

Kuali Project
Status Report for week ending 3/3/06

I. Overall Project Status

A. Key accomplishments this week

1. Financial eDocs team F2F meeting in Hawaii this week and next.
2. Chart eDocs are in testing and bug fixing mode at this point.
3. GL finished Scrubber reports/error testing. Created Poster tests for entry, reversal, and balance
4. Testers have begun testing Disbursement Voucher.
5. Work has begun on writing standard reports.
6. Scott posted QA Plan and created a preliminary test plan for Chart of Accounts testing
7. Work on hosting environment for “Kuali Test Drive” is underway.
8. Usability Committee met and has begun prioritizing usability issues.
9. Created “Kuali Announcements” email signup list on Kuali project site.

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

1. Full steam ahead on testing of COA documents.
2. Finish Balance by Consolidation and implement scrubber tests, and build BRTE jobs for nightly batch (GL)
3. CR ready for testing by 3/3.
4. Need to develop a “Kuali Test Drive ‘How to’” page that explains the purpose of the site, data refresh schedules, and instructions on how to use the site, FAQs, etc. First draft due by 3/1.
5. Establish production-like hosting environment for “Kuali Test Drive” by 3/17.
6. Code Freeze scheduled for 3/15 in preparation for 3/31 deliverable. No new functionality will be added beyond this point in order to focus on critical bug fixing, tuning, and performance testing.

C. Risks and Issues

1. New risks and issues
 - (a) Multiple people running/debugging tests have caused conflicts across teams. This is slowing down test development, particularly for GL team. A solution needs to be found to this quickly. Jay is working on this until it is solved.
 - (b) Continued slowness in test environment. Ailish is working to move some services over to a new server in order to free up resource. Developers are also looking for tuning opportunities as time allows. We are also documenting potential trouble spots for future tuning when time allows.
 - (c) Functional Testing stalled a bit on Chart of Accounts. Test plan and meetings this week got things back on track. Issues was raised in this week’s KFC meeting.
 - (d) One of our OSU developer resources on KRA has resigned. OSU will work on finding a replacement as soon as possible.
2. Previously reported risks and issues
 - (a) Performance of “Kuali Test Drive” site. We won’t have much time for performance testing and tuning. We will attempt to reserve some time for our most experienced developers to work on “tuning” tasks between 3/15 and 3/31 if time allows. Most likely will also need to govern the number of users at a given time.
 - (b) Concerns about dependencies on Jerry’s time for fixing NS bugs. We need to broaden our expertise in this area when time allows. Broader expertise may need to wait until after 3/31.
 - (c) Amount of time for GL testing will be very tight. Will have a better sense once testing begins.

D. Project Manager Comments

1. I remain comfortable that we will deliver on our 3/31 objectives in terms of application functionality. The biggest concern is how much time we will have for tuning the application so that it performs at an acceptable level.
2. Timing of the Face-to-face meeting in Hawaii is good given our fast approaching deadline.

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}, Shawn Choo^{IU})

1. *Expected Progress by 3/9/06*

Andrew:

1. Implement Authorization Controls & Mechanism on Maint Docs
2. Other items from [KULCOA-443](#)[■] as needed
3. Maintenance documents & bug fixing

Warner:

1. Implement fix for ObjectCodeCurrent lookup on Chart [KULCOA-416](#)[■]
2. Other items from [KULCOA-443](#)[■] as needed
3. Maintenance documents & bug fixing

Randall

Maintenance documents & bug fixing

Ralph:

Maintenance documents & APC rules

Shawn Choo:

fix date entry

expand business rules (Continuation Account Selection)

Milestones: below are the high level milestones to be tracked by future reports

1. EDocs - Andrew made a solid first pass fix at choosing users by username instead of cryptic ID numbers-- we will seek usability testing to perfect it. Ryan and Eric have been extremely helpful with setting up workflow for us.
2. Maintenance Table Documents - Warner checked in a way to associate business rules using the data dictionary, no programming required. Ralph continues to steadily crank through the remaining documents. Jeff & Teresa have been responsive and helpful.
3. Testing - tester feedback is increasing - there were 23 bug reports filed this week, and at least two new names in the list of reporters (from Arizona and MSU)
4. Global Documents - low priority
5. Enhancements - low priority

