PROJECT IMPLEMENTATION REVIEW

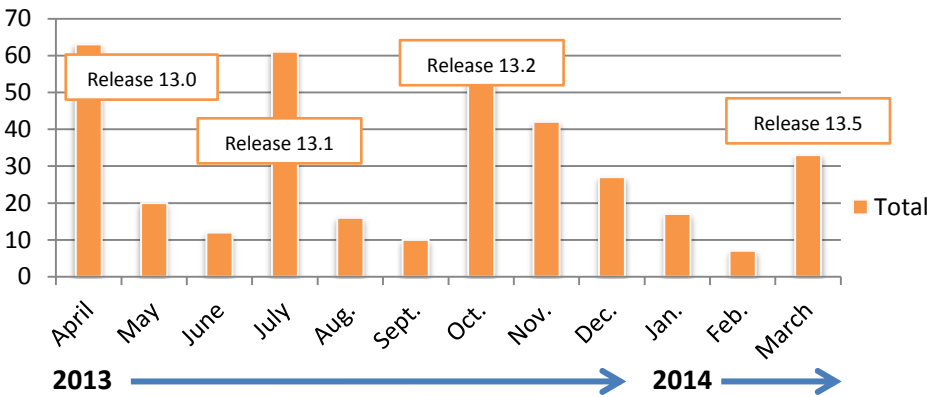Prepared by: Esteban Camargo   April 25, 2014

The purpose of this document is to review the implementation of projects within the CU*Answers software development life-cycle. For the purposes of this analysis, projects implemented are separated into two primary categories: **fixes** and **enhancements**. They are then broken down further into the following subcategories:

- General fixes – credit union driven corrections; information is available on Monitor
- Internal fixes – projects generated internally to correct back-end issues and clean-up programs; information is not available on Monitor
- Data cleanup – projects related to organizing data, removing outdated terminology, and old/bad data
- General enhancements – primary category for general software enhancements or new features added
- Enhancements for Operations and Self-Processors – back-end features added to improve user experience and software functionality for the CU*Answers Operations team, Self-Processors, and partner organizations (CU*NorthWest, CU*South, SITE-FOUR)
- Internal enhancements – new/updated software features to assist CU*Answers programming/operations staff with job completion
- Presentation changes – format changes to software or output appearance
- User error safeguards – screen edits and process modifications to prevent errors
- Performance improvements – improved software functionality to increase processing efficiency
- Updates for regulatory change – changes stemming from regulatory updates (5300, FinCEN, etc.)
- Updates for vendor changes – projects related to required updates by vendors (EFT, shared branching, indirect lending, etc.)
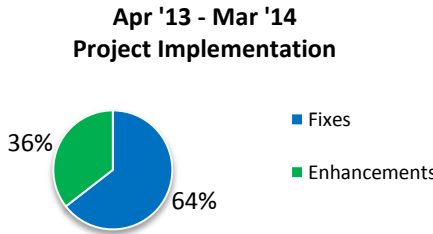
TOTAL PROJECTS IMPLEMENTED

Since April 2013, CU*Answers has implemented a total of 369 projects, which does not include custom programs and conversions.

Here we can see that months of major software releases saw the most projects implemented by a large margin. Below, release vs. non-release months are looked at more closely.

FIXES VS ENHANCEMENTS OVER A NINE-MONTH PERIOD

Since April 2013, roughly two thirds of projects implemented have been categorized as general fixes, internal fixes, or data cleanup.

**Apr '13 - Mar '14
Project Implementation**

■ Fixes
■ Enhancements

36%
64%

PROJECT IMPLEMENTATION TRENDS IN RELEASE AND NON-RELEASE MONTHS

As indicated above, 369 total projects have been implemented since April 2013. Of those, 252 (68%) have been implemented on months of CU*BASE releases. This represents an average of 42 projects implemented during those months.
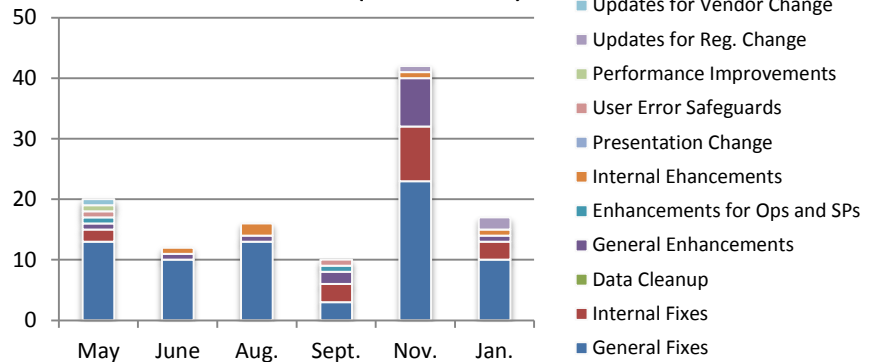
The remaining 117 projects (32%) were implemented during non-release months; an average of 19.5 projects per month. Not surprisingly, a greater percentage of projects implemented during these months (76%) were projects related to fixes. By comparison, release months saw a rate of roughly 59% of projects as fixes.

The biggest indicator that the File Expansion Project has impacted project implementation is the drop off in the number of projects implemented in releases after October 2013.

March 16 marked the first conversion of a CU*Answers credit union to the FEP version of CU*BASE. Leading up to that point, project implementation fell off rapidly as work was completed to prepare for the move.

Projects Implemented During Non-Release Months
(Last 12 months)

Legend: Updates for Vendor Change, Updates for Reg. Change, Performance Improvements, User Error Safeguards, Presentation Change, Internal Ehancements, Enhancements for Ops and SPs, General Enhancements, Data Cleanup, Internal Fixes, General Fixes

Projects Implemented During Release Months
(Last 12 months)

First FEP Conversion

Legend: Updates for Vendor Change, Updates for Reg. Change, Performance Improvements, User Error Safeguards, Presentation Change, Internal Ehancements, Enhancements for Ops and SPs, General Enhancements, Data Cleanup, Internal Fixes, General Fixes

This was followed by five more conversions to FEP in April. As the programming team works hard to correct reported issues and move toward non-beta release of FEP, project implementation is expected to slowly increase. However, with the majority of programmers dedicated to prepping for FEP, clients will likely continue to see only small releases. This is coupled by the fact that for each project, it must be programmed for both FEP beta clients and those on the ING version of CU*BASE.