

ERP Project Scope Template

VERSION HISTORY				
VERSION	APPROVED BY	REVISION DATE	DESCRIPTION OF CHANGE	AUTHOR

PREPARED BY		TITLE		DATE	
APPROVED BY		TITLE		DATE	

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1. SCOPE STATEMENT

2. GOALS

3. OBJECTIVES

4. CONSTRAINTS

5. DEFINITION OF ROLES

ROLE	DEFINITION

6. CUSTOMER PROJECT TEAM

DEPARTMENT / ROLE	TITLE	NAME	EMAIL

CUSTOMER PROJECT TEAM, CONTINUED

DEPARTMENT / ROLE	TITLE	NAME	EMAIL

7. ASSUMPTIONS

7.1 COMMITMENT OVERVIEW

Percent of time investment required per week based upon assigned roles.

ROLE	% OF TIME
Executive Sponsor	
Project Manager/Project Owner	
Team Leader	
Team Member	
System Administrator	
Project Advisor	

9. FUNCTIONAL REQUIREMENTS

9.1 LIBRARY MASTER

LIBRARY MASTER	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.2 GENERAL LEDGER AND BANK RECONCILIATION

GENERAL LEDGER AND BANK RECONCILIATION	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.3 ACCOUNTS RECEIVABLE

ACCOUNTS RECEIVABLE	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.4 ACCOUNTS PAYABLE

ACCOUNTS PAYABLE	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.5 PAYROLL

PAYROLL	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.6 INVENTORY MANAGEMENT

INVENTORY MANAGEMENT	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.7 SALES ORDER

SALES ORDER	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.8 PURCHASE ORDER

PURCHASE ORDER	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.9 BILL OF MATERIALS

BILL OF MATERIALS	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

9.10 WORK ORDER

WORK ORDER	NOTES
MANUAL INPUT	
DATA CONVERTED	
REPORTS / INQUIRIES REQUIRED	
CUSTOMIZATIONS AND USER DEFINED FIELDS	
PROCEDURE CHANGES	

10. PROJECT CHANGE CONTROL

11. FUTURE PROJECTS

12. ATTACHMENTS

ATTACHMENT NAME	LOCATION / LINK

13. APPROVAL

Project Approver Name and Title (Printed)

Project Approver Signature *Date*

Project Sponsor / Lead Name and Title (Printed)

Project Sponsor / Lead Signature *Date*

Project Manager Name (Printed)

Project Manager Signature *Date*

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