

## **MABUG Survey for Presentation on Best Practices in Custom Development**

Thank you for agreeing to take part in our survey of Banner clients for IData Incorporated's presentation on best practices in custom development. The focus of this presentation is the processes and tools used in the custom source version control, project documentation, and configuration management. IData has noticed that there are many different methods used by schools to manage the custom software.

The goal of this survey is to look for examples of successful configuration management practices and to promote dialogue amongst Banner users. IData is a higher education technology consulting firm that works with many different institutions.

### **I. The Development Lifecycle**

This section discusses the general development process and architecture

- 1) What type of custom development do you have on your Banner system?
  - a. Custom jobs
  - b. Custom reports
  - c. Custom interfaces
  - d. Custom forms
  - e. Custom Tables
  - f. Do you ever modify Baseline Banner code?
  - g. Any other custom code?
- 2) Describe your current instances for Banner Development, Test, Production, and Reporting?
- 3) Do you do all development in one instance?
- 4) Where do you do initial Unit Testing?
- 5) Where do you do User testing?
- 6) What is the process of promoting code from one instance to the next (Development to Test, Test to Production)
- 7) Do you use any third-party reporting tools (Crystal, and BI tool, etc.)? If so, do you have separate development and test instances for creating reports?
- 8) When SunGard delivers new releases, do you have a strategy for testing and retro-fitting custom code?
- 9) Do you have any special Development or Test instances for your web components or interfaces?

## **II. Version Control**

This section discusses any tools used for managing custom source version control

- 1) Do you currently use any formal tools for custom source version control?
- 2) If “Yes” to #1, then:
  - a. What system do you use for the following Banner items?
    - Jobs and Packages (PL/SQL, ProC, SQRs, SQLLoader, etc.)
    - Unix Scripts
    - Reports (Crtystal, etc.)
    - Ad Hoc SQL
    - Oracle Forms
    - SSB Packages
    - Other?
  - b. Are you happy with the tools?
  - c. Is it a struggle to get people to use it?
  - d. Do you ever use the version control systems for Rollback, backups, or cloning of your entire system?
- 3) If “No” to #1, then:
  - a. Do you have any informal practices for version control?
    - Backups
    - Local copies
    - Other?
  - b. Have you considered using version control and decided against it?

## **III. Documentation and Knowledge Base**

This section discusses systems used to track documentation on any custom development

- 1) Do you create any documentation on the custom development created at your institution?
- 2) If so, do you have any system of keeping track of the custom documentation?
  - a. Project requests and status?
  - b. Requirements documents?
  - c. Technical specs and design documents?
  - d. User documentation?
  - e. Other project documents (meeting notes, etc.)

## **IV. General Question for survey**

This information is being collected for use at the Mid-Atlantic Banner users group.

- 1) Would you be willing to have your institution’s name mentioned as a responding school to the survey?
- 2) Can we specifically refer to any of your responses?
- 3) If asked, would you be willing to be contacted by another Banner institution?