Part 1 - Project Charter

**Project Name:** Employee Benefits Portal System

**Project Description:** 

This project is focused on the development of the Employee Benefits Portal, such that

the employee benefits and payroll experience is greatly improved. This project is an

important component of the upcoming merger integration objectives. The project will

produce a working portal system that will allow employees to access and control their

personal information. The intended information and documentation will be readily and

directly accessible to the employees and the human resources group through this

system at any time. Furthermore, this system will serve as the single point of

management for all employee benefits such as medical, dental, vision, prescription, flex

spending accounts, and 401K options.

**Project Purpose:** 

To create a centralized management portal such that employees can universally access

and control their benefits information and to lessen the workload of the human

resources group.

**Measurable Objectives and Success Criteria:** 

The MVP must launch in time for the benefits enrollment and must be ready for

use within 2 months.

MVP includes basic benefits and payroll management.

The portal is capable of responding to requests within 2 seconds.

• The portal is compatible with the major browsers: Chrome, Edge, Firefox, Opera,

Safari.

The portal is universally accessible 24 hours a day, 7 days a week.

Portal is accessible to different modes of users:

Employees & Spouses From Home

Multiple Branch Office Locations

Travelling Employees

Portal is comprised of full set of documents:

Benefit Plan Coverage, Enrollment Information, Plan Descriptions

Claim Forms, Links to Provider Dictionaries

FAQs, Government Requirements

Appropriate authentication factors outlined by the company policy are

incorporated such that employees can only access their information and human

resource personnel have administrative capabilities.

Serves as the single point of management for all employee benefits:

Medical, Dental, Vision, Prescription

Flex Spending Accounts, 401K Options

**Summary Milestone Schedule:** 

Sprint 1 Completion: 12/14/2021

Sprint 2 Completion: 12/28/2021

EBP V1.0 - MVP Release: 12/28/2021

Sprint 3 Completion: 01/11/2022

• Sprint 4 Completion: 01/25/2022

• EBP V1.1 Release: 01/25/2022

• Sprint 5 Completion: 02/08/2022

• Sprint 6 Completion: 02/22/2022

• <u>EBP V1.2</u> Release: 02/22/2022

### **Project Budget:**

Currently, the project budget will be estimated for the first 2 releases, which consists of 4 sprints. As the project details document did not provide cost factors, the following calculations are based on many generalizations. Hence, the notion will be that of 10 people working for 8 weeks and a flat rate average of \$100 per hour will be utilized. Thus, it will be \$40,000 per week, translating into a total approximation of \$320,000.

Name of the Product Owner: Group 7

Name of the Project Sponsor: Michael Russell, VP Human Resources

Name of the Scrum Master: Group 7

## **Part 2 - Product Vision**

### **Core Purpose:**

To provide our employees with an awesome interactive experience with regards to managing their information online and to reduce the workload placed on the human resources department.

### **Vivid Description:**

We will create a product that will provide our employees with universal access and control over their personal information and choices. The portal will serve as the single point of management for all employee benefits such as plan coverage, plan descriptions, and enrollment details. Essentially, it will comprise of anything that our employees need regarding their benefits including information documents, thereby assisting the human resources group along the way. Our portal will be accessible 24/7 for various modes of users such as employees and spouses from home, multiple branch office locations, and employees on the go. Through this portal, we will dramatically update the employee benefits and payroll experience. Within the next 5 years, we hope for the portal to become the gold standard with regards to benefits management that other enterprises would want to emulate.

