

KSFA

Kickoff

Technical Workshop

University of Maryland

August 7-8, 2014

Thursday Afternoon

- Project Governance (clearly defined roles)
- Project Structure
 - Financial cycle issues (regs changing annually)
 - Project Roadmap discussion
 - Milestones
 - Technical boundaries - user interface (UI) and rules engine
 - Test Plans and Project status updates
 - What is NOT included in the project?
 - Scope / Cost concerns
 - Discussion on more detailed requirement definition
 - Publish date
 - Review and comment period

Project Governance

- Steering Committee commitments
 - Jim Kennedy voted Chair of Steering Committee
 - May bring in *ex officio* (non-voting) members as it sees fit
 - Randy Timmons (Sigma's *ex officio* member)
 - Provide guidance to the project
 - Assure product vision is met
 - Assist when issues arise that cannot be addressed by PM and FC
 - Hold votes as needed
 - Ensure communication transparency
 - Appoint Functional Council SME's
 - Typical 2-4 hour per week commitment level expected

Project Governance

- Functional Council commitments
 - Biweekly meetings
 - Proposed Tuesdays and Thursdays at 4 PM ET
 - Notes shared on Google Docs
 - Define requirements for each module within each phase
 - Research regulatory questions (if needed)
 - Assist with testing
 - Review documentation
 - 0.3 – 0.5 FTE availability
 - Will vary within the course of the project

Project Structure

- Financial cycle issues
 - Regulations change annually
 - Project will last 2-3 years
 - Proposed: Consider ISIR load completed with 14-15 data, regulatory changes done when implementing school goes live?

