- Perpetual change references from old releases
- In many cases are not properly documented
- Other more technical reasons





# But what's really ugly....

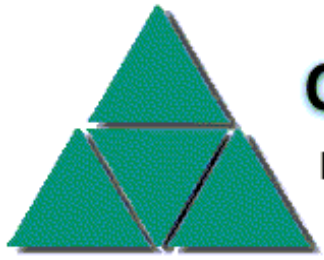
## Life of Software Investments



- Original Purchase (R&D, quality testing, certification)
- Support Contract (Help Desk, fixes, alerts, etc.)
- Annual License (subsidizes new development)

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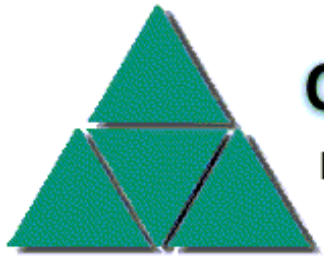
When you bastardize your 3<sup>rd</sup> party application...



## When you bastardize.....

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WILE E.
EASTWOOD
ABBY MALLARD
<b>CORRUPTION</b>
500 IT IS
MORE...

- You lose support for not only the altered programs, but in many cases the processes that call them as well
- You deviate from methods derived from years of research and based on industry experience and input from countless customers
- You corrupt the integrity of programs which were painstakingly tested and certified by the vendor
- You lose value which you are paying for through license fees, support fees, etc.
- **But it's a hard habit to break...**



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VP of Finance

Used to getting his own way



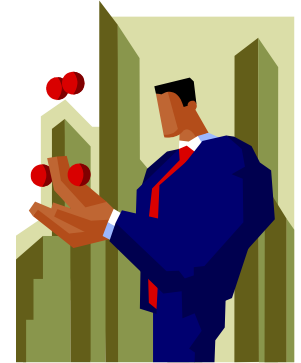
ERP Vendor Rep

“Great – 500 it is”



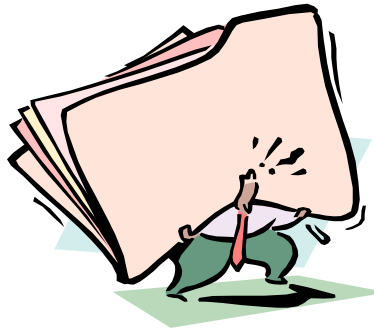
Dept. Manager

“Can’t we just sneak this change in”



IT Manager

“We can’t spend much time on an upgrade”



You !!!



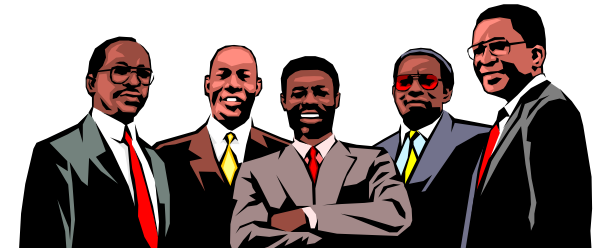
ERP Vendor Help Desk

“You touch it, you support it”



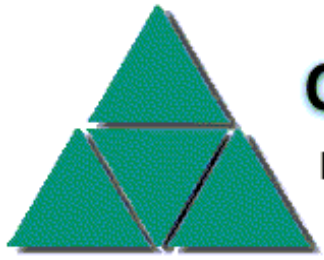
ERP Support Team

“We’re dropping support for version 5.0 in three months”



Sales Team

Excited about new features coming in ERP version 7, out soon



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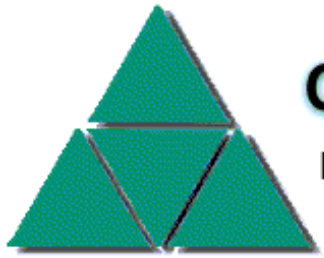
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The true cost of modifications**

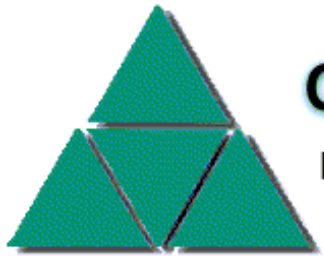


# The real cost of a mod

<b>RUNDOWN</b>
<b>CHA CHING</b>
<b>STEELY DAN</b>
<b>ROLLING STONES</b>
<b>TOM CRUISE</b>
<b>SHOE HORN</b>
<b>97-3</b>
<b>TERM LIMITS</b>
<b>SEX APPEAL</b>
<b>STEVE PERRY</b>
<b>MORE...</b>

<p><b>Analysis Phase</b></p> <p>What objects get changed Where does the code fit Potential side effects</p>	<p><b>Coding Phase</b></p> <p>Editing Compiling</p>
<p><b>Developer Testing Phase</b></p> <p>Creation of test data Repetitive tests Review &amp; Corrections</p>	<p><b>User Testing Phase</b></p> <p>If they even test it at all !</p>
<p><b>Implementation Phase</b></p> <p>Exclusive use Source &amp; object promotion Training</p>	<p><b>Monitoring Phase</b></p> <p>Hold your breath and hope the mod doesn't foul anything up !</p>

**All these phases consume people time**



## But that's not all.....

- 2010's ERP release update – DO IT AGAIN !
- 2011's ERP release update – DO IT AGAIN !
- 2012's ERP release update – DO IT AGAIN !
- Vendor cumulative fix pack – DO IT AGAIN !