## Parts 3 & 4 - Background Information

## **Prioritized Product Backlog - Entire View:**

A	9	C	. 0	F	G		1	J	K	1.	M	N OPQRSTUVWXY
User Stories/Tasks	User	Required		Story Points (1,2,3,5,8,1)	Business Value Points	Business Value Per	Story Points Current	Story Points Running	Total	[Sprint, Release		
Priority	Stories/Tasks ID	for MVP	Name	,21)	(1,2,3,5,8)	Story Point		Total	Hours	Number		Acceptance Criteria
1	User Story 05	Yes	Change payroll Deductions	- 1	8	8.00	0.00	1.00	128		As an employee I want the ability to display and edit payroll deductions.	Specify payroll deductions for investments, tax and charitable causesHave the option to download a PDF copy my payroll deductions
2	User Story 05	Yes	Ability to Display Pre-tax Deductions	- 1	5	5.00	1.00	2.00	96	[1,1]	As an employee, I would like to view my pre-tax deductions	An employee has the ability to view pre-tax deductionsThe employee can download this report in PDF formatCan view on Andriod device
3	User Story 35	Yes	Employee Validation Rules	1	3	3.00	2.00	3.00	16	[1,1]	As an HR admin, I would like the ability to add employee validation rules	Need to explore and expand this story.
4	User Story 03	Yes	Change W-4 Info	1	3	3.00	3.00	4.00	144	[1,1]	As an employee, I would like the ability to change my W4 information, so the	Have a link to download the W4 form from the benefits portalAbility to upload a signed copy of the W4 to the benefits portalHave the ability to view and download pas
5	User Story 15	Yes	Enter expenses	3	8	2.87	4.00	7.00	84	[1,1]	As an employee, I would like to enter and submit travel and other valid exper	Enter travel and other expenses for approval and reimbursementDisplay a status for each submitted expense – submitted, in process, approved, disapprovedCan att
8	User Story 34	Yes	Allowance for W-2 Hourly Employees	3	8	2.87	7.00	10.00	84	[1.1]	As an HR admin, I would like the ability to add allowance for W-2 hourly emp	Allow HR admin to add allowanceAutomated workflow for manager approvalGenerate a daily allowance report
7	User Story 17	Yes	Annual enrollment of benefits	3	8	2.67	10.00	13.00	120	[1.1]	As a HR Administrator, I want the ability to provide annual enrollment of ben	To be determined
8	User Story 12	Yes	Submit Reimbursable medical expenses	2	5	2.50	13.00	15.00	48	[1.1]	As an employee, I would like to have the ability to enter and requestreimburs	A link to the latest company medical reimbursement policy is available. Enter medical reimbursement details Ability to attach medical bills and reports. Limit to 2 GB of
9	User Story 33	Yes	SOX Audit Compliance Reporting	2		2.50	15.00	17.00	48	[1.1]	As an HR admin, I would like the ability to query and generate audit reports to	Ability to query the employee datastore using a data access toolCreate an compliance audit dashboardAbility to download an audit log related to user access
10	User Story 08	Yes	Ability to Print a Pay-stub Form	2	5	2.50	17.00	19.00	144	[1,1]	As an employee, I would like to ability to print my pay-stub from any pay pe	Provide options to select to the paystub by pay periodAbility to print the paystubHave the ability to download the paystub as a PDF document
11	User Story 37	Yes	Charitable Contribution Tax Savings	1	2	2.00	19.00	20.00	16	[1,1]	As an employee, I would like to understand how much tax savings were gene	Discuss with finance if this is possible
12	User Story 38	Yes	Notification of Changes to Deductions	3	5	1.07	20.00	23.00	32	[1,1]	As an employee, I would like the ability to be notified of any changes to my	Any change to deductions to trigger an email and but if user has opted for but updates
13	User Story 16	Yes	Life Insurance enrollment	3	5	1.87	23.00	28.00	120	(1.1)	As an employee, I would like to enroll for life insurance for myself and my fi	Provide a link to enroll for life insurance via a third-party administratorProvide a single sign on feature to the third-party application
14	User Story 22	Yes	View Employee Stock Purchase Program informs	5	8	1,60	28.00	31,00	180	[2,1]	As an employee, I would like to view the employee stock purchase informati	View the employee stock purchase program documents Resources to explore enrollment in the stock purchase programa. Stock purchase program calculator that pro
15	User Story 23	Yes	Print W-2	5	8	1.60	31.00	38.00	180	[2.1]	As an employee, the information on your W-2 is extremely important when p	View and print Form W-2 in the IRS specified formatiProvide a link to the latest Form W-2 on the Internal Revenue Service websiteList the W-2 forms from the previous
18	User Story 10	Yes	Calo 401k tax savings	2	3	1.50	38.00	38.00	192		As an employee, I want to calculate my 401k tax savings. Would be nice to	
17	User Story 24	Yes	Charitable contribution edit	5	3	0.80	38.00	43.00	160	[2,1]	As an employee, I would like to view, select and elect to contribute charitable	Ability to view, select and contribute to a charity of choiceSubmit a request to add a new charityAuthorize payroll deduction
18	User Story 28	Yes	Update personal profile info	8	- 3	0.38	43.00	51.00	240			Have the option to update the following on the profile:a. Nameb. Photoc. Addressd. Educatione. Trainingf. Skills
19	User Story 41	No	Links to Outside Charitable Contributions	1	8	8.00	51.00	52.00	16			Ability to add a charitable organization of your choiceAbility to set up payroll contributions in % or amountsUpdate the organization wide Charitable dashboard
20	User Story 07	No	Ability to View Pay-stub from any Pay Period	1	3	3.00	52.00	53.00	128			Ability to select the pay period and view the paystub-lave a link to submit a query regarding the paystub
21	User Story 35	No	Usability for Employee Experience	3	8	2.67	53.00	56.00	84		As an employee, I would like the ability to use the portal on a number of dev	
22	User Story 11	No	Request planned vacation	2	5	2.50	58.00	58.00	48			Ability to submit a vacation request to my managerSend an email to the manager with a link to view and approve ordisapprove the vacation request
23	User Story 04	No	Change Investment Options	- 1	2	2.00	58.00	59.00	16			Can view and edit fund allocation Total percentage of allocation should total 100% Link to IRS current 401(k) investment limits is available Have the option to download
24	User Story 13		Set up automatic deposit	2	3	1,50	59.00	61,00	48			Accept the terms and conditions for automatic depositSet up bank account for transfer. Need the bank name, routing number and account numberDisplay a messag
25	User Story 01	No	Maintain vacation/holiday calendar	1	1	1.00	81.00	62.00	18			Ability to create vacation schedule - single or multiple daysAbility to create vacation schedule - single or multiple daysAbility to maintain vacation scheduleAbility to
28	User Story 02	No	Display vacation/holiday calendar	- 1	1	1.00	62.00	63.00	16			When logged into the portal, an employee has the option to view their vacation and flexible holiday schedule. The holiday schedule can be viewed using a date range
27	User Story 09	No	List all paystubs available	2	2	1.00	63.00	66.00	32		As an employee, I would like to view all available paystubs so that I can view	
28	User Story 14	No	Submit education request	3	3	1.00	65.00	68.00	04			Present a form to enter a request for educational opportunity. This form needs to have the following information:a. Type of education professional course, college
29	User Story 20		Set up Health Savings Acct	3	3	1.00	68.00	71.00	128			Single sign on feature enabled for the benefits vendor system to administer the health savings accountProvide a link to policy documents and eligibility.
30	User Story 28		Export to Payroll service	8	8	1.00	71.00	79.00	240			Export profile changes to payroll serviceGenerate exception report for any errorsPerform integration testing with Finance
31	User Story 40	No	Links to Outside Investments	2	- 1	0.50	79.00	81.00	16			As an employee, I would like the ability to link to investments outside my company payroll
32	User Story 39	No	Separate Pop-Up Windows	3	2	0.87	81.00	84.00	32		As a UI designer, I would like to standardize all pop-up windows	Apply company brand style guideTest on supported browsers and mobile devices
23	User Story 18		Enroll for Company Provided Tutorials	3	2	0.87	84.00	87.00	128			Present list of courses and tutorials available for the employee to enrollintegrate single sign on with vendor's learning management system
34	User Story 27	No	Import from payroll service	8	. 5	0.63	87.00	95.00	192			Only HR admin can have access to import from the payroll servicelf the latest payroll run is not available, then send an automated email to financeCapture audit to
35	User Story 21		Add/change dependents		2	0.40	95.00	100.00	160			Ability to add a new dependent informationAbility to remove a dependent/Need the following information for dependents: a Name of the dependent. Date of birth
38	User Story 30		Shop for company logo items	8	2	0.45	100.00	108.00	480			Administrator panel for testing items. ( only HR can access)Employee can browse the catalog and add items to the shopping cartEmployees can check out and pay b
37	User Story 19		Payroll admin entry/update	3	1	0.23	108.00	111.00	128			Only HR admin can have access to the Payroll Admin functionalityTwo-factor authentication requiredCapture audit trail for all admin configuration changes
20	User Story 29	No.	Update Employee Stock Purchase options	13	-	0.23	111.00	124.00	430	[5,3]		Enter the payroll contribution towards employee stock purchaseAuthorize payroll deduction for employee stock purchaseView the history of stock purchaseElect to n
39	User Story 31	No	Wellness program	13	2	0.15	124.00	137.00	720			Provide access to all welness resources Ability to sign up for selected programal natructions to sign up for Dr. on Call AppRecord preventative care visits to earn po
40	User Story 25		Maria Caracteria de Caracteria	- 6		0.20	137.00	142.00	180			A community sourced list of volunteer opportunities The ability to review and approve a volunteer opportunity submissionSend out an email to the employee once the
44	I NAME OF THE OWNER,	No.	Community volunteer options	21		0.05	142.00	163.00	720	[8.3]		
40	User Story 32	760	Quicken download	21	1	0.05	192.00	103.00	120	[6,3]	As an HIX agmin, I would like the ability to download journal entries from Quit	Only HR admin can have access this functionality-Schedule the download on a daily basis, every day at 8:00 p.m. Generate an error report and email notification is

