

The Software Development Life Cycle

Understanding the CU*Answers Development Factory

What is the SDLC?

The SDLC documents rules and procedures for approving, tracking and communicating the status of software development as it moves through the CU*Answers production “factory” – from initial request all the way through to final implementation for clients.



- The SDLC allows us to respond more quickly and more effectively on how CUSO resources should be spent for software development.
- We welcome the scrutiny and responsibility that comes with our transparent approach.
- A proven set of guidelines allows us to say ‘no’ if a decision does not make sense for a project. That said, just because a decision does not fit in the moment, it doesn’t mean we cannot revisit it in the future.
- The same due diligence is applied to formal decisions and off-the-cuff decisions.

General Goals

- Record software warranty issues and provide resolution in a timely manner.
- Obtain approval of development projects that will assure prudent and consistent management of software.
- Provide communication between CU*Answers teams to report software issues and provide feedback on management decisions.
- Provide a researchable database for development projects in progress.
- Assure that proper billing for custom projects is completed accurately and in a timely manner.
- Make a promise to our clients and the marketplace about our overall approach to software development.

Who Manages Our Assembly Lines?

- **The Product Team** meets on a regular basis to discuss project status, deadlines and contractual commitments.
- **Quarterly Strategic Planning** sessions are held on a quarterly basis, with a focus on reviewing priorities and status for current and upcoming quarters.
- **Day-to-Day Administration** ensures that status reports on any individual projects are readily available to CU*Answers staff. This is facilitated through special tracking software referred to as **Track*IT**.

The “Life Cycle” Part of the SDLC



PROJECT CREATION/SUBMISSION

- Project is created in the Track*IT system, which initiates the SDLC workflow.
- Projects can be created by most data center employees.

PROJECT APPROVAL

- The submitted project is approved by one or more authorized staff, flowing through a standard approval matrix according to project type.

DESIGN SPECIFICATIONS

- If necessary, project specifications (“specs”) are written, explaining the end-user requirements for the project and as much technical detail as appropriate to explain the desired technique and outcome.

The “Life Cycle” Part of the SDLC



DEVELOPMENT

- A programmer or other technical resource works on coding the software changes.

QUALITY CONTROL TESTING

- Software changes are tested to ensure they match against the original project intent and follow current development standards.

SLATING FOR RELEASE

- A decision is made on a date when the project will be moved from a development environment and become part of live production.

The “Life Cycle” Part of the SDLC



BETA TESTING IN THE FIELD

- Software changes are deployed in a limited, controlled environment to selected clients, who agree to work with our teams and give feedback on the enhancements

DOCUMENTATION/CLIENT COMMUNICATION

- Documentation is written to explain the changes to clients and support staff.

IMPLEMENTATION/FINAL RESOLUTION

- Software is moved from the development or beta test environment into production.

Project Classifications



Architectural Change

Card Conversion

CU Conversion/Merger

Custom Forms

Custom Request

Feasibility Research

Generic Forms

GOLD Screen Modification

Program Modification

Software Enhancement

Warranty Adjustment

Guidelines for Making Approvals

- **Program Modifications and Warranty Adjustments:** With the exception of fast-tracked projects already described, to get a yes it must be realistic that the work can begin within the next 12 months after the project is approved.
- **Software Enhancements and Architectural Changes:** Initial approval is based on our estimate that it is feasible for preliminary research and/or design work to be completed within 18 months of project approval.
- **Custom and Conversion Projects:** Initial approval is based on separate client approval and contractual agreement processes.

Project Requests: Where Do the Ideas Come From?

BUSINESS DRIVERS

- Xtend SRS Bookkeeping
- AuditLink
- Lender*VP
- Xtend
- Earnings Edge
- Imaging Solutions
- SettleMINT EFT
- OpsEngine

EVENT DRIVERS

- Leadership Conference
- CEO Strategies
- Focus Groups

CLIENT DRIVERS

- Industry and regulatory directives
- Sales contracts and contractual obligations
- Custom work
- Changes by third-party vendors
- Direct requests from clients

Tracking Progress

- The primary method for tracking projects through the SDLC is the **Track*IT** tool. As projects move through various stages, they are marked in **Track*IT** with a status code.
- [The Release Schedule](#) compiles major projects being slated for specific releases. A PDF copy is posted weekly on the Release Planning page of the CU*Answers website.
- During Quarterly Strategic Planning sessions, each programming team leader summarizes their team's current activities, as well as upcoming and outstanding projects.
- **Track*IT** monitoring reports and tools are utilized to keep an eye on project progress and investment, especially when it comes to allocation of programming resources.
- [Owner's View](#) is an online resource that allows clients to review the current of all projects currently in the pipeline.



Additional Resources

[CU*Answers Kitchen Page](#)

[The Programming and Quality Control Nucleus Pages](#)

[Latest Release Schedule](#)

[The Idea Form: An Online Suggestion Box](#)