

# 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
- EBP V1.2 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.

A	B	C	D	F	G	H	I	J	K	L	M	
User Stories/Tasks Priority	User Stories/Tasks ID	Required for MVP	Name	Story Points (1,2,3,5,8,13,21)	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	Acc
1	2	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	1	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
4	3	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	Yes	Change W-4 Info	1	3	3.00	4.00	4.00	144	[1,1]	As an employee, I would like the ability to change my W4 information, so that I can Hav	Can
6	5	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.	Enti
7	6	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 employees	Allc
8	7	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 to t	to t
9	8	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 m	IA li
10	9	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 SOX	AB
11	10	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	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	Disc
13	12	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 payroll	Any
14	13	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	Pro
15	14	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 and	View
16	15	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 prepari	View
17	16	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	View
18	17	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 edit to contribute charitable dona	Abil
19	18	Yes	Update personal profile info	8	3	0.38	43.00	51.00	240	[2,1]	As an employee, I want to be the option to update my profile information so that it ref	Hav
20	19	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 au	Abil
21	20	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 ye	Abil
22	21	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	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 re	Abil
24	23	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 investmen	Con
25	24	No	Set up automatic deposit	2	3	1.50	59.00	61.00	48	[3,2]	As an employee, I would like to be able to set up automatic deposits for payroll and	Acc

	A	B	C	D	F	G	H	I	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 H	Abil
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	Wh
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 r	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	4 Sing
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	Adm
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	Ent
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 c
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:**

- User Stories/Tasks Priority: Ranks the user stories in terms of priority and the order in which they will be performed.
- User Stories/Tasks ID: 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.
- Tasks Highlighting: The set of tasks highlighted represent a release. Each release is highlighted with a different color.
- Estimation Metric: 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
  - 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

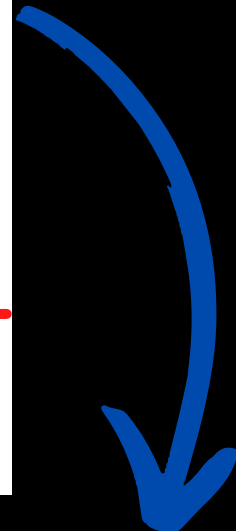
**MVP Complete**

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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:

	A	B	C	D	F	G	H	I	J	K	L	M	
	User Stories/Tasks Priority	User Stories/Tasks ID	Required for MVP	Name	Story Points (1,2,3,5,8,13,21)	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	Acco
1													
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	An t
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 employees	Allic
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 to 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 request reimbursable 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 SOX. 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.	Pror
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 t Dis	
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 payroll. 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 m 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 and 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 prepari 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 dona 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 ref Hav	
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 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 ye 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. Al 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 re Abil	
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 investmen 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 n Acco	
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 H Abil	
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 Wh	
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	
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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 Sing	
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 purcha Ade	
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 Ent	
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 c	
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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## 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

Sprint 6: Story IDs - 25, 32

# Part 5 - JIRA Software

## Project Charter:

**Employee Benefits Portal**

Employee Benefits Portal

### Project Charter

Created by Manoj Kumar  
Less than a minute ago • 2 min read

**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.

**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
- EBP V1.2 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

**Quickstart**





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EBP Sprint 1 1 Dec - 14 Dec (13 issues) 26 0 0 Complete sprint

EBP-1 Change payroll Deductions 1 TO DO

EBP-2 Ability to Display Pre-tax Deductions 1 TO DO

EBP-3 Employee Validation Rules 1 TO DO

EBP-4 Change W-4 Info 1 TO DO

EBP-5 Enter expenses 3 TO DO

EBP-6 Allowance for W-2 Hourly Employees 3 TO DO

EBP-7 Annual enrollment of benefits 3 TO DO

EBP-8 Submit Reimbursable medical expenses 2 TO DO

EBP-9 SOX Audit Compliance Reporting 2 TO DO

EBP-10 Ability to Print a Pay-stub Form 2 TO DO

EBP-11 Charitable Contribution Tax Savings 1 TO DO

EBP-12 Notification of Changes to Deductions 3 TO DO

EBP-13 Life Insurance enrollment 3 TO DO

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EBP Sprint 2 15 Dec - 28 Dec (7 issues) 27 0 0 Start sprint