## Prioritized Product Backlog - Split View:

4	A	В	С	D	F	G	Н	1	J	K	L	M	
1	Jser Stories/Tasks Priority	User Stories/Tasks ID	Required for MVP	Name	Story Points (1,2,3,5,8,13,2 1)	Business Value Points (1,2,3,5,8)	Business Value Per Story Point	Story Points Current Completion	Story Points Running Total	Total Hours	[Sprint, Release] Number	Narrative Description	Aco
2	1	User Story 05	Yes	Change payroll Deductions	1	8	8.00	0.00	1.00	128	[1,1]	As an employee I want the ability to display and edit payroll deductions.	Spe
3	2	User Story 06	Yes	Ability to Display Pre-tax Deductions	1	5	5.00	1.00	2.00	96	[1,1]	As an employee, I would like to view my pre-tax deductions	And
4	3	User Story 36	Yes	Employee Validation Rules	1	3	3.00	2.00	3.00	16	[1,1]	As an HR admin, I would like the ability to add employee validation rules	Nee
5	4	User Story 03	Yes	Change W-4 Info	1	3	3.00	3.00	4.00	144	[1,1]	As an employee, I would like the ability to change my W4 information, so that I can	Hav
6	5	User Story 15	Yes	Enter expenses	3	8	2.67	4.00	7.00	64	[1,1]	As an employee, I would like to enter and submit travel and other valid expenses.	Ente
7	6	User Story 34	Yes	Allowance for W-2 Hourly Employees	3	8	2.67	7.00	10.00	64	[1,1]	As an HR admin, I would like the ability to add allowance for W-2 hourly employee	s Allc
8	7	User Story 17	Yes	Annual enrollment of benefits	3	8	2.67	10.00	13.00	120	[1,1]	As a HR Administrator, I want the ability to provide annual enrollment of benefits t	o To t
9	8	User Story 12	Yes	Submit Reimbursable medical expenses	2	5	2.50	13.00	15.00	48	[1,1]	As an employee, I would like to have the ability to enter and requestreimbursable	n A lin
10	9	User Story 33	Yes	SOX Audit Compliance Reporting	2	5	2.50	15.00	17.00	48	[1,1]	As an HR admin, I would like the ability to query and generate audit reports for SO	Abil
11	10	User Story 08	Yes	Ability to Print a Pay-stub Form	2	5	2.50	17.00	19.00	144	[1,1]	As an employee, I would like to ability to print my pay-stub from any pay period.	Pro
12	11	User Story 37	Yes	Charitable Contribution Tax Savings	1	2	2.00	19.00	20.00	16	[1,1]	As an employee, I would like to understand how much tax savings were generated	bDisc
13	12	User Story 38	Yes	Notification of Changes to Deductions	3	5	1.67	20.00	23.00	32	[1,1]	As an employee, I would like the ability to be notified of any changes to my payrol	Any
14	13	User Story 16	Yes	Life Insurance enrollment	3	5	1.67	23.00	26.00	120	([1,1]	As an employee, I would like to enroll for life insurance for myself and my family n	n Pro
15	14	User Story 22	Yes	View Employee Stock Purchase Program information	5	8	1.60	26.00	31.00	160	[2,1]	As an employee, I would like to view the employee stock purchase information an	d Vie
16	15	User Story 23	Yes	Print W-2	5	8	1.60	31.00	36.00	160	[2,1]	As an employee, the information on your W-2 is extremely important when prepar	ii Vie
17	16	User Story 10	Yes	Calc 401k tax savings	2	3	1.50	36.00	38.00	192	[2,1]	As an employee, I want to calculate my 401k tax savings. Would be nice to have the	Vie
18	17	User Story 24	Yes	Charitable contribution edit	5	3	0.60	38.00	43.00	160	[2,1]	As an employee, I would like to view, select and elect to contribute charitable don	a Abil
19	18	User Story 28	Yes	Update personal profile info	8	3	0.38	43.00	51.00	240	[2,1]	As an employee, I want to the option to update my profile information so that it re	flHav
20	19	User Story 41	No	Links to Outside Charitable Contributions	1	8	8.00	51.00	52.00	16	[2,1]	As an employee, I would like the ability to register my charitable organization for a	u Abil
21	20	User Story 07	No	Ability to View Pay-stub from any Pay Period	1	3	3.00	52.00	53.00	128	[2,1]	As an employee, I would like to view my paystubs for any period during the last 2 y	e Abil
22	21	User Story 35	No	Usability for Employee Experience	3	8	2.67	53.00	56.00	64	[3,2]	As an employee, I would like the ability to use the portal on a number of devices. A	Con
23	22	User Story 11	No	Request planned vacation	2	5	2.50	56.00	58.00	48	[3,2]	As an employee, I would like to submit a request for vacation to my manager. The	reAbil
24	23	User Story 04	No	Change Investment Options	1	2	2.00	58.00	59.00	16	[3,2]	As an employee, I want the ability to display and edit retirement account investme	r Can
25	24	User Story 13	No	Set up automatic deposit	2	3	1.50	59.00	61.00	48	[3,2]	As an employee, I would like to ability to set up automatic deposits for payroll and	r Aco

