



Bowling Green State University

**BG@100**

## **Change Control Process**

Presented to

Executive Steering Committee

June 14, 2004

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### **BG@100 Team Mission Statement**

**"The BG@100 project, named in recognition of the vision for the university's centennial milestone, is committed to providing efficient, effective and high quality information and service to students, faculty and staff. To meet our changing needs, BGSU is implementing PeopleSoft to advance the technology that supports and serves the learning community."**

## Project Plan Preparation

At the conclusion of Task Order #1, PeopleSoft prepared a project plan for the implementation of the Human Capital Management software based upon the scope definition for Phase 1. In addition to all of the tasks that are required by PeopleSoft's Compass methodology to implement the software vanilla, the project plan also includes representative tasks for all of the customizations to the AHRS system since its inception. Each of these customizations takes one of the following forms.

- Incoming Interface
- Outgoing Interface
- Report
- Adjunct Online Application
- Online Modification to AHRS

The AHRS customizations were included in the project plan to create a worse case scenario. Even though these customizations currently are documented in the project plan, there is no expectation that past customizations will be recreated in the PeopleSoft application. A litmus test is required before these changes will be accepted.

## What is a customization?

The change control process is centered around the idea of a customization. What is the definition of a customization? The following definition is submitted for your approval.

A customization is any add, change or delete to a PeopleSoft delivered component. A component may take the form of any of the following.

- Online Pages (a.k.a. screen or panel viewable via web application)
- Database Tables
- Interfaces (usually batch but could be triggered online)
- Reports
- Workflow
- Any change to the software that would need to be repeated during an upgrade

The last item on the above list is a catch all caveat. Customizations are a concern if they are required to be preformed again in order to upgrade the software. The more customizations that you have, the longer an upgrade will take. It is estimated by PeopleSoft that an upgrade to their Human Capital Management software that has not been modified is 3 to 6 months. The reapplication of customizations will only serve to lengthen the upgrade time and increase the upgrade cost.

## Acceptable Customizations

It is inevitable that certain customizations be made to any packaged software. Therefore, for your approval the following list of acceptable reasons for customizing are presented. This reasoning assumes that only current ITS supported programs are being considered.

1. Maintain compliance where required by law.
2. Maintain compliance with local, state and federal government agencies.
3. Maintain compliance with university specific agencies.
4. Maintain compliance with outside vendors.
5. Maintain existing interfaces with other packaged software currently being used at the university.
6. Maintenance of translate table. PeopleSoft delivers numerous code tables and their interpretations in a collection called the translate table. It is assumed that customers will add, change and delete the delivered values as desired.

If the above criteria are met, then the change would be considered an acceptable customization and would be scheduled in the project plan without being formally presented to the Executive Steering Committee. Then, for each customization the following information would be provided to the Executive Steering Committee on a regular basis.

- Estimated Hours for Original Implementation
- Actual Hours for Original Implementation
- Estimated Cost for Original Implementation
- Actual Cost for Original Implementation
- Estimated Hours for Upgrade
- Estimated Cost for Upgrade

## Unacceptable Customizations

There are certain subjective customizations that should be avoided. There are also recommended methods on how approved customizations should be made. The following list of unacceptable customizations is presented for your approval.

1. Aesthetics. This would include such things as changing the labels on fields, changing the order of fields, deleting unused fields, any change in appearance, etc.
2. Using any delivered field for anything other than what it was designed for.
3. Adding approved changes to a delivered online page.
4. Adding approved changes to a delivered application database table.

## Action Item Procedure

With the elimination of acceptable and unacceptable customizations from consideration leaves a *gray* area. A variety of reasons may exist as to why a customization would fall into this category. A customization may be desired because it would greatly improve a business process. There could be an infinite number of reasons why a customization is desired. These types of customizations would require approval by the Executive Steering Committee and would be presented in the form of Action Items.

Action Items would be presented at normally scheduled ESC meetings unless an urgent decision was required. At such time, a special meeting of the ESC would be convened. The format of the Action Item presentation would be the following.

1. Background information related to the item including an explanation of the business process.
2. Choice of alternatives.
  - a. First choice would always be the result of using the vanilla software and why this solution is undesirable.
  - b. At least one other, but no more than two other choices would explain the desired customization and why it is valued.
3. All non-vanilla alternatives would estimate cost in terms of hours required and external consultant costs. In addition an estimate of the ongoing maintenance cost would be documented. Actual hours and cost would be reported later in the same fashion as the "acceptable customizations".
4. Date ESC decision is needed.

Presently there is no estimate to the number of Action Items that would be brought forth to the ESC. Currently there are 120 potential customizations documented in the project plan. After each of these undergo the litmus test for acceptable customizations, then an exact number of Action Items will be known.

## Summary

In conclusion your approval is requested on the following items.

1. Approval of the definition of a customization.
2. Approval of the Acceptable Customizations criteria.
3. Approval of the Unacceptable Customization criteria.
4. Approval of the Action Item Procedure.