Legend

— Development

--- Testing

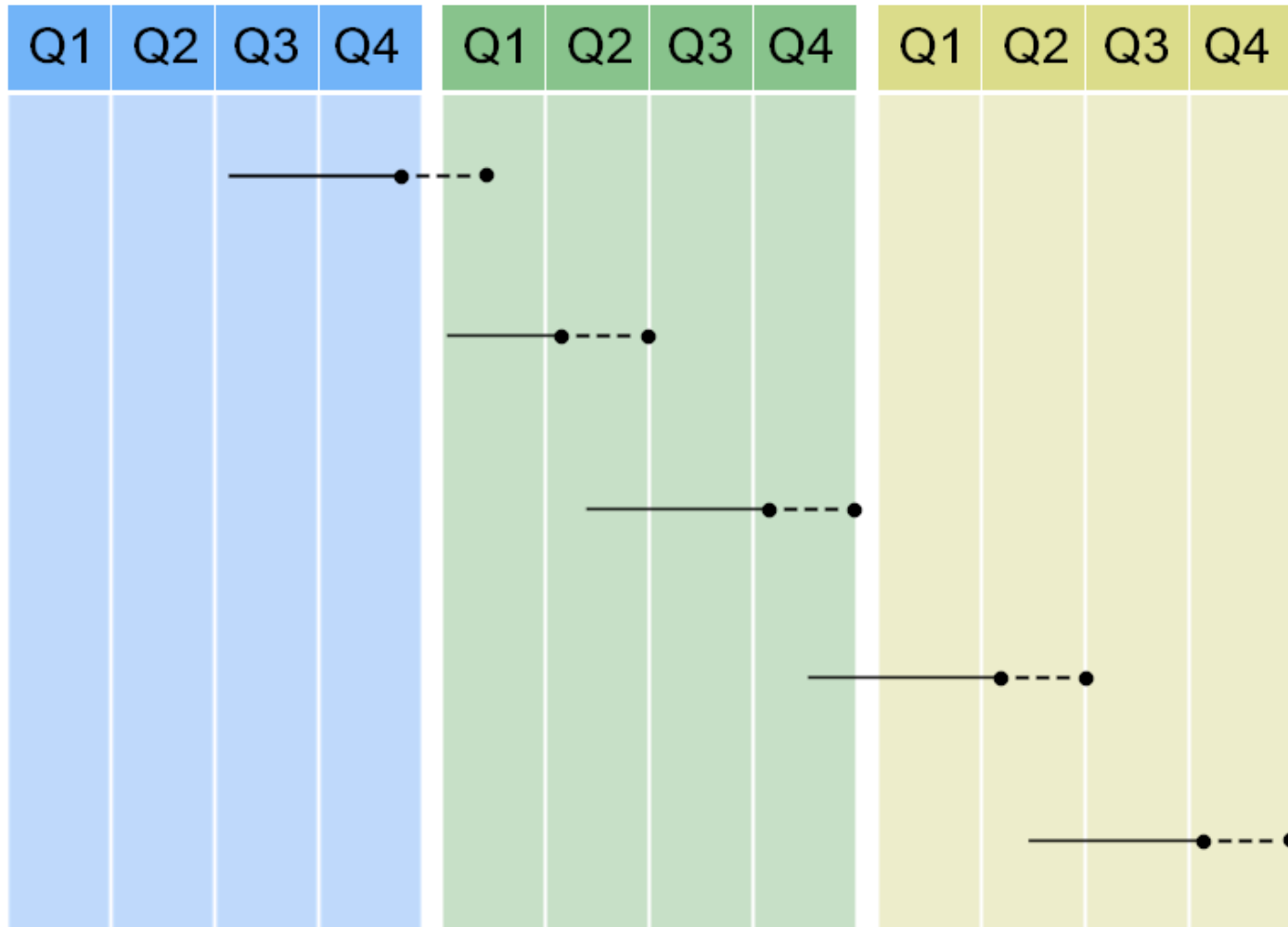
● Release

KSF A Roadmap 2014 - 2016

2014

2015

2016



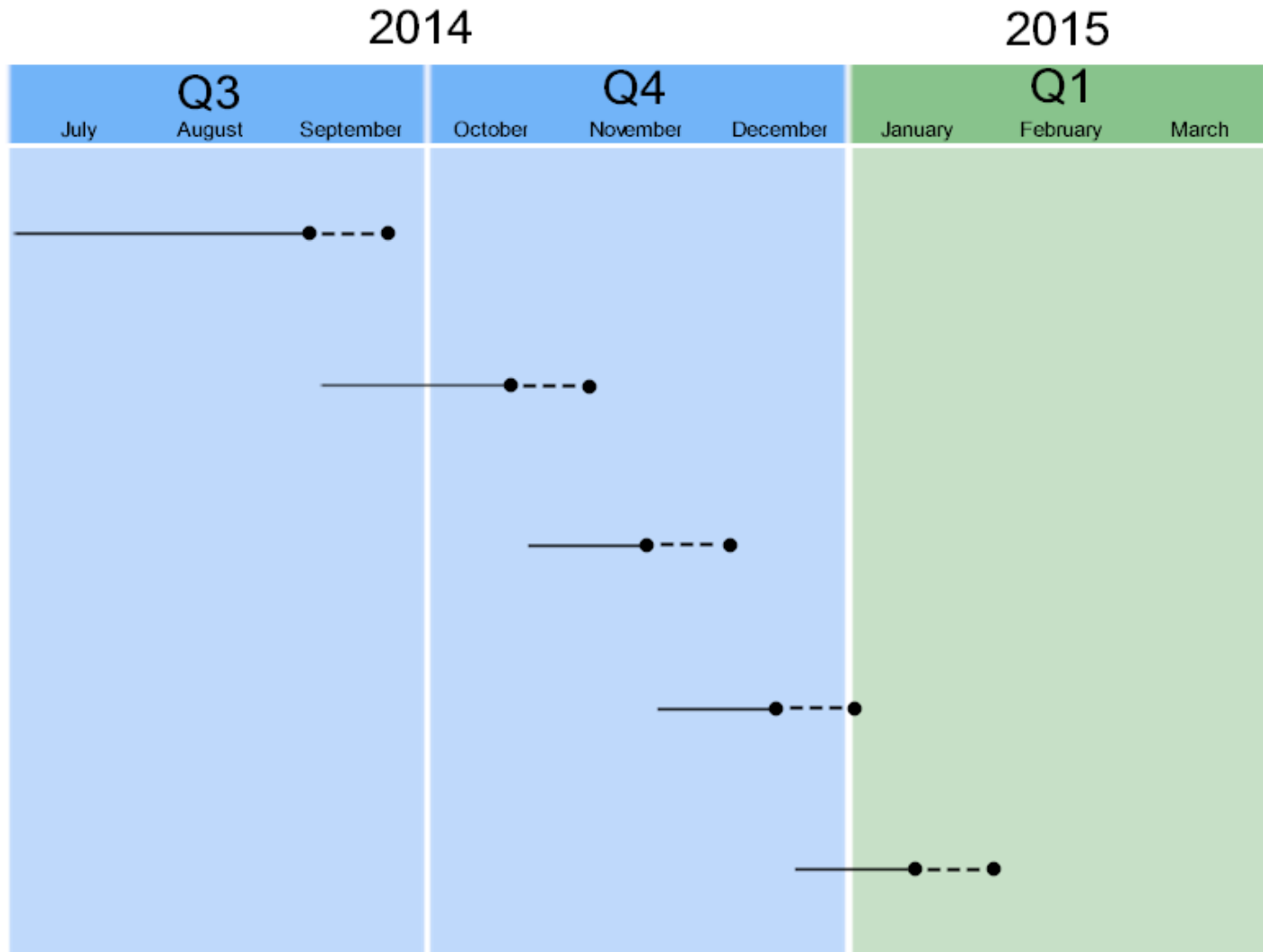
Legend

— Development

--- Testing

● Release

KSFA Phase 1 Roadmap



Phase 1 Milestones

- Produce report on compatibility gaps between Core Rice KRMS and KRAD and the overall project goals.
- Compare multiple ISIR transactions for a single student and manually choose/load one of them.
- Run a SQL query which confirms that all of the ISIR data is loaded correctly into the database.
- Confirm that the estimated EFC calculation matches the Federal calculation for all 12 monthly variations.
- ECAR transactions are generated in a file consistent with the Department Corrections specifications.
- Be able to manually create requests on student records for requirements or documentation.

Project Structure

- Technical Boundaries established
 - Set UI technical boundaries for Phase 1
 - UIX standards under development
 - Need enforceable design guides in PDF to prevent moving target
 - Performance issues to be addressed
 - Set KRMS / Rules engine boundaries for Phase 1
 - Performance issues to be addressed
 - Will conform to KS community standards
 - Allow for productive development
 - Avoid backtracking within project if standards change

Project Structure

- Test Plans
 - Shared with FC during testing stages (example to follow)
 - Excel spreadsheet format
 - Tracks testing of each scenario
 - Provides high-level overview of overall testing progress
- Automated regression testing
 - Cucumber
- Monthly project status report
 - Standard format (to be determined)
 - Discussed with FC during biweekly calls
 - Also sent to Steering Committee to keep them updated

Kuali Student Accounts (KSA)