4	A	В	С	D	F	G	Н	1	J	K	L	M
26	25	User Story 01	No	Maintain vacation/holiday calendar	1	1	1.00	61.00	62.00	16	[3,2]	As an employee, I can create, update and delete my vacation calendar and flexible hAbil
27	26	User Story 02	No	Display vacation/holiday calendar	1	1	1.00	62.00	63.00	16	[3,2]	As an employee, I would like to view my current vacation and flexible holiday sched Who
28	27	User Story 09	No	List all paystubs available	2	2	1.00	63.00	65.00	32	[3,2]	As an employee, I would like to view all available paystubs so that I can view any on List
29	28	User Story 14	No	Submit education request	3	3	1.00	65.00	68.00	64	[3,2]	As an employee, I would like to submit a request for an educational investment to n Pre-
30	29	User Story 20	No	Set up Health Savings Acct	3	3	1.00	68.00	71.00	128	[3,2]	As an employee, I would like to option to set up my Health Savings Account via the eSing
31	30	User Story 26	No	Export to Payroll service	8	8	1.00	71.00	79.00	240	[3,2]	As an admin, I would like to enroll export updates to employee profile information Exp
32	31	User Story 40	No	Links to Outside Investments	2	1	0.50	79.00	81.00	16	[3,2]	As an employee, I would like the ability to link to investments outside my company As a
33	32	User Story 39	No	Separate Pop-Up Windows	3	2	0.67	81.00	84.00	32	[4,2]	As a UI designer, I would like to standardize all pop-up windows App
34	33	User Story 18	No	Enroll for Company Provided Tutorials	3	2	0.67	84.00	87.00	128	[4,2]	As an employee, I would like to enroll in courses and tutorials that are offered throu Pre-
35	34	User Story 27	No	Import from payroll service	8	5	0.63	87.00	95.00	192	[4,2]	As an HR admin, I would like the ability to import the latest payroll run for an emplo Onl
36	35	User Story 21	No	Add/change dependents	5	2	0.40	95.00	100.00	160	[4,2]	As an employee, I would like the ability to add or remove dependents. Abil
37	36	User Story 30	No	Shop for company logo items	8	2	0.25	100.00	108.00	480	[4,2]	As the Head of HR, I would like to offer a number of company logo items for purchas Adn
38	37	User Story 19	No	Payroll admin entry/update	3	1	0.33	108.00	111.00	128	[5,3]	As an HR admin, I would like the ability to manage the payroll administration and co Onl
39	38	User Story 29	No	Update Employee Stock Purchase options	13	3	0.23	111.00	124.00	480	[5,3]	Display and provide ability to edit/change contribution to employee stock purchase Enti-
40	39	User Story 31	No	Wellness program	13	2	0.15	124.00	137.00	720	[5,3]	As a HR leader, I would like to have the wellness program information available and Pro-
41	40	User Story 25	No	Community volunteer options	5	1	0.20	137.00	142.00	160	[6,3]	As an employee, I would like to option to view, research and sign up for community A co
42	41	User Story 32	No	Quicken download	21	1	0.05	142.00	163.00	720	[6,3]	As an HR admin, I would like the ability to download journal entries from Quicken. Onl
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### **Product Backlog Details:**

#### Created Columns:

- <u>User Stories/Tasks Priority</u>: Ranks the user stories in terms of priority and the order in which they will be performed.
- o <u>User Stories/Tasks ID</u>: Unique identification label of each user story.
- Business Value Per Story Point: The total business value derived for each unit of story point within a user story, (Business Value / Story Point).
- Story Points Current Completion: The amount of story points earned when starting the current user story.
- Story Points Running Total: The amount of story points that will be earned upon the completion of the current user story.
- [Sprint, Release] Number: Reveals the current sprint and release details for a user story. For example, [2,1] means that the user story is part of sprint 2 under release 1.

### • Planning:

- Red Lines: Denotes the completion of a sprint.
- <u>Tasks Highlighting</u>: The set of tasks highlighted represent a release. Each release is highlighted with a different color.
- <u>Estimation Metric</u>: Story Points is the metric used for release planning and sprint mapping based on the provided average velocity.
- Release Cadence: The chosen pattern was a release per 2 sprints.
   Essentially, every release should contain approximately 60 story points worth of work.
- PBI Prioritization: Aspects such as user story dependencies, functionality groupings, and product economics should be taken into account in conjunction with the prioritization rules provided in the upcoming sections when prioritizing the PBIs.

## Part 3 - Release Plan

The provided assumptions are that of 30 story points per sprint and a total of four 2-week sprints. Based on this assumption and our chosen release cadence of 2 sprints per release, the amount of releases that can be formed are 2 which will occupy those 4 sprints. For the remaining backlog items that will not fit into the 4 sprints, they are given placeholders within the sprint mapping and release planning process. As time progresses and these stories become more fully developed, they will be slotted into the appropriate sprint and release iteration. For the time being, these additional PBIs are allocated to sprints 5 and 6 and grouped into release 3. The first sprint will begin on 12/01/2021 and the project will be underway. The product system will be referred to as EBP, which stands for Employee Benefits Portal.

### **Release Plan Important Dates:**

- EBP V1.0 MVP: Release Date of 12/28/2021
  - Sprint 1: 26 Story Points & Sprint 2: 27 Story Points
- EBP V1.1: Release Date of 01/25/2022
  - Sprint 3: 28 Story Points & Sprint 4: 27 Story Points
- EBP V1.2: Release Date of 02/22/2022
  - o Sprint 5: 29 Story Points & Sprint 6: 26 Story Points

#### **Release Plan Details:**

Overall, 3 releases have been planned. In the upcoming pages, a detailed product roadmap/release plan is provided.

# **EBP V1.0**

## 12/01/2021 - 12/28/2021

# **Sprint 1**

12/01/2021 - 12/14/2021

Story ID 05

Story ID 06

Story ID 36

Story ID 03

Story ID 15

Story ID 34

Story ID 17

Story ID 12

Story ID 33

Story ID 08

Story ID 37

Story ID 38

Story ID 16

# **Sprint 2**

12/15/2021 - 12/28/2021

Story ID 22

Story ID 23

Story ID 10

Story ID 24

**MVP Complete** Story ID 28

Story ID 41

Story ID 07

# **EBP V1.1**

## 12/29/2021 - 01/25/2022

## **Sprint 3**

## 12/29/2021 - 01/11/2022

Story ID 35

Story ID 11

Story ID 04

Story ID 13

Story ID 01

Story ID 02

Story ID 09

Story ID 14

Story ID 20

Story ID 26

Story ID 40

# Sprint 4

## 01/12/2022 - 01/25/2022

Story ID 39

Story ID 18

Story ID 27

Story ID 21

Story ID 30

# EBP V1.2 01/26/2022 - 02/22/2022

# Sprint 5

01/26/2022 - 02/08/2022

Story ID 19

Story ID 29

Story ID 31

## Part 4 - Grooming the Product Backlog

### Question 1:

The primary consideration emphasized when grooming the product backlog is such that the most valuable functionality and features are delivered first. In addition, it is important that each sprint delivers a slice of product functionality which provides the desired business value. The product backlog is dynamic and will evolve as the project progresses. The DEEP ideology will be used as a guideline to assess the characteristics of the backlog such that items are Detailed appropriately, Emergent, Estimated, and Prioritized. The approach used to groom the product backlog was based on the following rules:

### 1) MRFs

Initially, the first layer of prioritization for the provided backlog was based on the MVP categorization. All the MRFs necessary to produce the MVP were given higher priority such that the first release offers users a reasonably functioning product.

### 2) Business Value Per Story Point

Then, the PBIs were sorted based on their Business Value Per Story Point metric. PBIs with higher values were prioritized accordingly such that they are worked on first. Thus, the most valuable output possible is delivered each iteration.

### 3) Total Hours

Moving on, the PBIs were sorted based on the Total Hours metric. If two PBIs have the same Business Value Per Story Point but if one of them requires less hours, then that PBI is given a higher priority than the one with the larger time unit.