The true cost of a mod could be 5 to 10 times the original effort over time – plus intangibles, like loss of support and risk of corruption.

**This needs to be communicated to both the user community and management UP FRONT !!!**

RUNDOWN

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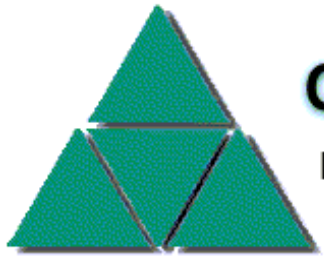
97-3

TERM LIMITS

SEX APPEAL

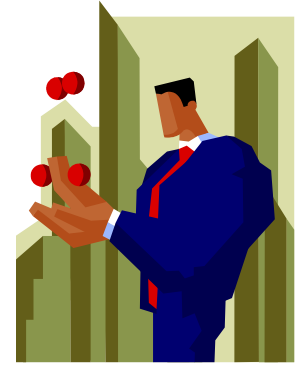
STEVE PERRY

MORE...



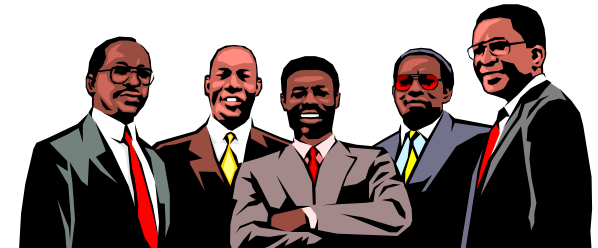
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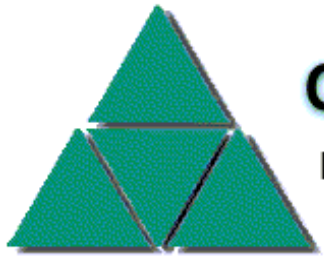
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Will that satisfy everyone ?

Probably not – the onus is still on you !





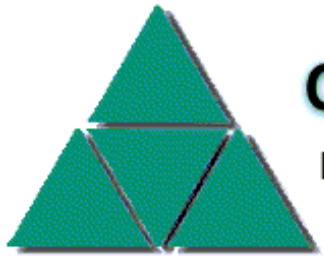
# Our Mission

(should we choose to accept it).....

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<b>STEVE PERRY</b>
<b>MORE...</b>

- Deliver enhanced functionality to end users, provided it has valid business case
- Enforce our business rules (even those that conflict with vendor software)
- Stay current with OS and vendor software releases (which we are paying for)
- Reclaim software support privileges
- Keep our technical skills moving forward
- Achieve the above without modifying the vendor's code

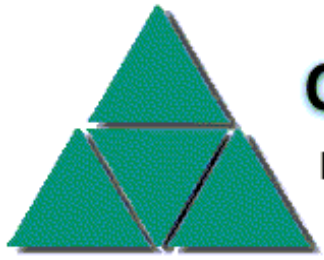




## Three possible options...

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<b>STEVE PERRY</b>
<b>MORE...</b>

- Keep shoe-horning mods and make the problem even worse than it is. Hopefully you will have moved on to your next job before it hits the fan.
- Consider more training from ERP vendor – perhaps the desired function can be achieved with what is already there, or in a future release. Often goes unexplored.
- **GET THOSE MODS OUTTA HERE !**  
Develop them once. Develop them external to the vendor's code. Maybe not even develop them at all !



## Burns's 97-3 Rule.....

97% of your modifications are made to satisfy any of 3 specific needs:

- To alter how data is written to disk
- To alter how data is displayed on a screen
- To alter how data is printed

These needs represent “Impact Points” – the instances at which users come in contact with data – identifying them will be key.

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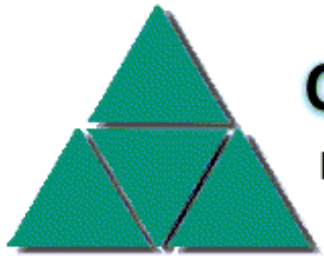
97-3

TERM LIMITS

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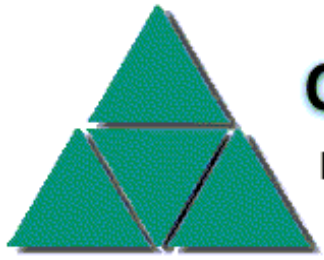
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
A General Solution Concept**



## Term: Modernization.....

- Using your existing resources (technology and process) more effectively to improve throughput.
- This empowers an organization to increase revenues and/or reduce costs, which improves the bottom line.
- Taking advantage of investments you have already made and assets you are entitled to.
- Realizing constant flow of benefits through small, staged improvements.
- Leveraging each benefit in pursuit of the next.
- Minimizing end user and process disruption.
- Protecting the investment in improvement.

