

Challenging
clients to develop
software in
a creative way!

Promoting a Builder's Persona

*A Strategy for Building Custom Software
with CU*Answers*

About Developer's Help Desk

For over 50 years, CU*Answers has been developing and delivering world class IT solutions to the credit union industry. As a cooperative, our member-owners' success is our priority. An important component of this model has been a sustained "do it together" (DIT) process, and to collectively partner to help design and build upon many of these tools. All members of the cooperative chip in, and through shared resource execution we all succeed. However, this also means that the network has had to manage resources and priorities... **sometimes, you may wish to go your own, DIY way.**

In many ways, our philosophy for providing a DIT development strategy will never change. CU*Answers will always develop a regular stream of new software tools and core CU*BASE releases. For many clients, this will remain a perfect fit. However, for others, they are anxious to take their development ideas to a higher level.

Our Developer's Help Desk (DHD) represents an exciting vision for how client software development projects are handled at CU*Answers. It is uniquely targeted to facilitate the process by which clients design, build, and manage custom projects in an innovative (DIY) way.

What is DHD Thinking?...

- I want to talk about something I want to build, not something that has been previously built
- I want to build something that is not necessarily CU*Answers motivated and developed
- This is my plan... I want to design it as I envision it
- I want to be the contractor, and simply hire out the resources needed to complete my idea
- I am empowered to build it as I envision it!
- I love the DIT spirit, but in this situation, I want a DIY option



I want to build something!

→ Look inside for more information

Have an Itch? A Spark? An Idea?

Maybe you need to scratch that itch, ignite that spark or dream of creating that idea. The Developer's Help Desk is here to help navigate the step by step processes.

For instance, our DHD website and online store are designed to provide our community with an online retail "shopping" experience. This includes being able to review details and processes CU*Answers employs for starting custom project requests (for both DIY and DIT projects), and then "ordering" many of these project services right through the DHD store. By automating these upfront processes, we can offer a simpler, more streamlined shopping approach for many clients (and vendors), while still providing a deeper collaboration/technical option for folks considering a more complex DIY initiative—such as integrating a new 3rd party LOS system to CU*BASE.

Whether ordering an "off the shelf" project such as switching supported EFT providers or going down a whole new road working with an outside vendor to build a customized solution, the Developer's Help Desk is here to assist.

Getting Started with a Custom Project?

First, determine the type of project you are looking to build. Does it represent a change to existing CU*BASE functionality, is it a custom project request, or is it an API development consideration?

For any of these, a great place to begin is our DHD site (dhd.cuanswers.com). This site will provide information on all of these project types, tools to help evaluate whether your project is a CU*BASE enhancement or custom project, pricing considerations, ordering opportunities, and much more.

Remember, at any point that you may need help, simply contact us via our DHD site and we will work closely with you.

A. Making a Change to CU*BASE

Changes to CU*BASE normally fall under two primary criteria: improvements to existing functionality (DIT) and custom development projects (DIY).

When ideas are initially submitted to CU*Answers, our management team reviews the merits of the proposal and evaluates it from a big-picture standpoint, determining how and if it fits with current and future product development goals. If approved, it enters the software development life cycle (SDLC), potentially making its way to a future software release.

In other cases, the changes requested are those that will not be pursued as a CUSO investment, but can be completed for the credit union through a custom development project (DIY)—for example, a process for a new custom fee or integrating with a new CRM system. In that case, simply contact a client services representative or visit our DHD site for additional details on getting started.

A credit union can review or start the process of requesting a **"Change to CU*BASE"** in the following ways:

1. Review on-going CU*BASE project development

CU*Answers has a variety of resources online to help keep track of project development. Using the CU*Answers website, visit the Kitchen for big projects on the horizon, the Release Planning page for information on upcoming releases and enhancements included, and Owner's Voice to check the status of projects already in our development pipeline.

2. Complete an Idea Form to tell us about your idea

Idea Forms give us a way to know what staff at our credit unions would improve about our software, from the line workers to back office staff. CU*Answers will review your idea and start a dialogue to discuss the merits of your idea further, and make a determination on whether or not to work towards developing the idea.

Contact us at dhd.cuanswers.com to start the discussion to have CU*Answers complete your project!

B. Custom Project Development

There are two primary categories:

Off-the-Shelf projects – represents a common project we've previously completed and are normally very familiar with the project parameters and specifications. We also provide standardized pricing for many of these projects in our annual pricing guides. For these types of custom project requests, visit the DHD online store to review and order many of these services. Examples of these types of projects include a currently supported EFT vendor, credit card or check processing vendor conversion. Check out our online store at store.cuanswers.com/the-developers-help-desk

Custom Programming Project Requests – a more customized (personalized) project development strategy in which you are often the architect for designing the project blueprint and building the solution. However, don't be daunted! Our DHD team is here to collaborate in helping make your project vision become reality. For example, in considering your project, you may optionally wish to contract with CU*Answers to engage its expert resources in a variety of ways, including project design/management, programming, quality control, marketing, compliance, back office, and more. In essence, our Custom Project "suite" represents an array of services, spirit and vision for helping you drive the initiative forward and on your terms. Examples of these types of project include new 3rd party vendor integrations, SSO projects, data exchange (DEX)/data warehouse file downloads and more.

