

Kuali Project
Status Report for week ending 4/7/06

I. Overall Project Status

A. Key accomplishments this week

1. Final Kuali Test Drive deployment took place on 4/5. All scenarios from Driver's Manual are functional.
2. Began planning and working on Phase IB deliverables for 6/30.
3. KRA Budget Refactoring moving to REG for functional testing on 4/7
4. OSU developers attended Java Training and F2F meetings in Bloomington
5. GEC ready for testing with deployment to REG on 4/7
6. JIRA/Confluence will be moved to IU servers on 4/7
7. Usability Committee will now meet on a regular basis (bi-weekly) to prioritize usability issues.

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

1. Kuali Days 4/10 and 4/11. Demo of Kuali Test Drive
2. Begin working on remaining Phase I development tasks. Some developers have started already.

C. Risks and Issues

1. Previously reported risks and issues
 - (a) We are still experiencing some memory issues in the test environments. We are continuing to investigate the source of the problem.
 - (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.

D. Project Manager Comments

1. I'm looking forward to the Kuali Test Drive demo at Kuali Days. This is an important event for Kuali Financials.
2. We're now focused on development tasks for the remaining Phase I deliverables. Project plans, staff assignments, etc are being worked out. Our next big deadline is June 30th.
3. This week we discussed plans with developers for getting local database installations. This will help developers at Hawaii and other locations that are experiencing slow connections causing productivity challenges. With Test Drive and the JIRA/Confluence migration behind us, this is the next priority for the CM.
4. With the DMs, I discussed trying to establish a standard and consistent testing framework for consistent and effective communications between development teams, functional teams, and testing staff. We're exploring ways to improve in this regard.

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})

Expected progress by 4/13/2006:

code cleanup and miscellaneous bug fixes

Progress

Resolved 28 JIRA tasks in past week; there are currently 91 outstanding tasks, including all Phase 1B tasks.

Next Steps

Project planning, scheduling, identifying dependencies

Milestones: Primary Phase 1B tasks

1. Global Documents

- Global Account
- Global Account Delegate
- 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: Tony Potts^{r*smart}, Laran Evans^{CU}, Bin Gao^{MSU}; Testing Coordinator: Sterling George^{IU})

1. *Progress*

(a) Unit Testing for all Phase 1a batch processes completed

(b) Phase 1a batch running successfully in test drive environment

(c) Balance Inquiry Screens tested by users and incorporated in test drive environment

2. *Next Steps*

(a) Begin working on Phase 1b deliverables

3. *Issues*

(a) None at this time

4. *Developer goals for past week*

- Bin
 - Build unit tests for balance inquiries **Finished**

- Balance Inquiry User Modifications **Finished**
- Jay
 - Finish Poster Testing **Finished**
 - Finish ICR Generation Testing **Finished**
 - Balance Inquiry User Modifications **Finished**
- Laran
 - Balance Inquiry User Modifications **Finished**
- Tony
 - Balance Inquiry User Modifications **Finished**

5. *Developer goals for next week*

- Bin
 - Begin developing Flexible Offset Enhancement
- Jay
 - Build Purge Batch Job
- Laran
 - Build non-labor functionality of Genesis Job
- Tony
 - Begin developing ICR Encumbrance Enhancement

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 <http://fms.dfa.cornell.edu:8080/confluence/pages/viewpage.action?pageId=12383>
- (b) Announcement: Matthew is now a member of Aaron's team
- (c) Several critical KTD fixes were put in place
- (d) Leo worked on the GEC document
 - (i) Leo and Aaron met to review the GEC document
 - (ii) Leo finished up documentation and coding for the GEC
- (e) Wes
 - (i) Fixed bugs in the CMD
 - (ii) Fixing up broken unit tests
- (f) David
 - (i) David and Aaron met to review the IB document
 - (ii) David finishing up the documentation and coding for the IB
- (g) Matthew
 - (i) Pair programmed with David to spin up on TP eDocs some more
 - (ii) Fixed some TP eDoc bugs - suff. funds checking, new budget year rules
- (h) Aaron

- (i) Updated project plans for remaining Phase I deliverables
- (ii) Reviewed specs for remaining documents
- (iii) Spun up on remaining portions of the CMD with Arthur
- (iv) Met with teammates to review their active documents
- (i) Kymber and team continued testing
- (j) Kymber, Joan, Damon and Arthur continue clarifying requirements in response to reported bugs
- 2. *Next Steps*
 - (a) See next week's work at
<http://fms.dfa.cornell.edu:8080/confluence/pages/viewpage.action?pageId=12383>
 - (b) Leo
 - (i) Holds code review for GEC
 - (ii) Fixes bugs for GEC
 - (iii) Starts in on finishing up the Non-Check Disbursement document
 - (c) Wes
 - (i) Finishes up fixing unit tests
 - (ii) Starts in on finishing up the CMD
 - (iii) Continues fixing CR and CMD bugs
 - (d) David
 - (i) Finishes up IB; gets out to REG for testing
 - (ii) Holds code review for IB
 - (iii) Starts in on finishing up the SB document
 - (e) Matthew
 - (i) Meets with Aaron on Friday to spin up on the DI document
 - (ii) Finishes up the DI document
 - (f) Testers continue testing scenarios
 - (i) Kymber preparing for GEC and IB testing
- 3. *Issues*
 - (a) None this week
- 4. *Milestones*
 - (a) GEC ready for testing with deployment to REG on 4/7/2006