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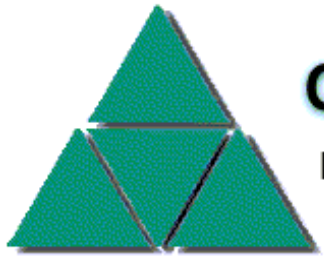
97-3

**TERM LIMITS**

SEX APPEAL

STEVE PERRY

MORE...



## Term: Externalization....

- Methodology to reduce or eliminate customizations to 3<sup>rd</sup> party application programs, through best practices and more effective use of technology.
- Provides ample, equivalent custom function without the need to alter 3<sup>rd</sup> party source code.
- Uses the latest software features native to iSeries, without requiring additional products.
- A form of Modernization because it yields many staged benefits and minimizes risk.

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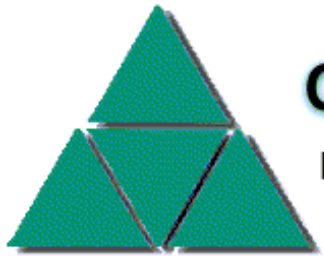
97-3

**TERM LIMITS**

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## Important to remember....

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<b>MORE...</b>

- Many had a hand in creating the problem, and many must have a hand in solving it as well.
- Externalization is not an MIS project, it is an enterprise project. Without this understanding the project is likely to fail.
- Since Externalization is a form of Modernization, it has many small steps, each with its own deliverables which provide value and protect the investment against interruption.
- Since we modernize to help improve our bottom line, decisions must be made based on business value, not emotion or sex appeal.



## Externalization is a special kind of modernization.....

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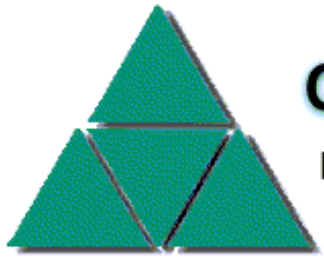
**Bastardized 3<sup>rd</sup> party applications are fat, greasy and generally unhealthy, even though they might taste good.**

**Externalized 3<sup>rd</sup> party applications are lean, mean and promote good health. They are an acquired taste.**



**The right mix of ingredients, cooked with TLC, will produce tasty results that will serve many hungry users.**

**Therefore, it too is a journey, not a destination**



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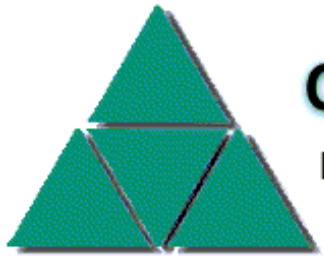