Key Custom Project processes:

1. Contact either Client Services or Developer's Help Desk – we'll assist you in completing a Special Project Request/Authorization form.
2. Your project request is presented to our Project Team.
3. The Project Team will review and deliver (as applicable) a R&D (research/design) bid.
4. Initial project research/design work is completed.
5. A more formalized project development bid is provided.
6. If the development bid is accepted, applicable agreements are completed.
7. Project development work begins! All components, including estimated project time lines, on-going project updates, quality control/testing, implementation guidelines, etc. are scheduled as per our published SDLC guidelines

Project Development Phases

Think it.

Ideas don't always come easily, but when you have a good one, it's exciting to tell others and work towards that goal. Give your idea a chance to blossom!

Write it.

Explain the idea. Write it out so the users, stakeholders, and developers can understand. A good spec leads to a good *design*. *We even provide online tips and examples for helping write custom project specifications.*

Fund it.

Time, money, manpower, hardware. Unlock and free up the required resources. It's not always easy to commit the necessary resources, but a project with insufficient resources and commitment is doomed to fail. Most custom development projects will involve two fees: one to cover the cost of performing necessary research to develop a project understanding and design direction, and another to cover the actual development cost of programming, testing, quality control, required documentation, etc.

Build it.

The right developer makes all the difference. If it's not you, a partner that can manage the project and deliver the goods is priceless.

Launch it.

When and how will it deploy? What resources are needed to deploy it? Can you answer these questions or need a partner to answer them?

Support it.

Help and support your users. Maintain your project as technology, use and requirements change. A popular software can fail if your support is lacking. Can you provide a good support or do you need help?

Visit Getting Started with a Custom Programming Project at

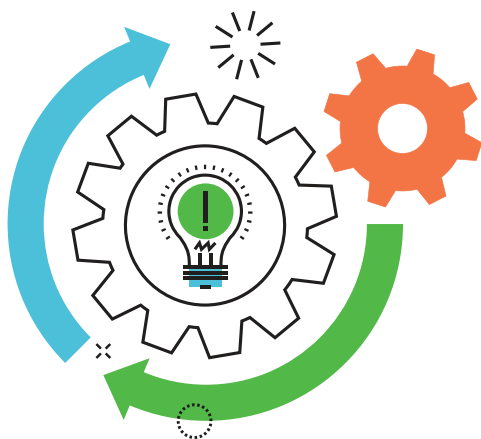
[dhd.cuanswers.com/toolbox/
custom-programming-project/](http://dhd.cuanswers.com/toolbox/custom-programming-project/)

C. Using CU*Answers APIs

API development represents an important step in revolutionizing our ability to be flexible in providing data in a secure but streamlined manner, not only within the products we develop, but as a channel to allow others to develop products that connect with and integrate into the CU*Answers product suite.

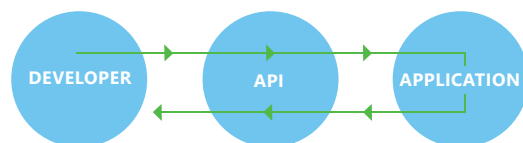
Once an API is developed, it can be used by other third-party applications, CU*BASE, It's Me 247, mobile web, loan applications, or anything that we allow data access from now and in the future. The CU*Answers API process requires several security keys and the instructions to connect, thus enabling faster integration to external applications, and at a considerably reduced price point compared to creating custom programming code for each partnership.

While development of an API is an important strategy, in many cases we are combining this effort with the development of new products. This allows us to not only build the inventory of needed APIs, but allows us to simultaneously leverage them by delivering new products to our clients.



Key API processes:

1. Visit the DHD site to review current API information (including our latest API Catalogs!) and documentation needed to estimate the development effort to integrate our APIs into your process.
2. Execute the necessary Agreements to get the process in motion.
3. Order the desired API key(s) to begin development against a test CU*BASE credit union. Depending on what you are creating, you may need access to some or all of the API key sets.
4. Not seeing a desired API? Consider sponsoring the development of new custom APIs. Contact the DHD to discuss further.
5. Determine what further testing/verification may be needed. For example, you may order pre-scheduled test window time slots to provide an additional testing layer.
6. Client sign-off, production API key set ordering, and scheduling a launch date!



Get Started!

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