

Client Project Delivery 2 – Interim Status Report Evaluation

Client & Project:

Team:

Development Progress & Planning Grade: ____ Report Quality & Progress on Final Documents Grade: ____ Client Interaction : ____

	Excerpt from Instructions for Interim Status Report	System Development Progress & Planning	Report Quality & Progress on Final Documents	Client Interaction
Working Software	Must have working software available for your Config/Code Checkpoint with the TA. (See schedule and above due dates.) For initial user stories: Code/Config should be completed and integrated as needed. Team testing and user testing is completed. Initial user stories have been deployed. Your cover sheet must include information about how to access your software for review by your professor.	Progress (quality & quantity):	Quality (matches standards):	Have you seen updated versions of your system since the Sprint Kickoff?
Test Data	Test data should be created for all completed and in-progress user stories that can be used by the team and users during testing.			
Production Database	If applicable, the database Installation Plan should explain how this <i>will be</i> created and tested OR a footnote about how it <i>was</i> created and tested.			What is your opinion of the work done?
Production Environment	Your production environment should be in use or well tested with some portion of the software.			Do you have access to use or update the system yet?
Introductory Pages				
Cover Sheet	Your cover sheet should list: (1) title of deliverable "[Client Name] Interim Status Report", (2) team name, (3) names of team members, and (4) access information to allow evaluation of your software progress.	Access instructions good for review:	Clarity & completeness:	How often have you seen the team members since the Sprint Kickoff?
TOC			Complete & easy to follow format:	What do you think of the team's overall progress?
Executive Summary	A 1-2 page letter to your client(s) that summarizes the status of your project (i.e. ahead or behind schedule – be specific), plans for completion, risks, sections in this delivery, and likelihood of meeting all project objectives (cc your professor). NOTE: This is not persuasive. Be transparent about good and bad.		Quality of summary: Consistency with rest of report:	Are you communicating only in meetings or frequently outside of meetings? If so, how do you communicate?
Professors' Eyes Only and/or Future MIS 374 Teams Only	Optional. This optional page informs your professor of any issues that they should be aware of that have caused project risk, e.g. internal political issues or difficult client situations. <i>Under no circumstances</i> should this section be included in documents submitted to the client.	Relevance for client situation		Has the team been diligent about revisiting priorities and focusing on value for you?

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Updated Budget	Improve the Budget from your Project Charter to reflect current facts.	Level of detail appropriate for this stage of development?	Are assumptions annotated?	Has client seen and approved proposed budget? Is budget clear to client?
Updated high-level Gantt Chart	Provide a high-level Gantt like in your charter, but notate where changes have occurred (e.g. new user stories added, user stories cut from scope, updates to expected start and end dates of user stories, changes to order of user stories). Included both the original timeline and the newest timelines with a short paragraph on the updates that were made and reasons for the changes if many changes were made. Also note the status of each user story (Not Started, In Progress, In Review, Completed). For stories marked "in progress," show percent complete.	Updated progress shown?	Clarity Good use of simultaneous work at user story level	Client understands progress? Has sprint schedule been consistent or unpredictable? Are you informed at least weekly on what is accomplished, in progress, and planned?
Trello Board	Trello Board reflects current scope and status of the project. Follow a work breakdown structure for each user story using Trello. Assign team members and estimate completion dates for each card. Ensure you are testing throughout each sprint. Was the Trello board continuously used to track progress or were changes all made recently?	Work structure intuitive (i.e. user stories in progress have cards at feature level with ADC checklists for tasks within each card)? Indicates completed work? -5 if no work shown as done (-2 or -3 if partial) Indicates in progress user stories/tasks? Clear individual tasks (not too many team tasks) -2 to -5 too many "team" tasks All cards in progress (or review or deployed) include sign off check box for client	Indicates user stories/tasks that have not been started? Indicates user stories/tasks that have exceeded their original deadlines (i.e. that are late)? Are clients actively approving and reviewing cards in Trello? Is one user or are all users involved in managing work in Trello board? Are tasks updated regularly or just before milestones?	Do all team members participate equally? Are you actively using Trello to approve work and monitor progress?