# Get Those Mods Outta Here

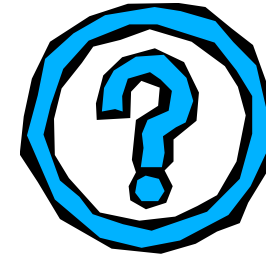
*a.k.a. "Modzilla"*

**The Journey:  
Answer the question "Why ?"**



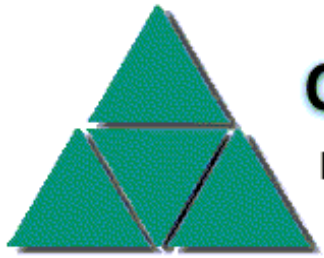


# Answer the question, “Why ?” .....



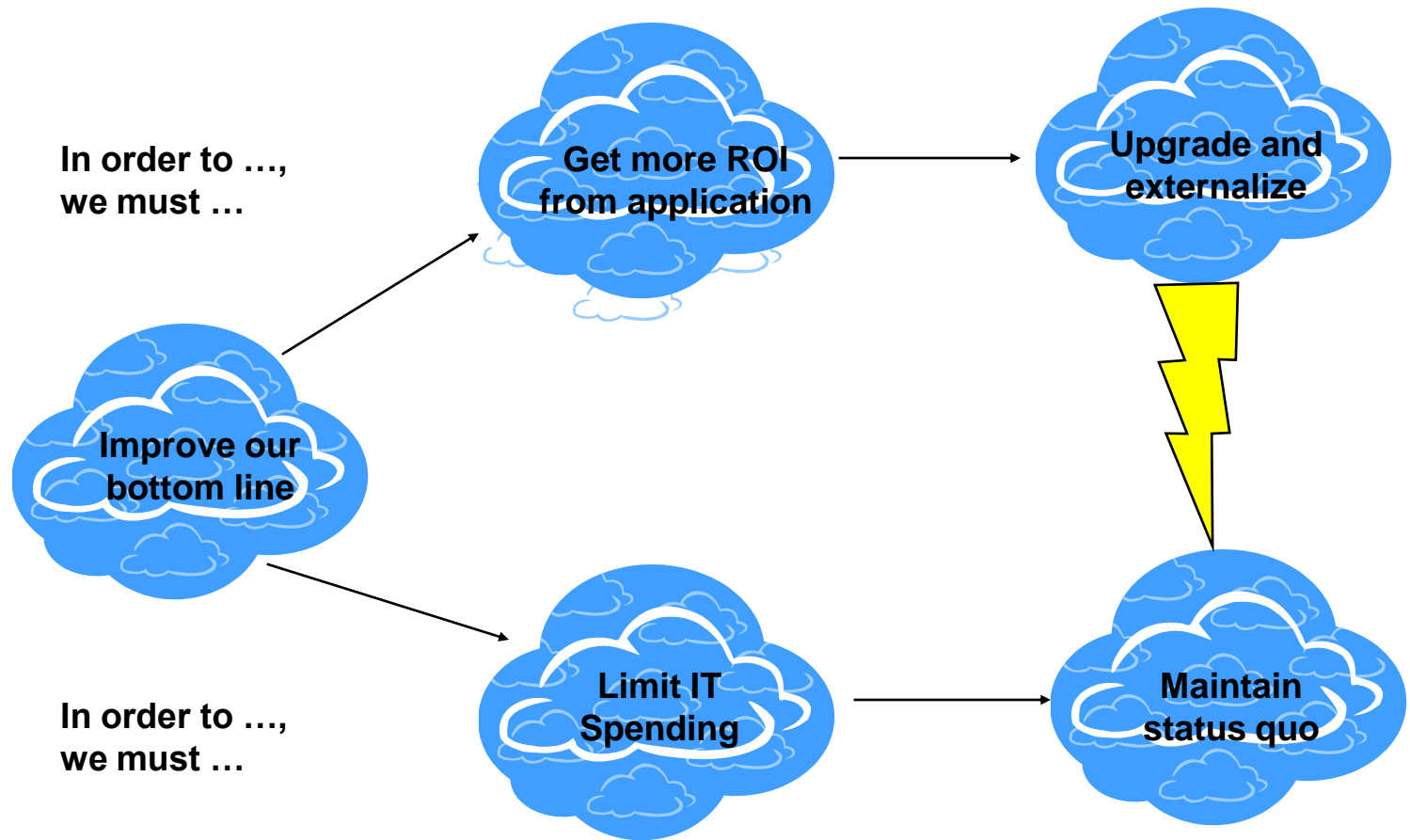
RUNDOWN
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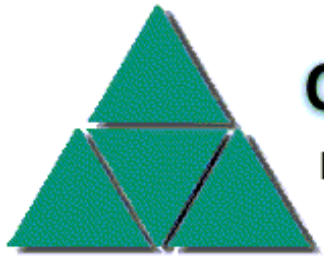
- Outline the scope of the customer’s challenge
- Explain the TRUE cost of modifications
- Explain the many ingredients of modernization
- Importance of education
- Importance of company-wide involvement
- Discuss expectations
- **Solve conflict cloud...**



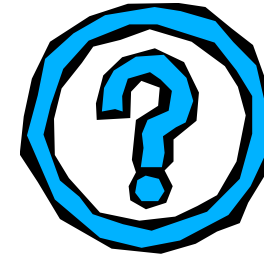
# The conflict cloud

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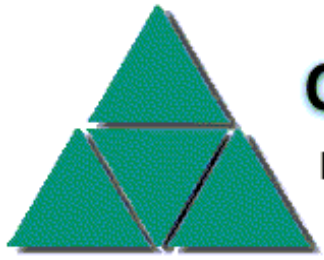
# Answer the question, “Why ?” ...



## Deliverable:

- A clear understanding of why modifications should be externalized and what effort will be required by what people to make it happen, now and in the future.
- An understanding of the mindset and commitment required by the user community and management to ensure a fruitful journey.
- A better understanding by GEMKO and the customer of each other

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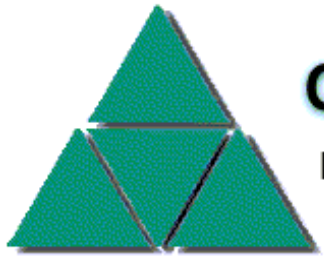
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
Take Inventory**

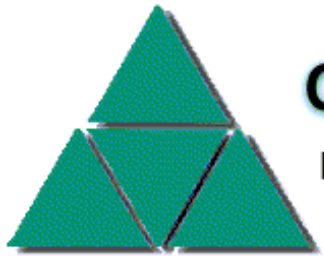


# Take inventory.....

Catalog all known (or even unknown modifications), including:

- Program ID or other object name
- Date created
- Requesting user, or “owner”
- Detailed description
- Initial comments (based on experience)
- Flags and categorizations (for analysis)
- **Sounds obvious, but often neglected**

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# Take inventory....

## Deliverable:

- A documented catalog, in database format, of said modifications. A mechanism for progress tracking, resource assignment and strategic recommendations.
- Queries to mine this catalog.
- Better understanding by GEMKO of the customer's software environment