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

- 1. *Progress*
 - (a) Continued Kuali integration 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) On-going electronic invoicing testing with Corporate Express and Fisher Scientific.
 - (b) Continued development on CAMS asset collection document.
 - (c) Continued functional design for handling trade-in's and full order discounts.
 - (d) Working on technical design for restricted material purchases.
 - (e) Continuing technical analysis on Kuali "commodity code" enhancement.
 - (f) Continuing to work on mock screens for "kualified" vendor system.
 - (g) Development on several smaller issues June release.
- 2. *Next Steps*
 - (a) On-going testing for e-invoicing.
 - (b) On-going development for CAMS asset collection document.

- (c) Continued work on mock screens for "kualified" vendor system.
- (d) Technical design for Kuali "commodity code" enhancement.

3. *Issues*

- (a) None this week

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} , Michael Morgan^{OSU} , North Krimsly^{OSU} Clint Jones^{MSU})**

1. *Progress*

- (a) Continued work on Budget re-factoring tasks:
 - (i) Completed/In Testing: Budget Parameters, Template, Overview, Non-Personnel
 - (ii) Moving into REG for Functional Testing on April 7th : Non-Personnel Copy-Over, Modular Budget, Personnel
 - (iii) In Progress: Cost Share-ready by April 14 REG build, Indirect Cost-ready by April 14 REG build, Audit Mode-ready by April 21 REG build
 - (iv) To Be Done: Indirect Cost-Multiple Bases Enhancement, Output/Output XSLT (ensuring the current XSLTs work in Kuali), Permissions, KualiInteger
- (b) Addressed KRA bug fixes discovered by internal testing and user feedback JIRA tasks
- (c) Mike and North on-site for Java Training Class and face time
- (d) MSU announced plans to replace Clint with a full-time developer within the next 5 to 6 weeks; Clint will work with the new developer for 1 to 2 months
- (e) North, Jason, Jim T. and Lora met to discuss issues, project plans and COI
- (f) North, Jim B. and Lora met to discuss COI background information, specification gathering and future plans
- (g) UXG completed Version 6 of the Routing Form Design
- (h) KRA code merged back into HEAD with only a few style issues surfacing
- (i) Lora updated Routing Form plan on Confluence
- (j) Lora reviewed Routing Form functionality and plans with developers

2. *Next Steps*

- (a) Continue work on Budget re-factoring
- (b) Lora and Terry will attend Kuali Days on April 10th and 11th
- (c) Request info-share on Additional / Custom Attributes from one of the Financial team members (possibly Aaron)
- (d) Review analysis of the Agency specific and SF 424 (R&R) data for Routing Form
- (e) Lori and Paul will be on-site April 12th
- (f) Lori will meet with Terry and Lora on April 12th to discuss Permissions/Authorizations
- (g) Paul will meet with Lora to discuss Testing on April 12th
- (h) Paul will continue working on testing scenarios
- (i) All developers will address any new KRA bugs
- (j) Design Critique of KRA Routing Form on April 12th (IU and AZ) and April 19th (KRA Committee)
- (k) North will speak to Rich Holdren about his role as a Business Analyst (and its impact on the development team) as well as the overall priority of the COI initiative
- (l) North will speak to Rich Holdren about adding OSU functional testers to the testing team
- (m) North or Mike will speak to Jason about having a "centrally local" database server for Kuali/KRA, as identified in the weekly Kuali Developer Meeting

3. *Issues*

- (a) There may be issues with performance on Personnel and Non-Personnel. Terry and Lora spoke with Brian about an approach for locating the possible bottlenecks.

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

1. Progress

- (a) KRA committee reviewed initial draft of the Proposal Maintenance Specification
- (b) Arthur provided feedback to Bethany on the draft of the Proposal Maintenance Specification
- (c) Lora reviewed initial draft of the Proposal Maintenance Specification and formulated several questions for Jim and Bethany
- (d) Organization, Project Director, Agency and Subcontractor Lookups / Maintenance documents already in existence; Workflow rules will need to be added for Project Director, Agency and Subcontractor

2. Next Steps

- (a) Lora will follow-up with UXG team on mock specifically for the Proposal Maintenance Specification
- (b) Bethany will update the Proposal Maintenance Specification and provide answers to questions
- (c) Bethany will begin work on the Proposal Diary Specification

3. Issues

- (b) None

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

1. Progress

- (a) Tested Kualu Test Drive demo
- (b) Began planning the expansion of th QA process

2. Next Steps

- (a) Continue expansion of the QA process
- (b) Get benchmark for Unit Test coverage

3. Issues

- (a) Test Drive susceptibility to corruption

I. DSS/Reporting

- 1. Marty Schilke continues to work on rewriting standard reports for Kualu.

J. Labor Ledger

K. Capital Asset Management

L. Contracts & Grants

M. Endowment

N. A/R

O. Budget