Progress

Andrew

1. Document locks inappropriately on save then route [KULCOA-388](#)[■]
2. Kual>User/Universal User Usability Improvements
 1. [KULCOA-387](#)[■]
 2. [KULCOA-338](#)[■]
 3. [KULCOA-236](#)[■]

Warner

1. Implemented KULCOA-422 - Add ApcRules functionality to maintenance documents [KULCOA-422](#)
2. Worked on [KULCOA-416](#), which helped to determine the proper approach to fixing.

Next Steps

1. we have about 25 outstanding development tasks
2. we have around 100 outstanding bugs that have been identified

Issues

B. General Ledger (Dev Manager: Jay Sissom^{IU}; Lead SME's: Joan Hagen^{IU}, Vince Schimizzi^{MSU}; Bus Analyst: Steve Stein^{CU}; Developers: Tony Potts^{r³smart}, Laran Evans^{CU}, Bin Gao^{MSU}; Testing Coordinator: Sterling George^{IU})

1. Progress

- (a) Finished Scrubber Reports
- (b) Finished Scrubber Error Testing

2. Next Steps

- (a) Finalize new design on Flexible Offset enhancement
- (b) Finish Balance Inquiries
- (c) Continue GL Testing
- (d) Start nightly batch running on test.kuali.org

3. Issues

Multiple people running/debugging tests have caused conflicts. This is slowing down test development. A solution needs to be found to this quickly. Jay is working on this until it is solved.

4. Developer Goal Status for past week

- Bin
 - Finish Balance by Consolidation **Hope to finish by Monday**
- Jay
 - Build BRTE jobs for nightly batch **BRTE is not ready on server so this hasn't been started**
 - Build Poster Tests for GL Entry, GL Reversal, GL Balance **Finished**
- Laran
 - Implement Scrubber tests for offset generation **Not Finished - underestimated the task**
- Tony
 - Finish Scrubber Reports **Finished**
 - Begin Sufficient Funds Rebuild unit testing **Started**

5. Developer Goals for next week

- Bin
 - Build unit testing framework for balance inquiries
- Jay

- Build solution to integration testing conflicts
- Laran
 - Implement Scrubber tests for offset generation
- Tony
 - Finish Sufficient Funds Rebuild unit testing

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) RED and BLUE TEAMS – Godert
- (b) TP eDoc devs at f2f at UH
 - (i) See [Hawaii Face-to-Face - 2-27 to 3-10](#) work breakdown for progress this week
- (c) Kymber, Arthur, Joan, and Damon continue clarifying requirements in response to reported bugs
- (d) Aaron updated project plans to reflect 3/31 deliverables
- (e) DV and PCDO TEAM – McGough
- (f) Jerry and Matthew continued work on core TP eDoc bugs from user testing
- (g) Matthew continued work on sufficient funds checking for TP eDocs; on track

2. *Next Steps*

- (a) RED and BLUE TEAMS – Godert
- (b) See [Hawaii Face-to-Face - 2-27 to 3-10](#) work breakdown for next steps this and next week
- (c) Start sufficient funds integration for eDocs
- (d) Testers continue testing
- (e) PURPLE (DV and PCDO docs) TEAM - McGough
- (f) Jerry and Matthew continue work on core TP eDoc bugs
- (g) Matthew finishes work on sufficient funds checking

3. *Issues*

- (a) Slowness issues on test.kuali.org

4. *Milestones*

- (a) Testers started testing DV
- (b) Accounting line override functionality complete

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

1. *Progress*

- (a) Continued Kuali integration work
- (b) Some performance tuning work

2. *Next Steps*

- (a) Continued Kuali integration work

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}, Jay Sissom ^{IU}, Heather Stapleton ^{IU}, Rich Pierce ^{IU}, David Terret ^{IU}, David Elyea ^{IU})

1. *Progress*

- (a) Testing changes scheduled for March release (items that are RFT include: PREQ by dollars, import line items, improved notes functionality, construction order changes, and changes to allow encumbering in future fiscal year).
- (b) Testing various minor bug fixes.
- (c) Development underway on e-invoicing, CAMS asset collection document, various bugs, and minor improvements.
- (d) Continued functional design for purchasing restricted materials, handling trade-in's, and handling full order discounts.

