

Kuali Project
Status Report for week ending 6/23/06

I. Overall Project Status

A. Key accomplishments this week

1. Financial eDocs team together in Ithaca this week and last week.
2. Year End TOF, DI, and GEC documents ready for testing.
3. Jerry has made very good progress on the BA document. This was an issue in the last PM status but now appears to be under control and should be ready for testing by July 5th.
4. GL Team completed Phase I org reversion changes as requested by KFC.
5. Reviewed QA Period project plan with DMs, assigned resources to teams, and will share the plan after a few finishing touches are made.
6. Scott setup accessibility planning with Center for Adaptive Technology at Indiana.
7. Dennis Friends from Cornell will join the team as a developer starting July 1. Dennis has already begun working with the eDoc developers while they are gathered in Ithaca.

B. Plans for next week and key short-term milestones

1. COA – resolve remaining bugs prior to June 30th freeze date.
2. Finish flexible bank offset enhancement
3. Finish GLCP document
4. Testing and bug fixing in preparation for July 15 Epic release

C. Risks and Issues

1. New Issues
 - (a) Concerns about replacing Aaron as DM of Financial eDocs, DM of KNS, and DM rep on the Usability Committee.
2. Issues previously reported
 - (a) Aaron Godert, DM for Financial Transactions, has accepted a new position at Cornell starting 7/1.
 - (b) A significant amount of code needs to be written and tested between now and 6/30. We will have to work very hard to avoid having development work seeping into the 3-month QA Window. This still seems workable at this point.
 - (c) Developer resource shortage continues to be a problem for KRA deliverables

D. Project Manager Comments

1. We remain on track for 6/30 deliverables. We now also have a plan of attack for the QA period beginning in July in the form of a project plan and resource assignments. So, we should hit the ground running and will work furiously to deliver Phase I by 9/29.
2. I am working with the team to determine a transition plan for Aaron Godert's responsibilities as he begins his new job on July 1. It will be a challenge during the QA period without Aaron who has been leading the Financial eDocs development effort, the Nervous System development effort, and was the technical rep on the Usability Committee. It is difficult to bring in a new DM and get them up to speed in order to lead the Financial eDoc team effectively during QA. I'm looking internally for possible candidates that can step in and help immediately.

II. Project Team Detailed Reports

A. Chart of Accounts (DevManager: Randall Embry^{IU}, Lead SME: Bill Overman^{IU}; Bus Analyst: Dick Barber^{r*smart}; Developers: Andrew Holloman^{UA}, Warner Onstine^{UA}, Ralph Olstad^{SJD})
Expected progress by 6/29/2006:

Team:

1. New functionality complete
2. Ready for QA phase

Progress

Resolved 16 JIRA tasks in past week; there are currently 158 outstanding tasks. Of these, 38 are planned for Phase 1B and 120 for the QA phase.





Next Steps

1. continued development
2. begin bug fixing

Issues

several last minute distractions: OJB, preparation for unplanned Spring upgrade, assisting with configuration management, network slowness between Arizona and Indiana

Milestones: Primary Phase IB tasks

1. Global Documents
 - (a) Global Account
 - (b) Global Account Delegate
 - (c) Object Code multiple year/chart
2. Object Code Restrictions 
3. Organization Extensions & Enhanced Inquiry screen
4. Organization Reversion
5. Program Code Enhancement 
6. Custom Attribute testing 
7. Active code for all maintenance documents
8. Side by Side copy (like edit) 

B. General Ledger (Dev Manager: Jay Sissom^{IU}; Lead SME's: Joan Hagen^{IU}, Vince Schimizzi^{MSU}; Bus Analyst: Steve Stein^{CU}; Developers: Broc Nelson^{r*smart}, Laran Evans^{CU}, Bin Gao^{MSU}, Shawn Choo^{IU}; Testing Coordinator: Sterling George^{IU})

1. *Progress*

- (a) See "This Week's Progress" at <https://test.kuali.org/confluence/display/KULGL/06-22-2006>
- (b) Org Reversion (next year version) written.
 - (i) The job was written to allow any number of categories.
 - (ii) Categories don't need to be written in Java, but can be if necessary

- (iii) Org Hierarchy is supported using a global org reversion chart document
- (c) Development on the following items continuing
 - (i) Collector
 - (ii) GL Error Correction Document
 - (iii) ICR Enhancement
 - (iv) Balance Inquiry bug fixes
 - (v)

2. *Next Steps*

- (a) See Next Week's workload at <https://test.kuali.org/confluence/display/KULGL/06-22-2006>
- (b) Continue working on parallel/load test of Poster

3. *Milestones*

- (a) Org Reversion was written with all features requested by KFC (except budget year features)

4. *Issues*

- (a) None at this time

C. Financial Documents (Dev Managers: Red and Blue Teams: Aaron Godert^{CU}, Purple Team: Brian McGough^{IU}, Lead SME's Joan Hagen^{IU}, Vince Schimizzi^{MSU}; Bus Analysts: Red Team: Arthur Mintz^{CU}, Blue and Purple Team: Dick Barber^{r*smart}; Developers: Red Team: Wes Price^{UH}, Laran Evans^{CU}, David Beutel^{UH}, Blue Team: Leo Przybylski^{UA}, Purple Team: Jerry Neal^{IU}, Matthew Aynalem^{UH}, Ailish Byrne^{IU}; Testing Coordinator: Kymber Horn^{UA})

