University of Missouri
Financial System
Change Request Procedures

Background:
End users in all Business Units need a formalized avenue to present change requests for evaluation, approval and prioritization. End users should have an open line of communication with members of Business Process Teams (BPT). A sponsor will take ownership and responsibility for presenting the change to the BPT and will assist with or prepare the change request form for submission to the Change Review Committee (“Committee”).

Procedures:
The sponsor of a requested change should discuss the change request with the BPT or a BPT member and, with assistance, complete the Financials Change Request Form –

1. The BPT will work with appropriate personnel to develop the business case for the requested change, reasonable estimates of pros, cons and estimated hours to complete the recommended change.

2. The BPT should rank the change relative to other requests by the BPT (assign a team ranking of the change from 1 to 5 with 1 being high and 5 being low).

3. Change requests and summary of relative prioritized list of requests should be submitted to the Committee for review and consideration.

4. The Committee will review all change requests submitted by BPTs on a regular basis.

5. The Committee will review the change requests and evaluate business case, pros, cons and estimated hours in approval of the solutions that most benefit the University.
6. The Committee will establish the relative priorities of approved change requests in the following categories:

**High** – Priority item that would immediately result in significant cost savings and efficiencies for the University. No work around is in place or the work around does not adequately meet the needs of the institution.

**Medium** – Enhancement or change that would benefit the institution and result in some cost savings and efficiencies. There are sufficient processes in place to continue doing business but this request would enhance or streamline these processes.

**Low** – Enhancement or change that would complement current processes or enhance the aesthetics of the application. No immediate need but would result in improved processes for the University.

7. The Committee will establish a further list of relative priorities of the approved requests across all finance applications and processes for each of the High, Medium, and Low categories and provide the list to the Technical Team Lead on a regular basis when updated by the Committee. The Technical Team Lead will utilize the list as a guide in scheduling technical resources to the approved change requests.

8. Prior to beginning work on the change request, the BPT may need to develop more detailed specifications and re-submit the change request for validation that estimates have not changed materially before final approval and prioritization.

9. After the change has been developed and is ready to be tested, the sponsor of the change, as well as BPT, must approve the change as meeting business needs before final implementation.

10. Functional Lead must sign off that adequate testing has been done and functionality of the modification/enhancement is working as designed before final implementation.
Role Expectations and Definitions:

**Sponsor:** The sponsor may be a member of the BPT, an end-user, or other member of the University finance community. The sponsor must be open to new ideas and impartial to various business processes or solutions. Sponsors must be willing and capable to “own” and provide significant support for the change throughout the processes of formulating complete solutions, specifications, analysis, costing, development, change management, testing, and final implementation. Sponsors may be required to clarify the business needs for evaluation by technical staff, the Committee, or the Controller’s Office for system policy and procedure changes. The sponsor must support the change request throughout the complete lifecycle.

**Business Process Team:** The BPT members consist of a variety of staff that represents subject matter experts. The team has the goal of meeting business process needs through a balance of software, procedures and policies. Team members will meet routinely or as often as necessary to address consistent issues that indicate an underlying need for change, or as necessary to address specific change requests. The BPT will refine the change requests to ensure effective communication with readers and prioritize the request within the BPT’s range of responsibility.

**Change Review Committee:** The Committee will be made up of a broad range of business process owners sufficient to provide an overall objective viewpoint of the financial organization’s processes, requirements and business needs. The Committee will meet routinely or as necessary to consider changes requested. The change requests should be reviewed to determine the best solution for the University that provides the most benefit weighed against the costs. The Committee will establish relative priorities of the approved requests across all finance applications and processes so that work is executed in an organized and structured manner.

**Functional Lead:** The Functional Lead is responsible to organize the BPT so that all reasonable aspects of changes are considered and adequate representation is provided from the University finance community. The Functional Lead is responsible to solicit and provide advice regarding
the impact on software, policies or procedures of any changes requested. The Functional Lead will ensure adequate coordination during the lifecycle of change requests. This may include assistance in writing change requests, facilitating time estimates, writing design specifications, testing, leading or coordinating testing by others, deployment, and assistance in training material development.

**Technical Team Lead:** The Technical Team Lead is responsible for reviewing and providing input on change requests, writing technical specifications, and organizing the development staff. The Technical Team Lead will also provide regular communications to the Committee concerning request status, other technical projects and possible issues, including any impact to delivery. The Technical Team Lead will work in close relationship with the Functional Lead to manage milestones throughout the lifecycle of the change request. All requests for enhancement or cases to be logged with PeopleSoft will be logged by the Technical Team Lead, who will work with Functional Leads and other technical staff to manage those cases.