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Appendices	As needed; must include client meeting agendas (that include progressive status reports) since Project Charter. Agendas must also be saved on Box and sent to client ahead of meetings. If dates are missed, note why. Make sure no bullets disappear on future agendas without explanation. Be sure each agenda starts on a new page (include page breaks).	Shows progress on Trello tasks? At least weekly client meetings?	Agenda Template used? Tasks progress meeting to meeting?	Have the meetings been productive? Has the team been open about issues related to the project's scope, budget, and schedule?
Client signoff of work	Has there been clear proof of signoff of work provided on Trello?	Client signed off on features in Trello?		
User/System Admin Materials		Report Quality &	Progress on Final Documents	
User Materials TOC	Title of project and list of contents for this section—this list will be a list of the user materials created for all completed and in-progress user stories.	Team's understanding of users matches client understanding:	Completeness of list of contents: Creativity for situation:	Have the teams discuss what kind of user guides and training you would like to have?
User materials > manual? > QRG? > on-line help? > video?	Chosen materials must be agreed to with the team AND client <i>before</i> this Interim Status Report. Include a completed draft of all types of user materials for all completed and in-progress sprints.	Effective use of graphics (visual aids) in user materials: Materials support system functionality to date (completeness)?	Profs' perception of quality: Profs' perception of progress to date:	How do rate the quality of the user guides?
System Admin Materials TOC	Title of project and list of contents for this section—this list will be a list of the system admin materials created for all completed and in-progress user stories.	Team's understanding of system admins matches client understanding:	Completeness of list of contents: Creativity for situation:	Have the teams discuss what kind of system admin guides and training you would like to have?
System Admin materials > manual? > QRG? > on-line help? > video?	Chosen materials must be agreed to with the team AND client <i>before</i> this Interim Status Report. Include a completed draft of all types of system admin materials for all completed and in-progress sprints. System administrators perform operational steps to support the system (e.g. archiving, user administration, software updates)	Profs' perception of quality of QRGs: QRG support system functionality to date (completeness)?	Profs' perception of progress to date:	Perception of Quality:
Training materials	Include final training materials for completed sprints. At a minimum you must have an outline for training plans for relevant user roles (e.g. admins, user, developers).	Profs' perception of quality of training: Training materials/plan support system functionality to date (completeness)?	Profs' perception of progress to date:	How do rate the quality of the training? Has a training occurred yet?

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Developers' Materials		System Development Progress & Planning	Report Quality & Progress on Final Documents	Client Interaction
Developer Materials TOC	Title of project and list of contents for this section—this list will be a list of the developer materials created for all completed and in-progress user stories..	Team's understanding of future developers matches client understanding:	Completeness of materials:	Did team work with you or appropriate person to determine the detail and format of a developer guide?
Developer materials	Inclusions in this section support maintenance and enhancements. Likely inclusions are: > To-Be Concept or Arch diagrams (with updates since charter) > Web Flow Diagram (if applicable) > ERD (if applicable) > Config or Coding & I/O standards > Details about the sandbox and production environment & other production issues > Passwords and login information to all systems	Effective use of graphics (visual aids) in developer materials (e.g. ERD): Materials support system functionality to date (completeness)?	Profs' perception of quality: Profs' perception of progress to date:	Have you seen the Developer Guide yet and did the team explain it to you? How would you rate the quality of the Developer Guide?
Installation Guide	Completed version of how system was initially set up and installed at sprint kickoff. An early draft of steps required of the final system "Go Live". This might include removing test data as well as issues with changing from the sandbox environment to the production, <i>Go Live</i> environment. Steps should be <u>detailed</u> and <u>repeatable</u> . Someone without knowledge of your system should be able to follow the steps and correctly set up your system without asking you questions. For systems with custom code, you must include very detailed steps on how to access/change/deploy code.	Profs' perception of quality of installation plan: Profs' perception of quality of "go live" plan:	Profs' perception of progress to date: Profs' perception of detail:	Perception of Quality:

Test Materials				
Test Plan/Update	Summarize your approach to test the system along with statistics on testing progress up to this point. Include percentages and specifics on issues found and resolutions. This should include a summary of the functions tested and those <i>still to be</i> tested. NOTE: This is not persuasive. Facts and transparency! Talk about % of testing complete and incomplete as well as bugs found.	Profs' perception of quality of test plan (approach overall):	Clarity of plan	Are you in the loop on the team's progress of system testing?
Test Specifications	Testing will be on-going at this point, but for completed sprints, you should have documented results of team and user testing. To be thorough, be sure you create both positive and negative test cases for your user story features. Tests should be stored in your team test tracker on Box. We should see test execution progress (Pass, Fail) in tracker for completed sprints including screenshots of executed tests on Box. Do not print your tracker or testing documentation as part of this deliverable – professors will look on Box.	Profs' perception of progress to date on testing details: Tracker updated during each sprint? Multiple people involved in testing? Details sufficient for test steps?	Clarity of details Documentation for test pass/fail on Box? Positive and negative tests for user story features?	Have you had the opportunity to do your own User Testing? If not, when will this happen?
	Were test cases created and run over last few weeks or just added week before D2?			Do you think the team will deliver a quality final product that you will use?