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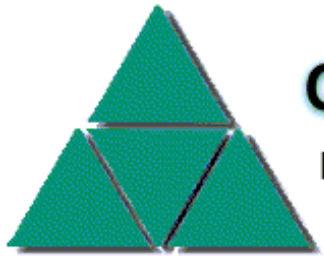
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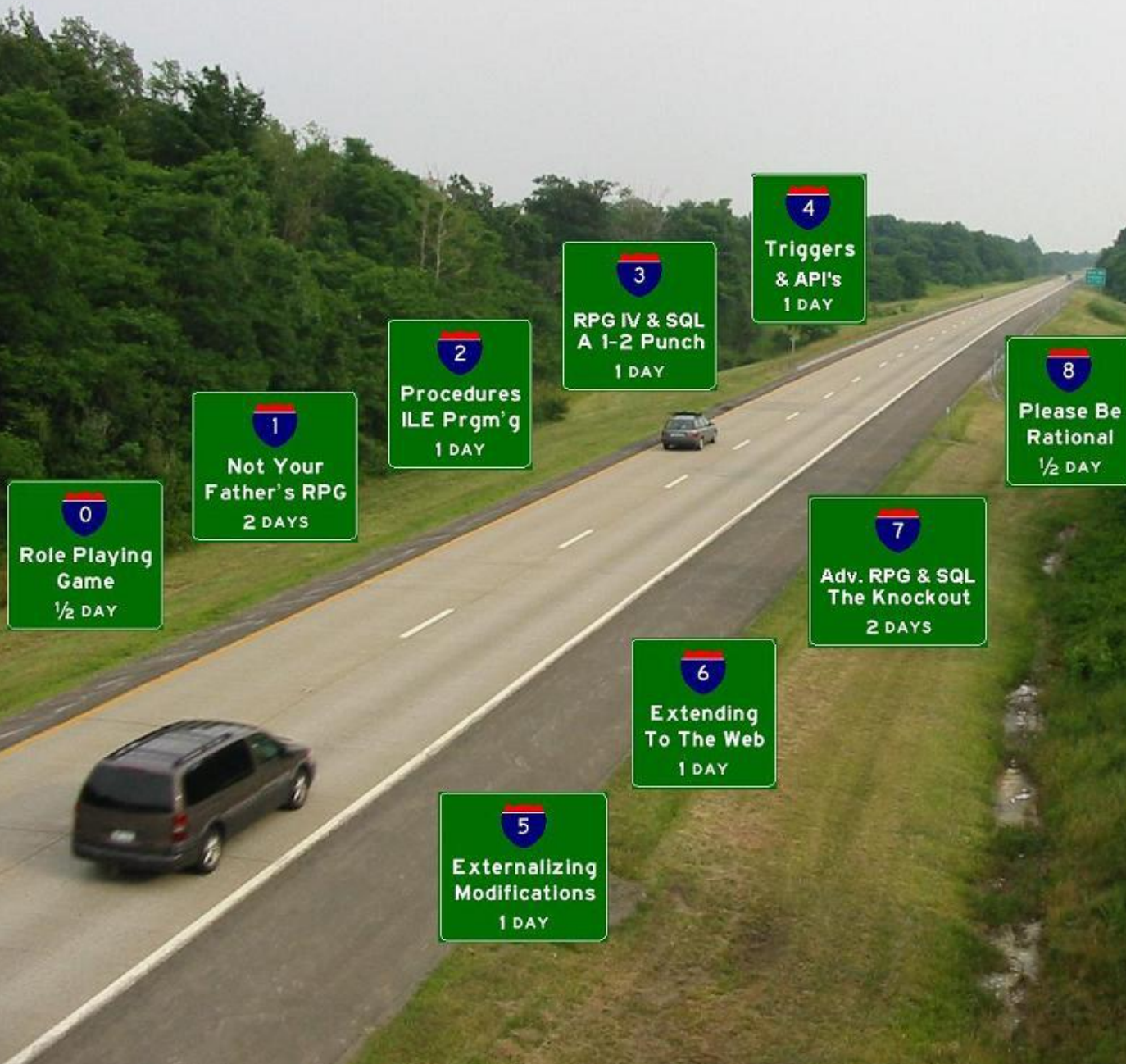


# Get Those Mods Outta Here

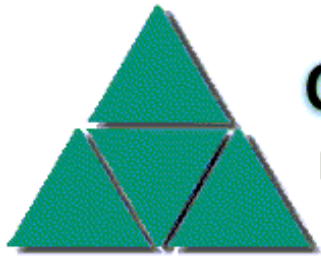
*a.k.a. "Modzilla"*

**The Journey:  
21<sup>st</sup> Century Developer Training**

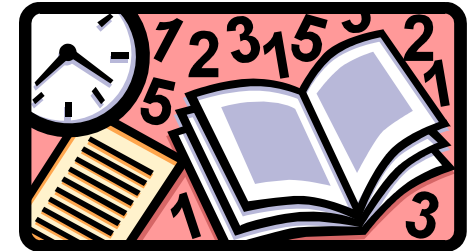
# 21st Century Midrange Developer Roadmap







## 21<sup>st</sup> Century Midrange Developer Training.....



Intense, hands on workshops covering skills on which externalization techniques are based

- Track 1 – Not Your Father’s RPG (2 days)
- Track 2 – Procedures & ILE Programming” (1 day)
- Track 3 – SQL & RPG, a 1-2 Punch (1 day)
- Track 4 – Triggers & API’s (1 day)
- Track 5 – Externalizing Modifications (1 day)
- Others deemed of value
- **Vital to self sufficiency, and to ensure that best technical practices are followed going forward**

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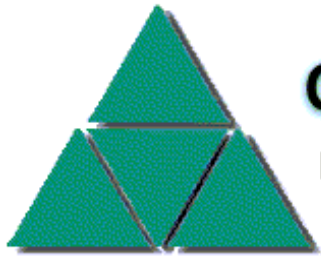
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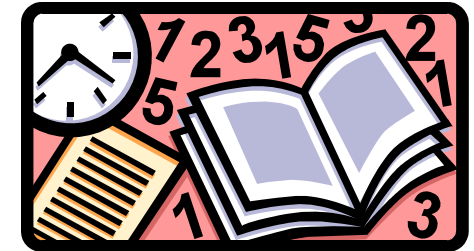


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## 21<sup>st</sup> Century Midrange Developer Training..



