# Receiving and Managing User Requests

**04/11/2011**

**Purpose of the Document**

Over the past year or more requests for software development and customisation have become less visible to management oversight for several reasons, and so the ensuing projects or tasks often do not get the benefit of coordinated initiation and planning in their early stages. This has sometimes created problems of duplication, which ultimately results in re-work or sub-optimal use of time.

It is important to identify the main cause because it will not always be possible to avoid it so one must plan for it. As a result of the absolute urgency of the transformation project being driven by the Campus leadership, resources, in many cases, have simply been made available to the transformation teams for process improvement support.  In such cases we have bypassed the procedure for completing the Service Request Form as the initiation of the work to be done, and for internal dialogue to determine who is best placed for the task and what is required. The pattern has now spread to other projects, and we must therefore enforce the procedure across the board once more in order to deal with our internal governance and our auditability.


**The Procedure**

All requests for projects (and also for significant tasks[1]) must be recorded on the MITS Service Request Form in order to become an official request for service. The onus is on the MITS recipient or service personnel to ensure that the Form is completed. If necessary, the MITS recipient may assist the customer/requester in completing the form, after which it must be signed by the requester.

Where a request for customisation or system development signifies that data, normally maintained by one of the enterprise applications (PeopleSoft, Banner, TMA), is required, the first task or decision must be to determine how to relate the new change request to the appropriate enterprise application data.  This should be supported by way of discussion with the appropriate team.

The following rules apply (within some decree of discretion):

I.     HR and Payroll data must be managed from PeopleSoft
II.    Financial data must be managed from Banner Finance

III.    Student data must be managed from Banner Student

IV.    Facilities data must be managed from TMA

 (Note: Discretion may be applied to situations where new data elements (not existing in the enterprise applications) are required to address the request.)

**How to complete the document**

The requestor will complete the first two pages, the sections being:

a.  Requestor
b.  Request Details
c.  Control Information (Authorisation should be under the signature of the Head of Section of Head of Department. However where it is clear that an individual has been designated by the HOD as his/her representative, this person's signature will suffice.)

The section titled <u>For MITS Only</u> will be completed by the MITS request recipient, collaborating with the significant team. (Note: Work teams are appropriately named so that it is easy to determine the 'significant team' …. See list below)

The section titled <u>User Acceptance Testing</u> UAT must be completed as evidence of appropriate testing having been done. Test results should be attached. (Note that there are sample UAT forms available from the appropriate MITS Applications team.)

Note [1]:  Tasks that are immediate fixes from an error occurrence are usually of such short duration (measured in hours rather than days) that an email request is sufficient.  Routine support activities are also not regarded as being 'significant' for the request purpose.  Those tasks which require significant application of the development cycle (investigation / analysis/ design ….) must be treated as 'significant'  requiring the full application of the request process.

| Work Teams…. | |
|---|---|
| **MITS Application Team** | **Team Leader** |
| PeopleSoft | Allison Dundas |
| Banner Finance | Kirk Mullings |
| Banner Student | Garvin Gordon |
| TMA | Bruce McDonald |
| Extender (Document Management) | Bruce McDonald |
| Web | Rohan Shaw |
| Faculty Services (Exam processing, SPSS support etc…) | Joan Leitch |
| Database Administration | Carl Duncan |
| Business Intelligence (not yet off the ground) | Ian Sutherland |

Reference documents:

Filename   :     "Change Management Policies and Procedures…. docx"

"Guidelines IT Change Control Methodology…. docx"

The Service Request Form is downloadable from the MITS Website, Forms page.