

PROJECT CHARTER - Non-Sponsored Projects (DRAFT)

Project Name	Non-sponsored Projects
Project Manager	Jim Johnson
Sponsor	Al Benzschawel
Customer	UW Madison offices/departments that have non-sponsored project operating budgets and have reporting responsibilities for these projects.
Document Version and Date	Version 5.00. Updated December 20, 2007

Project Scope	
Business Needs	<p>Many UW Madison schools and departments have significant amounts of funding in non-sponsored projects. However, Madison does not have a campus-wide project accounting system to manage these projects. We currently use the project or department ID chartfields in SFS to record the financial activities of these projects in conjunction with a lot of manual processes. This type of accounting and project management mechanism does not meet the ever-increasing business needs of the campus in non-sponsored projects management and reporting.</p> <p>With the creation of "Project Lite" – a slimmed-down version of the PeopleSoft Project Costing Module – we will be able to have a system to manage these projects because it provides the features and functionalities to record non-sponsored project information and link the project information to accounting and reporting systems.</p>
Project Goals	<ol style="list-style-type: none"> 1. To identify campus requirements for the implementation of Project Lite for non-sponsored projects 2. To develop policies and procedures in the use of Project IDs for non-sponsored projects. 3. To implement Project Lite based on the identified requirements.
In Scope/Out of Scope	<p>In Scope:</p> <ol style="list-style-type: none"> 1. Non-sponsored projects <p>Out of Scope:</p> <ol style="list-style-type: none"> 1. Sponsored grants 2. Policies and procedures on establishing project IDs for gift funds 3. Policies and procedures on establishing project IDs for trust funds
Project Assumptions	<ol style="list-style-type: none"> 1. Data link from Project Lite to WISDM project reporting will be developed and tested before the Program Release. 2. Project Lite will be implemented with Program Release. 3. Project Lite will be the primary module/system to be used for non-sponsored projects. 4. Campus Divisions will use Project Lite when feasible. 5. Limited changes to WISDM reporting, if possible.
Project Constraints	<ol style="list-style-type: none"> 1. Initial use of Project Lite will be done by Accounting Services. 2. Complete the analysis of project before the end of fiscal year 2008 when possible.
Project Deliverables	<ol style="list-style-type: none"> 1. Document non-sponsored projects business requirements. 2. Develop and document the process of converting qualified existing Dept IDs into Project IDs, including balance transfers. 3. Develop and document the criteria for requesting new non-sponsored Project IDs (except gift funds and trust funds). 4. Define the data elements in Project Lite that will be used for Madison non-sponsored projects. 5. Implement Madison non-sponsored projects processes in Project Lite. 6. Train the campus in the new process.

Requirements

High-Level Milestones and Timeline
<ol style="list-style-type: none"> 1st Quarter, 2008 – Program Release May, 2008 – Be prepared to set up Project IDs when required in Project Lite.

Project Team Roles and Responsibilities		
Team member	Roles	Responsibilities
Ann Bourque, Budget	Team Member	Represents departmental needs
Mark McClintock, SMPH	Team Member	Represents departmental needs
Kathy Peterson, Cont. Ed	Team Member	Represents departmental needs
Mehdi Rezai, L & S	Team Member	Represents departmental needs
Beth Walsh, Education	Team Member	Represents departmental needs
Adam Whitehorse, Engr.	Team Member	Represents departmental needs
Amy Wilson, RSP	Team Member	Represents departmental needs
Jennifer Stenjem, RSP	Team Advisor	Advises team on Project Lite issues
Al Wang, Acctg Serv	Team Advisor	Advises team on WISDM issues
Al Benzschawel, Acctg Serv	Team Sponsor	Promotes, supports & represents team to campus
Lynda Mueller, Acctg Serv	Admin. Support	Documents mapping using Power Point
Mary Hoddy, Wisc. Union	Scribe/Timekeeper	Records ideas, keeps team on track
Jim Johnson, Acctg Serv	Facilitator	Leads and manages functional aspects of project

Communications Strategy
<ul style="list-style-type: none"> Many of the major players affected by this project are participating on the team. Monthly status report to project sponsor and the LAST Steering Committee.

Term, Abbreviation or Acronym	Definition
SFS	Shared Financial System
Project Lite	A slimmed down version of the PeopleSoft Project Costing module for UW System, to be used for non-sponsored projects for Madison, Milwaukee and Extension upon Program Release. It will be used for both sponsored and non-sponsored projects for all other UW campuses
WISDM	Wisconsin Data Mart
SMPH	School of Medicine & Public Health.
RSP	Research & Sponsored Programs
LAST	Legacy Accounting to SFS Transition project