Title – ERP Change Management Policy

Policy Abstract – Birmingham-Southern College partners with a vendor to provide an ERP solution for the campus. As changes to the system occur it is important to properly manage change to ensure integrity of the system. This policy governs how those changes take place.

Responsible Office – Information Technology, Administrative Systems

Official – Anthony Hambey

Contact(s) – William Rayburn, 226-4885, wjraybur@bsc.edu
Applies To – Information Technology, Administrative Systems
Effective Date – 6/1993
Revision Dates – 8/31/2021

1. **Introduction/Background –** The College purchased the Datatel, now Ellucian ERP products in 1993 and made the decision at that time to use the system as delivered with very few modifications. The modifications were to be in the area of output generation and report creation where the delivered ones were not adequate. Through the years the College has adhered to that policy, resisting the temptation to customize, making upgrading to subsequent versions of the software easier.

2. **Purpose –** The vendor is constantly making changes to the software driven by government regulations; client requested changes as well as addressing bug fixes. The method used to upgrade the system is to operate three environments containing the software and data for the system. Changes migrate through the environments where they are tested.

3. **Applicable Regulations –** SACSCOC, Principles of Accreditation 2018

4. **Policy Statement –** Changes to the ERP will proceed in order through the environments listed below.

   - **Development** – changes, fixes and patches are loaded into an environment available only to IT. Verification is done to ensure the load does not break normal functions of the system through rudimentary checks of the impacted areas.
   - **Test** – changes, fixes and patches are subsequently loaded into a test environment available to users. Users are instructed to "test" the newly updated software, checking workflows and normal operation.
   - **Production** – Upon sign-off by the users impacted by the changes the software is then scheduled to be loaded into the production environment typically in the early morning or evenings during non-business hours.

5. **Detail**s – An annual financial audit of the college contains a technology component whereby this is verified each year. Non-compliance with this policy would be reported in the form of comments in the management letter of the audit.

6. **Definitions** –
   - ERP is a term meaning Enterprise Resource Planning. This is an industry standard term referring to software applications used to operate the business function of an organization.
   - SACSCOC is the Southern Association of Colleges and Schools, Commission on Colleges.

7. **References –** SACSCOC, Principles of Accreditation 2018