2. *Next Steps*

- (a) Continue testing for March release.
- (b) Continued development for large items for March release (e-invoicing, CAMS asset document) and various minor improvements/bug fixes.
- (c) Continue to document differences between Kuali and EPIC for future integration discussions.

3. *Issues*

F. **Research Administration (Dev Manager: Lora O'Connor^{IU} ; Lead SME: Jim Becker^{IU} ; Pre-Award Business Analyst: Lori Schultz^{UA} ; Post-Award Business Analyst: Bethany Davis^{IU} ; Developers: Terry Durkin^{IU}, Philip Berg^{IU}, Geoff McGregor^{IU}, Lars Lohn^{OSU}, Michael Morgan^{OSU}, North Krimsly^{OSU} Clint Jones^{MSU})**

1. *Progress*

- (a) Continued work on Budget re-factoring tasks:
 - Completed/In Testing: Budget Parameters, Template, Overview, Non-Personnel Code Reviews and Developer Testing Scheduled: Non-Personnel Copy-Over, Fringe Rate (Semesters vs. Quarters) enhancement
 - Near Completion (moved back to 3/13/06): Modular, Personnel, IDC,
 - In Progress: Cost Share
 - To Be Done: Audit Mode, Output, Output XSLT, Permissions/Authorizations
- (b) ERA Release on 3/2 at 6am
- (c) Addressed KRA bug fixes for Budget Parameters and Non-Personnel
- (d) Lora and Terry met with Lori to discuss personnel appointment types versus personnel grids related to Delta
- (e) Jim continued discussion with the KRA subcommittee on the two remaining enhancements
- (f) Lori reviewed Audit Mode and Output specifications with the KRA subcommittee
- (g) UXG team provided with a copy of the timeline for C&G Phase IIA activities as well as a screen shot of the proposal document

2. *Next Steps*

- (a) Continue work on Budget re-factoring
- (b) Lori will continue her analysis of the Agency specific data related to SF 424 (R&R) for Routing Form
- (c) Lori will start work on the Permissions/Authorizations specification
- (d) Paul will continue testing Parameters and Non-personnel
- (e) Jim will continue to update the KRA enhancements list to ensure that it is up-to-date
- (f) Developers will address any new KRA bugs found in testing for Parameters and Non-Personnel
- (g) Lora will follow-up with UXG team on Routing Form design samples
- (h) Philip and Lora will review Non-personnel copy-over functionality with Paul to ensure testing goes smoothly
- (i) Lora will continue to work on the Routing Form timeline
- (j) Lora will start updating information on Confluence under Research Administration – Post-Award

3. *Issues*

- (a) OSU is losing a developer that is assigned 100% to KRA

G. QA Manager Report – Scott Heise^{IU}

1. Progress

- (a) Created a preliminary Functional Test Plan for Chart of Accounts
- (b) Continued functional test plan review
- (c) Followed up on Unit Test errors and failures
- (d) Followed up on Kualu U. testing feedback
- (e) Completed the QA Plan and posted it in Confluence

2. Next Steps

- (a) Monitor functional testing effort for March deliverables as code freeze approaches
- (b) Continue functional test plan review
- (c) Firm up a Kualu U. testing plan
- (d) Follow up on the open source license review process with R-Smart

3. Issues

- (a) Functional testing progress is lagging in some areas

H. DSS/Reporting

- 1. Marty Schilke named as a development resource to assist with rewriting standard reports. Work has begun.

I. Labor Ledger

J. Capital Asset Management

K. Contracts & Grants

L. Endowment

M. A/R

N. Budget