### 4) Situational Factors

Lastly, manual rearrangements need to be performed based on the situational factors of the project given constraints or considerations. Essentially, this process is discretionary in which items can be reordered because a particular story needs to be completed within a sprint or a set of stories need to be completed sequentially or it would be better to complete a high risk story before a high business value story. Overall, the product owner moves around a set of stories based on the situational factors when appropriate for the benefit of the project. In this instance, the order for certain elements don't necessarily follow the outlined rules above in a sequential manner. With regards to the project, the only manual rearrangement performed was moving the sequence of 2 user stories, such that the desired capacity is met for that particular sprint.

### Question 2:

	В	C	D	F	G	Н		J	K	L	M
ser Stories/Tasks	User Stories/Tasks	Required for		(1,2,3,5,8,13,2	Business Value Points	Business Value	Story Points Current	Story Points		[Sprint, Release]	
Priority	ID	MVP	Name	1)	(1,2,3,5,8)	Per Story Point	Completion	Running Total		Number	Narrative Description
1	User Story 05	Yes	Change payroll Deductions	1	8	8.00	0.00	1.00	128	[1,1]	As an employee I want the ability to display and edit payroll deductions.
2	User Story 06	Yes	Ability to Display Pre-tax Deductions	1	5	5.00	1.00	2.00	96	[1,1]	As an employee, I would like to view my pre-tax deductions
3	User Story 36	Yes	Employee Validation Rules	1	3	3.00	2.00	3.00	16	[1,1]	As an HR admin, I would like the ability to add employee validation rules
4	User Story 03	Yes	Change W-4 Info	1	3	3.00	3.00	4.00	144	[1,1]	As an employee, I would like the ability to change my W4 information, so that I car
5	User Story 15	Yes	Enter expenses	3	8	2.67	4.00	7.00	64	[1,1]	As an employee, I would like to enter and submit travel and other valid expenses.
6	User Story 34	Yes	Allowance for W-2 Hourly Employees	3	8	2.67	7.00	10.00	64	[1,1]	As an HR admin, I would like the ability to add allowance for W-2 hourly employee
7	User Story 17	Yes	Annual enrollment of benefits	3	8	2.67	10.00	13.00	120	[1,1]	As a HR Administrator, I want the ability to provide annual enrollment of benefits
8	User Story 12	Yes	Submit Reimbursable medical expenses	2	5	2.50	13.00	15.00	48	[1,1]	As an employee, I would like to have the ability to enter and requestreimbursable
9	User Story 33	Yes	SOX Audit Compliance Reporting	2	5	2.50	15.00	17.00	48	[1,1]	As an HR admin, I would like the ability to query and generate audit reports for SO
10	User Story 08	Yes	Ability to Print a Pay-stub Form	2	5	2.50	17.00	19.00	144	[1,1]	As an employee, I would like to ability to print my pay-stub from any pay period.
11	User Story 37	Yes	Charitable Contribution Tax Savings	1	2	2.00	19.00	20.00	16	[1,1]	As an employee, I would like to understand how much tax savings were generated
12	User Story 38	Yes	Notification of Changes to Deductions	3	5	1.67	20.00	23.00	32	[1,1]	As an employee, I would like the ability to be notified of any changes to my payro
13	User Story 16	Yes	Life Insurance enrollment	3	5	1.67	23.00	26.00	120	([1,1]	As an employee, I would like to enroll for life insurance for myself and my family
14	User Story 22	Yes	View Employee Stock Purchase Program information	5	8	1.60	26.00	31.00	160	[2,1]	As an employee, I would like to view the employee stock purchase information ar
15	User Story 23	Yes	Print W-2	5	8	1.60	31.00	36.00	160	[2,1]	As an employee, the information on your W-2 is extremely important when prepa
16	User Story 10	Yes	Calc 401k tax savings	2	3	1.50	36.00	38.00	192	[2,1]	As an employee, I want to calculate my 401k tax savings. Would be nice to have th
17	User Story 24	Yes	Charitable contribution edit	5	3	0.60	38.00	43.00	160	[2,1]	As an employee, I would like to view, select and elect to contribute charitable do
18	User Story 28	Yes	Update personal profile info	8	3	0.38	43.00	51.00	240	[2,1]	As an employee, I want to the option to update my profile information so that it n
19	User Story 41	No	Links to Outside Charitable Contributions	1	8	8.00	51.00	52.00	16	[2,1]	As an employee, I would like the ability to register my charitable organization for
20	User Story 07	No	Ability to View Pay-stub from any Pay Period	1	3	3.00	52.00	53.00	128	[2,1]	As an employee, I would like to view my paystubs for any period during the last 2
21	User Story 35	No	Usability for Employee Experience	3	R	2,67	53.00	56.00	64	[3,2]	As an employee, I would like the ability to use the portal on a number of devices.
22	User Story 11	No	Request planned vacation	2	5	2.50	56.00	58.00	48	[3,2]	As an employee, I would like to submit a request for vacation to my manager. The
23	User Story 04	No	Change Investment Options	1	2	2.00	58.00	59.00	16	[3,2]	As an employee, I want the ability to display and edit retirement account investm
24	User Story 13	No	Set up automatic deposit	2	3	1.50	59.00	61.00	48	10.07.03.00	As an employee, I would like to ability to set up automatic deposits for payroll and
A	В	С	D	F	G	Н	1	J	K	L	M
25	User Story 01		Maintain vacation/holiday calendar	1	1	1.00	61.00	62.00	16	[3,2]	As an employee, I can create, update and delete my vacation calendar and flexible
	User Story 02	No	Display vacation/holiday calendar	1	1	1.00					As an employee, I would like to view my current vacation and flexible holiday sch
26						4	62.00	63.00	16	[3,2]	
27	User Story 09	No	List all paystubs available	2	2	1.00	63.00	65.00	32	[3,2]	
27 28	User Story 14	No	Submit education request	3	3	1.00	63.00 65.00	65.00 68.00	32 64	[3,2]	As an employee, I would like to submit a request for an educational investment t
27	User Story 14 User Story 20		Submit education request Set up Health Savings Acct			1.00 1.00 1.00	63.00	65.00	32 64 128	[3,2]	As an employee, I would like to submit a request for an educational investment t
27 28 29 30	User Story 14	No	Submit education request	3 3 8	3	1.00 1.00 1.00 1.00	63.00 65.00	65.00 68.00	32 64 128 240	[3,2]	As an employee, I would like to submit a request for an educational investment t As an employee, I would like to option to set up my Health Savings Account via th
27 28 29	User Story 14 User Story 20	No No	Submit education request Set up Health Savings Acct	3	3	1.00 1.00 1.00	63.00 65.00 68.00	65.00 68.00 71.00	32 64 128 240 16	[3,2] [3,2] [3,2]	As an employee, I would like to submit a request for an educational investment t As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee profile information
27 28 29 30	User Story 14 User Story 20 User Story 26	No No No	Submit education request Set up Health Savings Acct Export to Payroll service	3 3 8	3 3 8	1.00 1.00 1.00 1.00	63.00 65.00 68.00 71.00	65.00 68.00 71.00 79.00	32 64 128 240	[3,2] [3,2] [3,2] [3,2]	As an employee, I would like to submit a request for an educational investment t As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee profile information
27 28 29 30 31	User Story 14 User Story 20 User Story 26 User Story 40	No No No	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments	3 3 8 2	3 3 8 1	1.00 1.00 1.00 1.00 0.50	63.00 65.00 68.00 71.00 79.00	65.00 68.00 71.00 79.00 81.00	32 64 128 240 16	[3,2] [3,2] [3,2] [3,2] [3,2]	As an employee, I would like to submit a request for an educational investment that an employee, I would like to option to set up my Health Savings Account via the As an admin, I would like to enroll export updates to employee profile informatic As an employee, I would like the ability to link to investments outside my comparts and U designer, I would like to standardize all pop-up windows
27 28 29 30 31 32	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39	No No No No	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments Separate Pop-Up Windows	3 3 8 2	3 3 8 1	1.00 1.00 1.00 1.00 0.50 0.67	63.00 65.00 68.00 71.00 79.00 81.00	65.00 68.00 71.00 79.00 81.00	32 64 128 240 16 32	[3,2] [3,2] [3,2] [3,2] [3,2] [4,2]	As an employee, I would like to submit a request for an educational investment to As an employee, I would like to option to set up my Health Savings. Account via the As an admin, I would like to enroll export updates to employee profile information As an employee, I would like the ability to link to investments outside my compa As a UI designer, I would like to standardize all pop-up windows As an employee, I would like to enroll in courses and tutorials that are offered the