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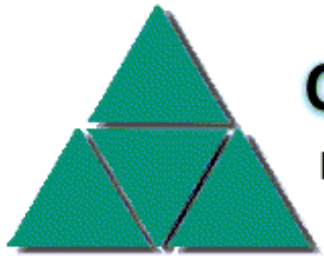
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### Deliverable:

- An intense, hands on education focused on the technical foundations to be used for externalization.
- An overall empowerment of the development staff to support the externalized applications and greatly improve their productivity going forward.



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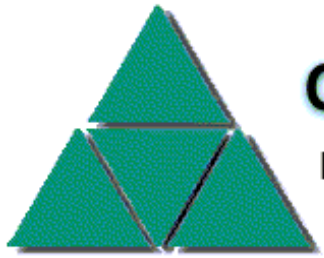
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
Take ownership and justify**



# Take ownership and justify.....

Using the catalog of modifications created previously, provide justification and make hard choices:

- Every modification must have an owner. Even if the original requester has moved on, somebody must assume ownership. No owner, no modification.
- Dear owner: What is the business case ?
- Can a tangible benefit be identified ?
- If so, is it worth the “true” cost ?
- H.A. plays a key role here.
- **Every “owner”, from the CEO right on down to the deputy toilet scrubber, must make a valid business case. Nobody is excused.**

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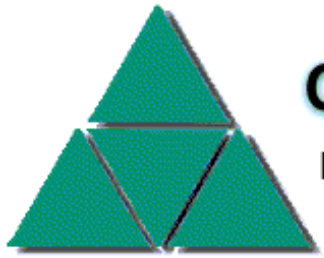
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# Take ownership and justify.....

The following are NOT valid business cases:

- “Because I’m the Vice President, that’s why”
- “It looks so much prettier that way”
- “That’s the way our old system used to do it”
- “Fred must have had a reason back in 1993”

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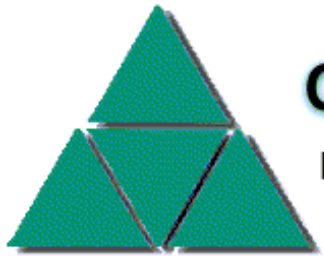
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# Take ownership and justify.....

## Deliverable:

- A more concentrated and consolidated list of mods.
- A better understanding of their value.
- Documented ownership.
- Hard choices that should have been made long ago.
- Additional clarity for GEMKO about customer needs

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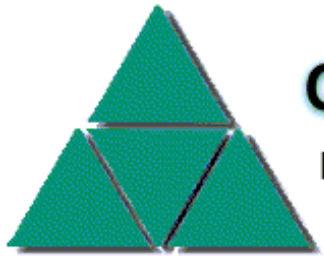
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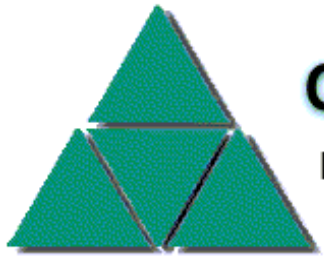
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
Formulate recommendations**



## Formulate recommendations.....

Using the catalog of modifications, make a technical and/or procedural recommendation to provide ample equivalent custom function:

- Through use of new native functions
- Or better use of existing native functions
- Through state of the art, event-driven techniques
- Through “single impact point” methodology
- Through ancillary custom processes
- Identifying business rules and critical database events
- Determine whether mods can be sufficiently externalized on the current software release

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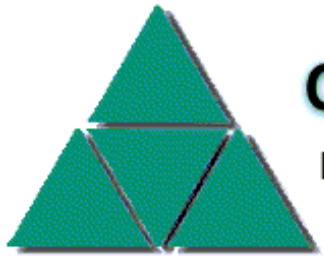
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## Formulate recommendations...