Fee Management Test Plan Summary (Phase II)

(Table below updates automatically based on Sign-off column for individual modules. Do not update this table directly.)

Component of Fee Management	Total Test Items	Total Signed Off as Yes	Total Signed off as Partial	Total Not Signed Off	Percentage Complete
Fee Definition	29	5	4	20	17.24%
Fee Presentation to Student/Staff	5	4	0	1	80.00%
Fee Assessment/Reassessment	11	0	0	11	0.00%
Fee Assessment within rule logic	23	0	0	23	0.00%
FM Testing Totals:	68	9	4	55	97.24%

Kuali Student Accounts (KSA)

Formal Test Plan for Fee Management: Fee Definition

Test Case Number	Description	Requirements Ref. Num.	Tested by	Tested Date	Sign-off (Yes/No)
FM-0001	Define two fees with alpha/numeric Fee Transaction Codes with different amounts.	FM.1.0.1			Yes
FM-0002	Modify the two fees so that they have different terms.	FM.1.0.1			Yes
FM-0003	Modify the two fees so that they have different sessions.	FM.1.0.1			Partial
FM-0004	Modify the two fees so that they apply to different courses.	FM.1.0.1			Partial
FM-0005	Modify the two fees so that they apply to different majors.	FM.1.0.1			Yes

Project Structure

- What is NOT included in the project?
 - Technical items
 - CRM system integration
 - Email / Texting infrastructure
 - Reporting features
 - Functional items
 - Services currently be developed elsewhere in KS
 - BBAY
 - CSS Profile
 - Institutional Methodology
 - Clock Hours

Project Structure

- Discussion on detailed requirements for Phase 1
 - Product Manager to build requirements list by **July 18**
 - Assisted by Functional Council
 - Comment and review period is **July 21 – 30**
 - Finalized and turned over to PDT by **August 1**
- Project Plan discussion for Phase 1
 - Typical design, development and test cycles
 - Development sprints (typically 2 weeks)