27 28 29 30 31 32 33	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39 User Story 18	No No No No No	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments Separate Pop-Up Windows Erroll for Company Provided Tutorials	3 3 8 2	3 3 8 1 2	1.00 1.00 1.00 1.00 0.50 0.67	63.00 65.00 68.00 71.00 79.00 81.00	65.00 68.00 71.00 79.00 81.00 84.00	32 64 128 240 16 32 128	[3,2] [3,2] [3,2] [3,2] [3,2] [4,2] [4,2]	As an employee, I would like to view all available paystubs so that I can view any As an employee, I would like to submit a request for an educational investment I As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee profile informatic As an employee, I would like the ability to link to investments outside my compa As a Ul designer, I would like to strandardize all pop-up windows As an employee, I would like to enroll in courses and tutorials that are offered the As an HR admin, I would like the ability to import the latest payroll run for an emp As an employee, I would like the ability to import the latest payroll run for an emp As an employee, I would like the ability to add or remove dependents.
27 28 29 30 31 32 33 34	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39 User Story 18 User Story 27	No No No No No No	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments Separate Pop-Up Windows Enroll for Company Provided Tutorials Import from payroll service	3 3 8 2 3 3	3 3 8 1 2 2 5	1.00 1.00 1.00 1.00 0.50 0.67 0.67	63.00 65.00 68.00 71.00 79.00 81.00 84.00	65.00 68.00 71.00 79.00 81.00 84.00 87.00	32 64 128 240 16 32 128 192	[3,2] [3,2] [3,2] [3,2] [4,2] [4,2] [4,2]	As an employee, I would like to submit a request for an educational investment to As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee profile information As an employee, I would like the ability to link to investments outside my compa As a UI designer, I would like to standardize all pop-up windows As an employee, I would like to standardize all pop-up windows As an employee, I would like the ability to import the latest payroll run for an employee, I would like the ability to import the latest payroll run for an employee, I would like the ability to import the latest payroll run for an employee, I would like the ability to add or remove dependents.
27 28 29 30 31 32 33 34 35	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39 User Story 18 User Story 27 User Story 21	No	Submit education request Set up Health Savings Acct Export to Payroll service Uniks to Outside Investments Separate Pop-Up Windows Emoll for Company Provided Tutorials Import from payroll service Add/change dependents	3 3 8 2 3 3 3 8 5	3 3 8 1 2 2 2 5	1.00 1.00 1.00 1.00 0.50 0.67 0.67 0.63	63.00 65.00 68.00 71.00 79.00 81.00 84.00 87.00	65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00	32 64 128 240 16 32 128 192 160	[3,2] [3,2] [3,2] [3,2] [4,2] [4,2] [4,2]	As an employee, I would like to submit a request for an educational investment it As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee profile information As an employee, I would like the ability to link to investments outside my compa As a UI designer, I would like to standardize all pop-up windows As an employee, I would like to erroll in courses and tutorials that are offered the As an HR admin, I would like the ability to import the latest payroll run for an emp As an employee, I would like the ability to amport the latest payroll run for an emp As an employee, I would like the offer a number of company logo Items for purch
27 28 29 30 31 32 33 34 35 36	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39 User Story 18 User Story 27 User Story 21 User Story 30	No	Submit education request Set up Health Savings Acct Export to Payroll service Uniks to Outside investments Separate Pop-Up Windows Emoil for Company Provided Tutorials Import from payroll service Add/change dependents Shop for company logo items	3 3 8 2 3 3 3 8 5	3 3 8 1 2 2 2 5	1.00 1.00 1.00 1.00 0.50 0.67 0.67 0.63 0.40	63.00 65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00	65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00 100.00	32 64 128 240 16 32 128 192 160 480	[3,2] [3,2] [3,2] [3,2] [4,2] [4,2] [4,2] [4,2]	As an employee, I would like to submit a request for an educational investment to As an employee, I would like to option to set up my Health Savings Account via th As an admin, I would like to enroll export updates to employee proflie information As an employee, I would like the ability to link to investments outside my compa As all designer, I would like to standardize all pop-up windows As an employee, I would like to enroll in courses and tutorials that are offered the As an HR admin, I would like the ability to import the latest payroll run for an emp
27 28 29 30 31 32 33 34 35 36	User Story 14 User Story 20 User Story 26 User Story 40 User Story 39 User Story 18 User Story 27 User Story 21 User Story 30 User Story 19	No N	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments Separate Pop-Up Windows Enroll for Company Provided Tutorials Import from payroll service Add/change dependents Shop for company logo items Payroll admin entry/update	3 3 8 2 3 3 8 5 8	3 3 8 1 2 2 2 5	1.00 1.00 1.00 1.00 0.50 0.67 0.67 0.63 0.40 0.25	63.00 65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00 100.00	65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00 100.00 111.00	32 64 128 240 16 32 128 192 160 480	[3,2] [3,2] [3,2] [3,2] [4,2] [4,2] [4,2] [4,2] [4,2] [4,2]	As an employee, I would like to submit a request for an educational investment it.  As an employee, I would like to option to set up my Health Savings. Account via th.  As an admin, I would like to enroll export updates to employee profile informatic  As an employee, I would like the ability to link to investments outside my compa.  As all designer, I would like to standardize all pop-up windows.  As an employee, I would like to enroll in courses and tutorials that are offered th.  As an HR admin, I would like the ability to import the latest payroll run for an employee, I would like the ability to manage the payroll go items for purch  As an HR admin, I would like the facility to manage the payroll administration and  Osplay and provide ability to edit/change contribution to employee stock purchar
27 28 29 30 31 32 33 34 35 36 37	User Story 14 User Story 20 User Story 26 User Story 39 User Story 18 User Story 18 User Story 27 User Story 27 User Story 21 User Story 21 User Story 21 User Story 21 User Story 29 User Story 29	No N	Submit education request Set up Health Savings Acct Export to Payroll service Unks to Outside Investments Separate Pop-Up Windows Enroll for Company Provided Tutorials Import from payroll service Add/change dependents Shop for company logo Items Payroll admin entry/update Update Employee Stock Purchase options	3 3 8 2 3 3 3 8 5 8	3 3 8 1 2 2 5 5 2 2 1 3	1.00 1.00 1.00 1.00 0.50 0.67 0.63 0.40 0.25 0.33 0.23	63.00 65.00 68.00 71.00 79.00 81.00 84.00 95.00 100.00 111.00	65.00 68.00 71.00 79.00 81.00 84.00 87.00 95.00 100.00 111.00 124.00	32 64 128 240 16 32 128 192 160 480 128 480	[3,2] [3,2] [3,2] [3,2] [4,2] [4,2] [4,2] [4,2] [4,2] [4,2] [5,3]	As an employee, I would like to submit a request for an educational investment it.  As an employee, I would like to option to set up my Health Savings. Account via it.  As an admin, I would like to enroll export updates to employee profile informatic.  As an employee, I would like the ability to link to investments outside my compa.  As a U designer, I would like to standardize all pop-up windows.  As an employee, I would like to enroll in courses and tutorials that are offered th.  As an HR admin, I would like the ability to import the latest payroll run for an emp.  As an employee, I would like the ability to move dependents.  As the Head of HR, I would like to offer a number of company logo items for purch as an HR admin, I would like the ability to manage the payroll administration and