### Deliverable:

- A realistic strategy for each modification, documented in the mods database – effectively a “playbook”.
- A potential reduction in the “go live” impact if a portion of the modifications can be externalized in the current release

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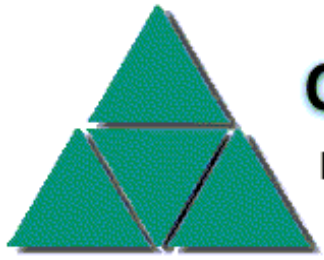
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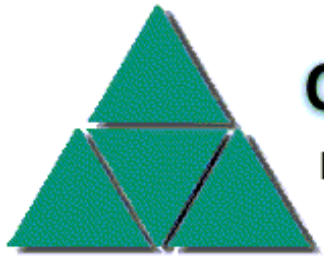
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
Perform Externalizations**



## Perform actual externalizations.....

Using the catalog of modifications, follow technical recommendations and execute, documenting progress in mods database:

- Construct ILE project framework
- Construct utility and support objects
- Construct reusable business rules
- Apply single impact point modifications
- Create database events
- Repopulate database fields where necessary
- Configure native functions
- Unit testing

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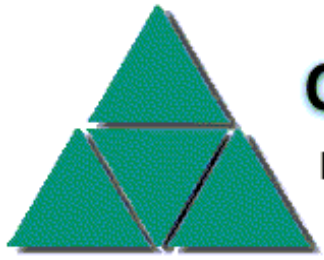
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# Perform actual externalizations.....

Who is involved in this phase ?

- Customer's newly trained IT personnel
- Customer's software partner staff, subject to similar GEMKO training
- Limited GEMKO resource where appropriate
- GEMKO to routinely inspect and critique these efforts to ensure they conform to the playbook recommendations and prescribed technical standards
- Helps ensure that the Customer and their local partner are empowered to support the application in the future

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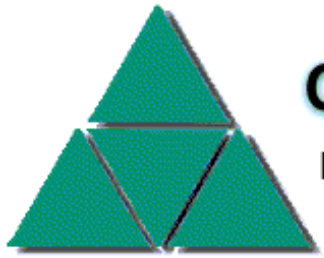
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## Perform actual externalizations....

### Deliverable:

- Modernized, streamlined technology providing equivalent function to sufficiently meet customer needs, per business case.
- A toolkit of reusable business rules to support future development.
- Practical hands on experience for customer's IT staff using new skills

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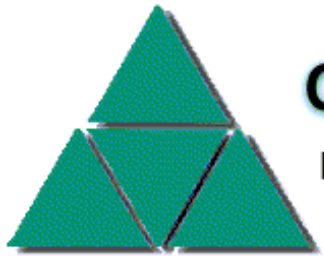
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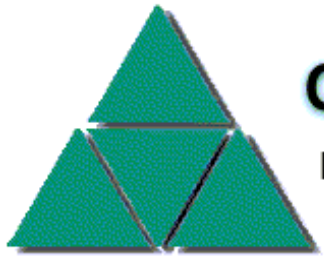
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# Get Those Mods Outta Here

*a.k.a. "Modzilla"*

**The Journey:  
General testing**



# General testing.....

Validate ALL standard operating procedures:

- Transaction entry/posting (all functional areas)
- Supply chain processes (purchase order, work order, sales order, etc.)
- Reporting and inquiries (all functional areas)
- Day end, period end processing
- Physical inventory
- Log and prioritize all issues
- Entering one predictable transaction does not constitute a test. Be thorough, be ruthless.
- **When you ASSUME “it’ll be fine” ...**

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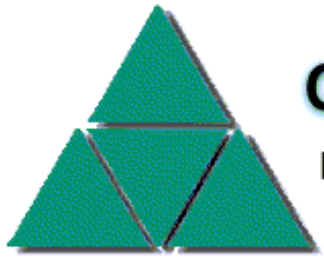
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## General testing...

### Deliverable:

- Quality and feasibility assurance for all externalized modifications
- Familiarity with new native enhancements.

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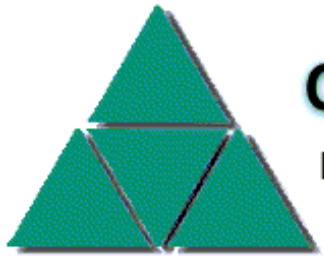
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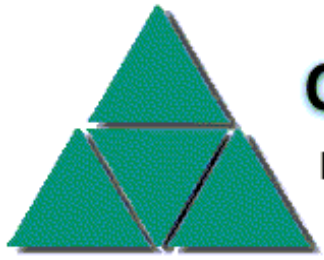
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**The Journey:  
Live Implementation**

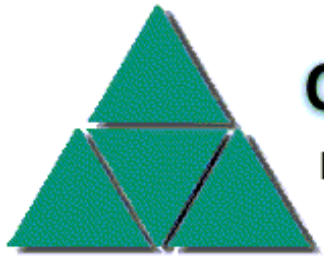


# Live implementation.....

Following 3<sup>rd</sup> party software upgrade guidelines:

- Perform data conversions / updates
- Repopulate database fields where necessary
- Apply new database events
- Environment updates (user profiles, job descriptions, system values, etc.)
- Immediate post implementation support
- Fail safe is vanilla software functionality

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<b>TOILET DUCK</b>
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<b>Q &amp; A</b>
<b>THANKS</b>
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# Live implementation..

