1 – IT POLICY

The purpose of this policy is to document the activities and timeframes related to the routine upgrade of the Datatel Colleague application via the implementation of minor software level updates. This process is not intended to be used for major Datatel version upgrades.

Definitions: The following definitions are relevant to this process:

• Live: The production software environment on the Live Server that is used for daily operations on campus.
• Test: The software environment on the Test server that is used for the initial implementation and testing of all application software updates and enhancements to Colleague.
• Test Server: A server containing a copy of the live account. The Test Server is used for the initial implementation and testing of updates and enhancements to the Colleague product, and its’ associated interfaces.
• Software Update: Any software update (also known as a patch) that is intended to resolve an operational or performance problem (bug) with the software, or add minor functionality changes.
• Patch: (See Software Update)
• Service Request System: An IT Database that stores requests for information and assistance, the person assigned to the request, the status of the request, and the details surrounding the request. This database is used to track the progress of change requests until they are closed (complete).
• Colleague Module Owners: A group comprised of user representatives of each module. It is the module owner’s responsibility to work with IT to review, approve, and schedule the updates/changes to the Datatel Colleague system.

2 - Process
Keeping the Datatel Colleague system current with the latest software updates is critical to assuring the highest level of performance, and in providing the best application support to users on the campus; however, expediting upgrades to the system must be balanced with adequate testing combined with a process to minimize system downtime to users.

2.1 Initiation
   a. The System Administrator downloads available software updates from the Datatel product repository.
   b. The test environment is updated on Monday of every week. The Datatel Software Updates spreadsheet is then updated listing the patch identifier, description, release date, and install location. The IT Analysts can then schedule review and testing with the appropriate module owners.

2.2 IT Analyst Review
   a. The IT Analyst refers to the Datatel Software Updates spreadsheet to obtain the software updates that are assigned for their review.
   b. The IT Analyst reviews their assigned updates using online Datatel documentation and performs any preliminary testing necessary.
   c. When the review is complete, the Analyst can schedule review and testing with the appropriate module owners.

2.3 Software Update Documentation
   A Service Request is opened by the IT Analyst listing applicable patch information such as:
   a. the patch identifier, and the associated Datatel documentation
   b. describing the change and the reason for the change
   c. summarizing the impact the change will have on the system
   d. suggested testing guidance and/or considerations

   The Service Request is assigned to the applicable module owner. The module owner receives an e-mail notifying them that a patch is waiting for their review and approval.

   Any problems discovered by the module owner will be directed to the IT Analyst who will ensure that the issues are addressed.

2.4 Approvals
   The Datatel Software Updates must be approved by the following module owners:
   a. in the case of the Financial Aid system, the Director or Assistant Director of Financial Aid;
   b. in the case of the Colleague Financials system, the Controller or Assistant Controller;
   c. in the case of the Student system, except Accounts Receivable and Cash Receipts, the Director or Assistant Director of Records and Operations;
3 - Authorizations and Approvals

Authorizations and approvals must be in writing and may be given by email or by annotating the associated service request.