EBP-14 View Employee Stock Purchase Program information 5 TO DO

EBP-15 Print W-2 5 TO DO

EBP-16 Calc 401k tax savings 2 TO DO

EBP-17 Charitable contribution edit 5 TO DO

EBP-18 Update personal profile info 8 TO DO

EBP-19 Links to Outside Charitable Contributions 1 TO DO

EBP-20 Ability to View Pay-stub from any Pay Period 1 TO DO

+ Create issue

EBP Sprint 3 29 Dec - 11 Jan (11 issues) 28 0 0 Start sprint

EBP-21 Holiday for Employee Expenses 3 TO DO

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EBP Sprint 3 29 Dec – 11 Jan (11 issues)

28 0 0 Start sprint ⋮

EBP-21 Usability for Employee Experience3 TO DO 👤

EBP-22 Request planned vacation2 TO DO 👤

EBP-23 Change Investment Options1 TO DO 👤

EBP-24 Set up automatic deposit2 TO DO 👤

EBP-25 Maintain vacation/holiday calendar1 TO DO 👤

EBP-26 Display vacation/holiday calendar1 TO DO 👤

EBP-27 List all paystubs available2 TO DO 👤

EBP-28 Submit education request3 TO DO 👤

EBP-29 Set up Health Savings Acct.3 TO DO 👤

EBP-30 Export to Payroll service8 TO DO 👤

EBP-31 Links to Outside Investments2 TO DO 👤

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EBP Sprint 4 12 Jan – 25 Jan (5 issues)

27 0 0 Start sprint ⋮

EBP-32 Separate Pop-Up Windows3 TO DO 👤

EBP-33 Enroll for Company Provided Tutorials3 TO DO 👤

EBP-34 Import from payroll service8 TO DO 👤

EBP-35 Add/change dependents5 TO DO 👤

EBP-36 Shop for company logo items8 TO DO 👤

+ Create issue

EBP Sprint 5 26 Jan – 8 Feb (3 issues)

29 0 0 Start sprint ⋮

EBP-37 Payroll admin entry/update3 TO DO 👤

EBP-38 Update Employee Stock Purchase options13 TO DO 👤

EBP-39 Wellness program13 TO DO 👤

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EBP-38 Update Employee Stock Purchase options

13

TO DO

EBP-39 Wellness program

13

TO DO

+ Create issue

EBP Sprint 6 9 Feb – 22 Feb (2 issues)

2600Start sprint

EBP-40 Community volunteer options

5

TO DO

EBP-41 Quicken download

21

TO DO

+ Create issue

Backlog (0 issues)

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12 days remaining

Complete sprint

GROUP BYNoneInsights

TO DO 13 ISSUES

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EBP-1

1

Ability to Display Pre-tax Deductions

EBP-2

1

Employee Validation Rules

EBP-3

1

Change W-4 Info

EBP-4

1

Enter expenses

EBP-5

3

Allowance for W-2 Hourly Employees

EBP-6

3

Annual enrollment of benefits

EBP-7

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12 days remaining

Complete sprint

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Submit Reimbursable medical expenses

EBP-8

SOX Audit Compliance Reporting

EBP-9

Ability to Print a Pay-stub Form

EBP-10

Charitable Contribution Tax Savings

EBP-11

Notification of Changes to Deductions

EBP-12

Life Insurance enrollment

EBP-13

IN PROGRESS

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Version	Status	Progress	Start date	Release date	Description
EBP V1.2	UNRELEASED	No issues	Jan 26, 2022	Feb 22, 2022	...
EBP V1.1	UNRELEASED	No issues	Dec 29, 2021	Jan 25, 2022	...
EBP V1.0 - MVP	UNRELEASED	No issues	Dec 01, 2021	Dec 28, 2021	...