## Deliverable:

- Fully functional live environment under new software release with externalized mods

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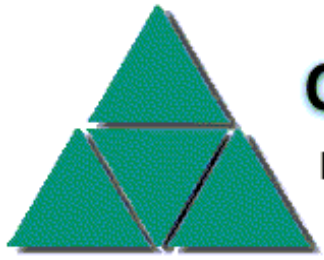
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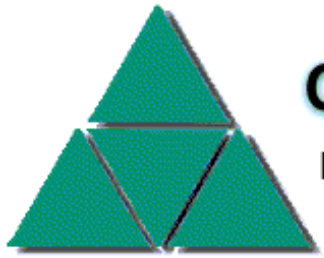
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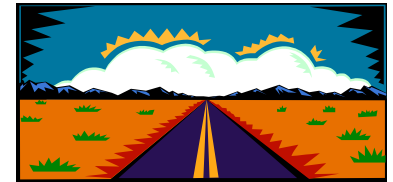
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**The Journey:  
Going forward**



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## Going forward.....

Customer has been empowered to support existing mods and properly implement new ones.

- Every requester (from CEO to toiler scrubber) must provide a valid business case. No case, no mod. Period.
- Look for native process first – tap software support, user groups, web sites, etc.
- If that fails, use 21<sup>st</sup> century methods to craft equivalent function without altering 3<sup>rd</sup> party code.
- If no known methods fit the situation, identify a single impact point – the instant where user meets data.
- Catalog everything – otherwise it will come back to haunt

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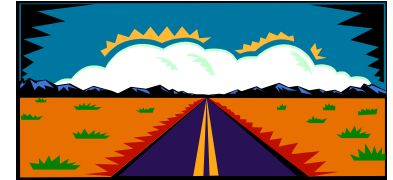
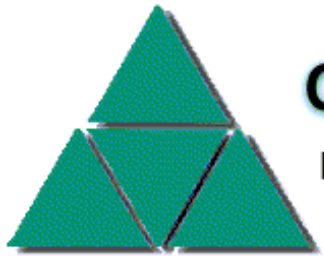
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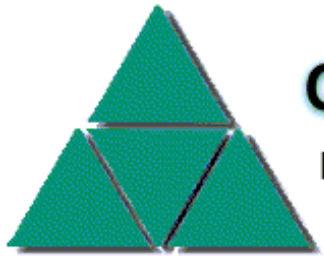


# Going forward.....

## Deliverable:

- The freedom to enjoy the best your 3<sup>rd</sup> party application has to offer
- The peace of mind of a certified quality product and phone support to back it up
- The ability to focus on new IT projects instead of repeating past projects
- An overall better return on your software investment

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# Get Those Mods Outta Here

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**Quick case study**



## Case Study.....



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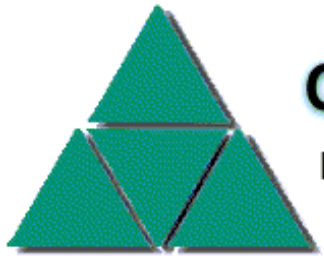
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Manufacturer of automotive security products. Heavily modified ERP, 6 years out of date. Pains included:

- Silos of inventory data for granularity not available in ERP. Scores of modifications made to synchronize these silos, with frequent inconsistencies. Resulted in unpredictable supply chain calculations.
- Constant firefighting associated with data silos.
- Cost prohibitive EDI interface – very risky to engage new partners without affecting existing ones.
- Ineligible for support for critical supply chain programs.
- Unable to implement desired new product options because of their outdated software version.





## Case Study.....

Externalization process included:

- Using native inventory functions more creatively to eliminate the need for silos.
- Building a rich repository of reusable business logic so that rules are applied uniformly across the entire application.
- Combining enhanced EDI features with better programming practice to shield partner specific customizations from those of other partners.
- Many other streamlining tasks

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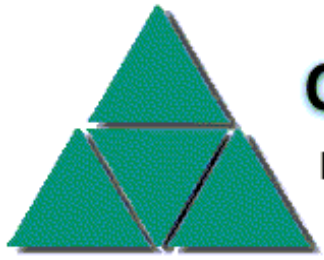
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## Case Study.....

Benefits included:

- 84% reduction in the number of modified objects.
- Complete native audit trail of inventory at the desired level of granularity, with no silos.
- Much simpler process to embrace new EDI trading partners, at no risk to other partners.
- Robust toolkit to support new projects.
- Ability to recapture vendor support.
- Ability to implement future versions in days instead of months.

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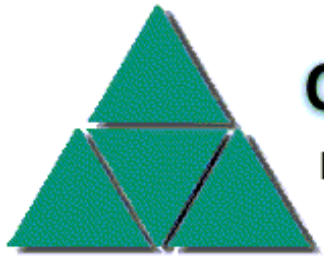
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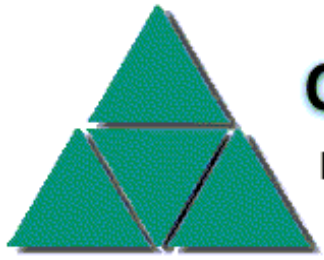
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# Questions ?

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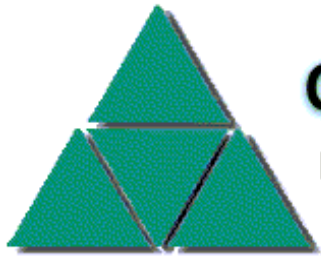
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**Thank you for attending !**

**Christopher F. Burns, Sr.**  
**GEMKO Information Group**  
**[cburns@gemko.com](mailto:cburns@gemko.com)**



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