

**Core Team Project
Scope of Work TEMPLATE**

Project Champion: Caroline Diedrich **EST HRS (For IT use):** _____
Project Name: Addition of Scholarship Criteria and Selection Committee to Financial Report
Request Date: 3/4/14
Proposed Completion Date: 12/31/14
Areas Impacted: Compliance, Accounting, IT, University Scholarship Coordinators

WHAT (is this project)?

The purpose of this project is to...

Create one cohesive report with financial information as well as the criteria and selection committee information for scholarship funds.

WHY (do we need to do this project)? What is the business need? What is the financial impact?

This will allow the scholarship coordinators at the university see everything in one place and create efficiencies for them in making scholarship selections each year.

I anticipate several hours per year of time saved for each scholarship coordinator on campus with this report. (There is one scholarship coordinator per unit.) This will also save the Compliance department at least the same amount of time as much is devoted to looking this information up and relaying it to the scholarship coordinators.

WHO (does this project impact)?

This project impacts Compliance, Accounting, IT, and the University Scholarship Coordinators. Compliance and the scholarship coordinators will be impacted in a positive way as this will allow information to be more readily available to both groups. Currently, to obtain scholarship criteria and selection committee info, you must either look at the project record in FE or at the project agreement in AX. Completing either of those tasks for each individual scholarship fund is timely and inefficient.

Accounting and IT will be impacted if we add this information to the online scholarship reports that are currently being developed, but I do not anticipate a huge time commitment. I have already created a query in FE that will pull this information (See Queries- Compliance- Scholarships Missing Attributes). The only issue with the query is that the Notes fields are truncated when it is run and exported.

WHEN (does this project need to be completed)? If there is a deadline, what is the **reason** for it? Is there urgency to this project? If so, explain.

If possible, this project should be completed by Dec. 31, 2014. The reason for this deadline is to have the report in place before the scholarship coordinators begin making selections for scholarships for the 2015-2016 academic year. (The process begins soon after Christmas break.)