1. *Progress*

- (a) See "This Week's Progress" at <https://test.kuali.org/confluence/display/KULEDOCS/6-22-2006>
- (b) See [Ithaca Face-to-Face - 6-12-2006 to 6-23-2006](#)
- (c) Leo finished the YE GEC document; finishing up auto-generated DI document for AV recodes
- (d) Wes wrapped up cash drawer totaling for the CMD
- (e) David worked on the Flexible Bank Offset enhancement; fixed some bugs
- (f) Matthew finished the YE TOF and the YE DI documents; help finish up the balancing rules refactoring; fixed bugs
- (g) Aaron fixed bugs with GL posting errors
- (h) Kymber and team continued testing
- (i) SME group continued clarifying requirements

2. *Next Steps*

- (a) See "Next Week's Workload" at <https://test.kuali.org/confluence/display/KULEDOCS/6-22-2006>
- (b) See [Ithaca Face-to-Face - 6-12-2006 to 6-23-2006](#)
- (c) Leo finishes up auto DI generation for the AV recode
- (d) Wes fixes bugs
- (e) David finishes up the flexible bank offset enhancement
- (f) Matthew fixes bugs
- (g) Aaron fixes bugs
- (h) Testers continue testing scenarios

3. *Milestones*

- (a) YE TOF ready for preliminary testing
- (b) YE DI ready for preliminary testing
- (c) YE GEC ready for preliminary testing

4. *Issues*

D. Workflow (Dev Manager: Brian McGough^{IU}, Lead SME: Damon Dorsey^{IU}).

1. *Progress*

- (a) Working on 2.2 release for July 8

2. *Next Steps*
 - (a) Working on 2.2 release for July 8
- E. **AP and Purch (Dev Manager: Laura Kress^{IU}, Lead SME's: Cathy Salino^{CU}, Jennifer Foutty^{IU}; Developers: Chris Kirschenman^{SJD}, Naser Alavi^{MSU}, Cathy Tan^{MSU}, Heather Stapleton^{IU}, Rich Pierce^{IU}, David Terret^{IU}, David Elyea^{IU})**
1. *Progress*
 - (a) Ongoing electronic invoice testing with Concerto and Fisher Scientific. Will implement Fisher Scientific in production on July 17th.
 - (b) Continued testing and bug fixing for July 15th release.
 - (c) Finalizing development on full order discount and trade-in functionality.
 2. *Next Steps*
 - (a) Testing and bug fixing for July 15th release.
 - (b) Planning and set-up tasks for July team development session.
 3. *Issues*
 - (a) Two-week team development session on the "kualification" of EPIC to be held the weeks of July 17th and July 24th.
- F. **Research Administration-Pre-Award (Dev Manager: Lora O'Connor^{IU}; Lead SME: Jim Becker^{IU}; Pre-Award Business Analyst: Lori Schultz^{UA}; Developers: Terry Durkin^{IU}, Philip Berg^{IU}, Geoff McGregor^{IU})**
1. *Progress*
 - (a) Continue work on Budget Re-factoring:
 - (i) Indirect Costs
 - (ii) Cost Share
 - (iii) Permissions
 - (iv) Bug fixes
 - (b) Terry and Lora attended Quali-COEUS Technical infoshare at IU
 - (c) Jason McKerr and Scott Kveton have resigned from OSU - see <http://oregonstate.edu/dept/ncs/newsarch/2006/Jun06/opensource.html>
 - (d) Ongoing analysis of Routing Form needs
 2. *Next Steps*
 - (a) Continue with Budget Re-factoring tasks
 - (i) Once the Fiscal Year Changes in KULDEV are made, KRA developers will need to re-integrate the official sh_univ_date_t classes and services into the code
 - (ii) Prepare for QA period- Load Testing, Performance Testing, RI changes, Code clean-up, Remaining Maintenance Docs
 - (iii) Complete Indirect Cost, Cost Share and Permissions by June 30
 - (b) Continue with analysis of Routing Form needs
 - (c) Paul will continue working on testing and testing scenarios – Output (PHS 398, PHS 2590, generic: low, medium, high) and Audit Mode
 - (d) Lori will continue working on Routing Form specifications and presenting issues/questions to the KRA Committee
 - (e) Lori will continue working on Budget Help Documentation
 - (f) Geoff will be working on IUSM/DSS views
 3. *Issues*
 - (a) Functional testing has slowed down due to year-end processing

G. *Research Administration-Post Award – C&G (Acting Dev Manager: Lora O'Connor^{IU} Dev Manager: TBD; Lead SME: Jim Becker^{IU}; Post-Award Business Analyst: Bethany Davis^{IU}; Developers: None at this time)*

1. *Progress*
 - (a) Lead SME on vacation
2. *Next Steps*
 - (a) Continue analysis of FIS functionality
 - (b) Meeting scheduled with Jay Sissom, Jim B., Lora to discuss GL / C&G components
3. *Issues*
 - (a) Awaiting additional specifications and information

H. *QA Manager Report – Scott Heise^{IU}*

1. *Progress*
 - (a) Worked with Jim and Phil on the QA Period project plan
 - (b) Finished testing license library list
 - (c) Began posting licenses to CVS
 - (d) Met with IU's Adaptive Technology Center and initiated Accessibility review
 - (e) Assisted with QA Period resource planning
2. *Next Steps*
 - (a) Continue Accessibility testing process
 - (b) Continue Open Source License review tasks
 - (c) Continue Kualu U. coordination
 - (d) Assist with QA Period resource planning
 - (e) Discuss Unit Tests with DMs
3. *Issues*

I. DSS/Reporting

J. Labor Ledger

K. Capital Asset Management

L. Contracts & Grants

M. Endowment

N. A/R

O. Budget