### **Spring Planning & Mapping:**

The development team's capacity for each sprint is their average velocity of 30 points. In addition, a preferred buffer of 2 to 3 story points is desired taking into account the factor of uncertainty. The first release has a buffer of 4 given that it will be the first iteration. Thus, the aim of each sprint was to complete around 27 to 28 story points of work. The release cadence is that of 2 sprints per release. User stories with prioritization ranks of 37 - 41 have been temporarily planned based on the current available information. As Scrum leverages an appropriate combination of up-front and

just-in-time planning, the PBIs towards the bottom of the backlog will become more fully developed as the project proceeds forward. For now, they are given placeholders within the sprint mapping and release planning process.

### • Release 1 - EBP V1.0, MVP:

Sprint 1: Story IDs - 05, 06, 36, 03, 15, 34, 17, 12, 33, 08, 37, 38, 16

Sprint 2: Story IDs - 22, 23, 10, 24, 28, 41, 07

### • Release 2 - EBP V1.1:

Sprint 3: Story IDs - 35, 11, 04, 13, 01, 02, 09, 14, 20, 26, 40

Sprint 4: Story IDs - 39, 18, 27, 21, 30

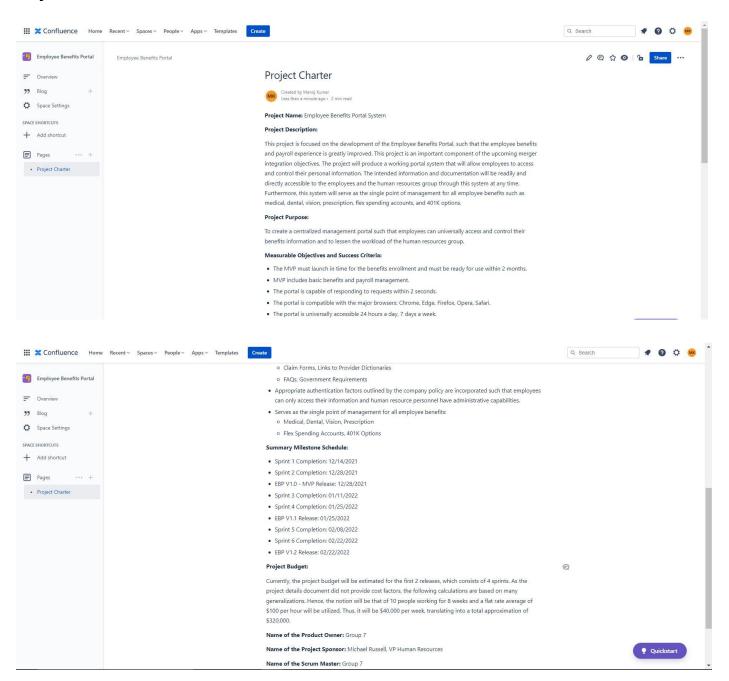
### • Release 3 - EBP V1.2:

Sprint 5: Story IDs - 19, 29, 31

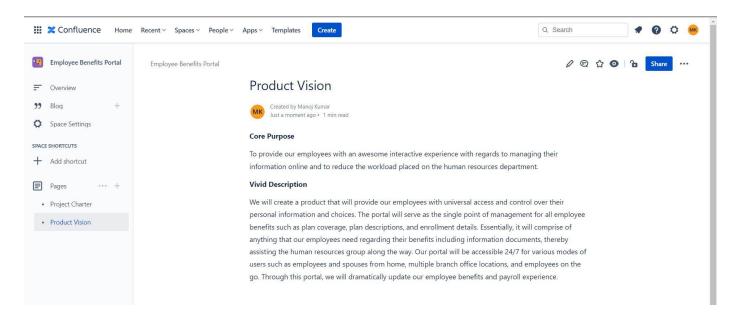
<u>Sprint 6</u>: Story IDs - 25, 32

## Part 5 - JIRA Software

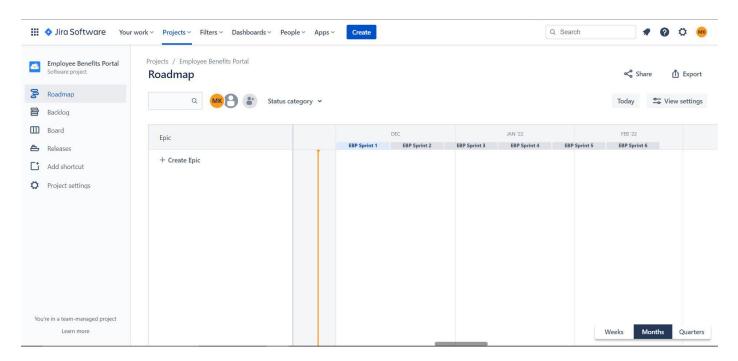
### **Project Charter:**



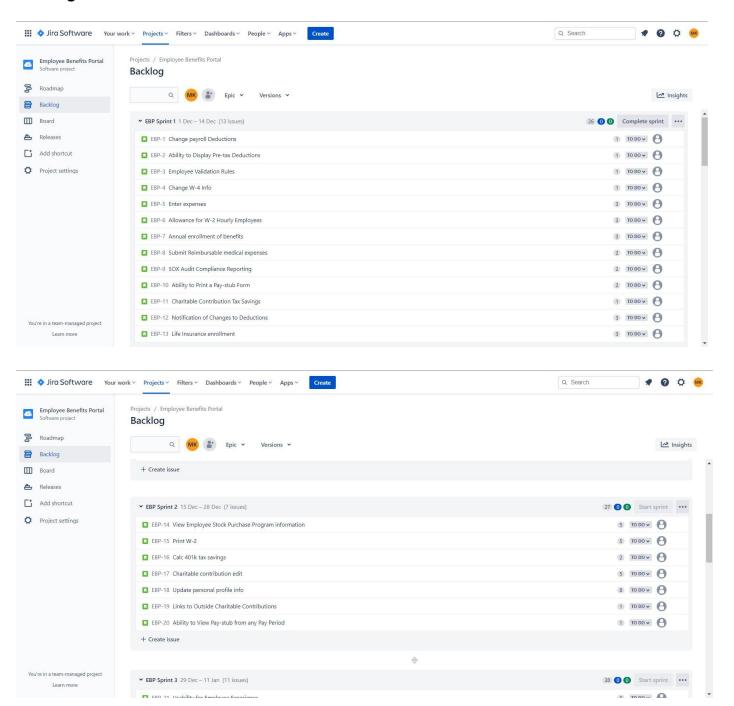
### **Product Vision:**

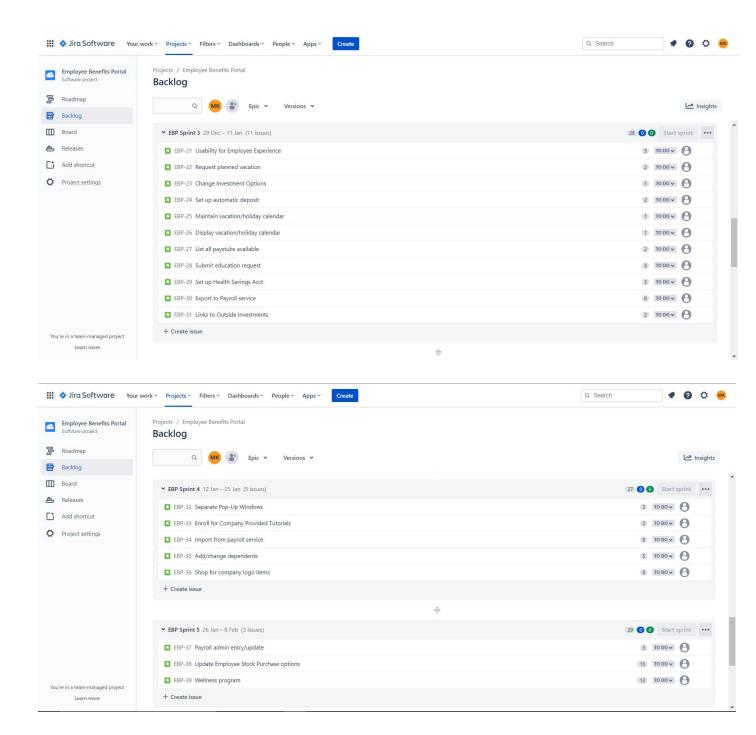


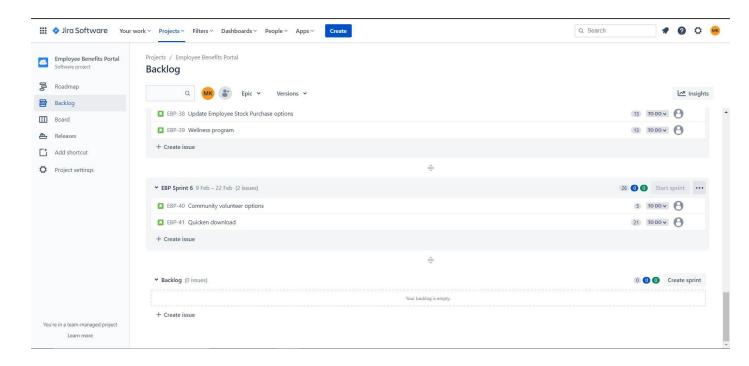
### Roadmap:



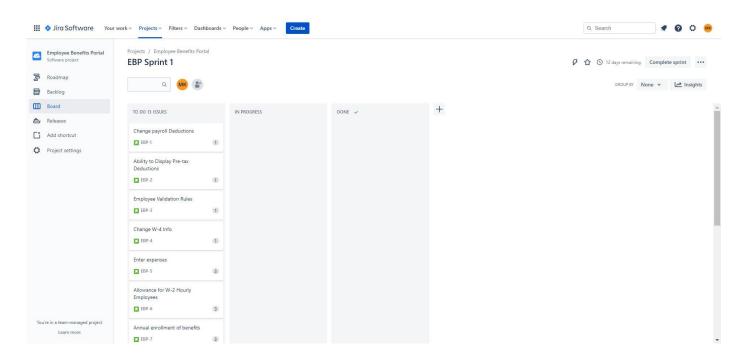
### Backlog:

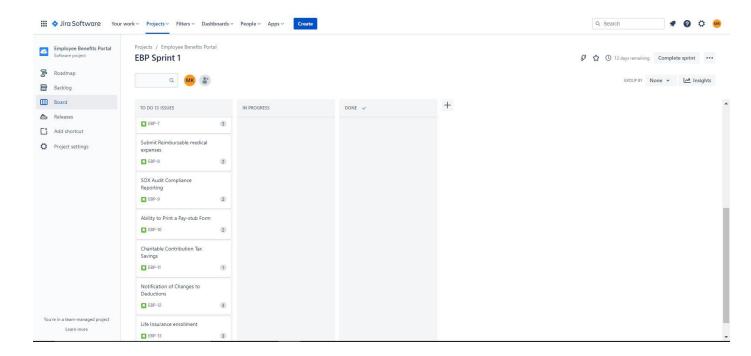






### **Board:**





### Releases:

