

Benefits and Administration Team (BAAT) Release Plan

Part 1 - Project Charter

1. Create a project charter based on information in the SimAgile Orientation guide and the Company Policies document on eLearning. Your project charter should include the following sections.

Project Name: Employee Payroll And Benefit Application (EPABA)

Project Description: To build a website that provides the employees of Uniworld all information regarding their payroll, benefits, and tax instantly, and which is accessible 24x7

Project Purpose: To release a unified platform to create a 24x7 mobile, centralized portal for the employees and HR department of Uniworld so that they can access, provide, and update information regarding their payroll, tax, and benefits through a single, secure portal

Measurable Objectives and Success Criteria:

To release an MVP product by the end of Sprint 4

1. To deliver the MVP version of the portal by the end of the 4th sprint
2. For the portal to be accessible 24x7, intuitive, and easy to use
3. The portal must be able to respond to requests within 2 seconds
4. Compatible with all major browsers
5. Ability to be accessed from work, home, or any other location
6. Portal needs to have complete information, including supporting documentation and FAQs regarding plan coverage, government requirements, plan descriptions, provider directories, etc., related to benefits for the employees and dependants (wherever applicable)

Summary Milestone Schedule: The Plan is to have 2 releases.

Release #	Sprint #	Start Date	End Date	Comment
Release 1	Sprint 1	12/05/2022	12/16/2022	This version will have all the MVP features. This will be released at the end of Sprint 2.
Release 1	Sprint 2	12/19/2022	12/30/2022	

Release 2	Sprint 3	01/02/2023	01/13/2023	This version will have all User stories except US-29,25,31,32 (As they are part of Backlog1 & Backlog2)
Release 2	Sprint 4	01/16/2023	01/27/2023	

Project Budget:

(Number of hours per sprint * pay per sprint) + Recreation budget =

Project Owner = $80 * 110 = 8,800$

Scrum Master = $80 * 80 = 6,400$

Dev Team (10) = $80 * 100 = 8,000 * 10 = 80,000$

Recreation budget = 5000

Project Budget for 4 sprints = \$385,800

Name of the Product Owner – Vaishnavi Arni

Name of the Project Sponsor – Michael Russel, VP Human Resources

Name of the Scrum Master – Zain Ul Abdeen

Part 2 - Product Vision

Vision: Build a unified, flexible, user-friendly and secure platform to manage employee payroll, benefits, and taxation creating exceptional experiences for platform users.

Part 3 - Release Plan

1. Analyze all of the user stories in the initial product backlog and create a product roadmap/release plan. The product roadmap should clearly identify the release date for the minimally viable product and the release date(s) of any subsequent versions. When developing your release plan, assume an average velocity of 30 story points per sprint and a total of four two-week sprints. How many release totals do you have planned?

We plan to have 2 Releases distributed under 4 Sprints having around 30 story point velocity each sprint.

Release #	Sprint #	Start Date	End Date	User Stories
Release 1	Sprint 1	12/05/2022	12/16/2022	US - 05,06,03,36,15,17,34,08,12,33,37, 16

Release 1	Sprint 2	12/19/2022	12/30/2022	US - 22,23,10,24,28,41,07
Release 2	Sprint 3	01/02/2023	01/13/2023	US - 35,11,04,13,01,02,26,18
Release 2	Sprint 4	01/16/2023	01/27/2023	US - 39,27,40,21,19,30

After distributing User Stories among 4 sprints there are remaining user stories which have been placed to be worked on post Release after Sprint 4 which are US - 29,25,31,32 to be part of Backlog1 & Backlog2.

2. List the date of each release and provide a short, descriptive name for each release.

Release 1: EPABA -1.0

Date of Release 1: 12/30/2022

This version will have all the MVP features. This will be released by the end of Sprint 2

Release 2: EPABA- 2.0

Date of Release 2: 01/27/2023

This version will contain all non-MVP user stories with a high business value per story point.

Part 4 - Grooming the Product Backlog (20 points)

1. Groom your entire product backlog and describe the approach you used to groom the product backlog. Specifically, list and describe the rules you used to prioritize your product backlog.

Product Backlog has been groomed based on the following criteria-

- Business Value/Story Point
- Required for MVP
- Story point total limits up to 30 points per sprint
- Sprint 1 has User stories that have high business value/ story point and have Required for MVP as YES, with 26 story points being covered in 2 weeks.
- Sprint 2 has User stories that have high business value/ story point but have US, which has Required for MVP as YES as well as NO, with 27 story points being covered in 2 weeks.

- Sprint 3 has User stories that have lower business value/ story point and have US, which has Required for MVP as NO, with 29 story points being covered in 2 weeks.
- Sprint 4 has User stories that have the lowest business value/ story point and has US, which has Required for MVP as NO, with 29 story points being covered in 2 weeks.

2. A copy of your groomed, prioritized product backlog in Excel below indicating which sprint each user story will be worked on.

	Sprint #	User Stories/Tasks	required for MVP	Name	Narrative Description	Story Points (1,2,3,5,8,13,21)	Business Value Points (1,2,3,5,8)	Business Value/Story Point
2	Sprint 1	User Story 05	Yes	Change payroll Deductions	As an employee I want the ability to display and edit payroll deductions.	1	8	8
3	Sprint 1	User Story 06	Yes	Ability to Display Pre-tax Deductions	As an employee, I would like to view my pre-tax deductions	1	5	5
4	Sprint 1	User Story 03	Yes	Change W-4 Info	As an employee, I would like the ability to change my W4 information, so that I can manage how	1	3	3
5	Sprint 1	User Story 36	Yes	Employee Validation Rules	As an HR admin, I would like the ability to add employee validation rules	1	3	3
6	Sprint 1	User Story 15	Yes	Enter expenses	As an employee, I would like to enter and submit travel and other valid expenses.	3	8	2.66666667
7	Sprint 1	User Story 17	Yes	Annual enrollment of benefits	As a HR Administrator, I want the ability to provide annual enrollment of benefits to every eligib	3	8	2.66666667
8	Sprint 1	User Story 34	Yes	Allowance for W-2 Hourly Employees	As an HR admin, I would like the ability to add allowance for W-2 hourly employees	3	8	2.66666667
9	Sprint 1	User Story 08	Yes	Ability to Print a Pay-stub Form	As an employee, I would like to ability to print my pay-stub from any pay period.	2	5	2.5
10	Sprint 1	User Story 12	Yes	Submit Reimbursable medical expenses	As an employee, I would like to have the ability to enter and request reimbursable medical expen	2	5	2.5
11	Sprint 1	User Story 33	Yes	SOX Audit Compliance Reporting	As an HR admin, I would like the ability to query and generate audit reports for SOX audits.	2	5	2.5
12	Sprint 1	User Story 37	Yes	Charitable Contribution Tax Savings	As an employee, I would like to understand how much tax savings were generated because of my	1	2	2
13	Sprint 1	User Story 16	Yes	Life insurance enrollment	As an employee, I would like to enroll for life insurance for myself and my family members.	3	5	1.66666667
14	Sprint 1	User Story 38	Yes	Notification of Changes to Deductions	As an employee, I would like the ability to be notified of any changes to my payroll deductions	3	5	1.66666667
15	Sprint 2	User Story 22	Yes	View Employee Stock Purchase Program information	As an employee, I would like to view the employee stock purchase information and access resour	5	8	1.6
16	Sprint 2	User Story 23	Yes	Print W-2	As an employee, the information on your W-2 is extremely important when preparing your tax re	5	8	1.6
17	Sprint 2	User Story 10	Yes	Calc 401k tax savings	As an employee, I want to calculate my 401k tax savings. Would be nice to have the ability to var	2	3	1.5
18	Sprint 2	User Story 24	Yes	Charitable contribution edit	As an employee, I would like to view, select and elect to contribute charitable donations to a cha	5	3	0.6
19	Sprint 2	User Story 28	Yes	Update personal profile info	As an employee, I want to the option to update my profile information so that it reflects the late	8	3	0.375
20	Sprint 2	User Story 41	No	Links to Outside Charitable Contributions	As an employee, I would like the ability to register my charitable organization for automatic pay	1	8	8
21	Sprint 2	User Story 07	No	Ability to View Pay-stub from any Pay Period	As an employee, I would like to view my paystubs for any period during the last 2 years. Need to a	1	3	3
22	Sprint 3	User Story 35	No	Usability for Employee Experience	As an employee, I would like the ability to use the portal on a number of devices. Also need to ab	3	8	2.66666667
23	Sprint 3	User Story 11	No	Request planned vacation	As an employee, I would like to submit a request for vacation to my manager. The request can on	2	5	2.5
24	Sprint 3	User Story 04	No	Change Investment Options	As an employee, I want the ability to display and edit retirement account investment options. Th	1	2	2
25	Sprint 3	User Story 13	No	Set up automatic deposit	As an employee, I would like to ability to set up automatic deposits for payroll and medical reim	2	3	1.5
26	Sprint 3	User Story 01	No	Maintain vacation/holiday calendar	As an employee, I can create, update and delete my vacation calendar and flexible holiday sched	1	1	1
27	Sprint 3	User Story 02	No	Display vacation/holiday calendar	As an employee, I would like to view my current vacation and flexible holiday schedule, so that I	1	1	1
28	Sprint 3	User Story 09	No	List all paystubs available	As an employee, I would like to view all available paystubs so that I can view any one that I have	2	2	1
29	Sprint 3	User Story 14	No	Submit education request	As an employee, I would like to submit a request for an educational investment to my manager. I	3	3	1
30	Sprint 3	User Story 20	No	Set up Health Savings Acct	As an employee, I would like to option to set up my Health Savings Account via the employee por	3	3	1
31	Sprint 3	User Story 26	No	Export to Payroll service	As an admin, I would like to enroll export updates to employee profile information to the payroll	8	8	1
32	Sprint 3	User Story 18	No	Enroll for Company Provided Tutorials	As an employee, I would like to enroll in courses and tutorials that are offered through the comp	3	2	0.66666667
33	Sprint 4	User Story 39	No	Separate Pop-Up Windows	As a UI designer, I would like to standardize all pop-up windows	3	2	0.66666667
34	Sprint 4	User Story 27	No	Import from payroll service	As an HR admin, I would like the ability to import the latest payroll run for an employee.	8	5	0.625
35	Sprint 4	User Story 40	No	Links to Outside Investments	As an employee, I would like the ability to link to investments outside my company payroll	2	1	0.5
36	Sprint 4	User Story 21	No	Add/change dependents	As an employee, I would like the ability to add or remove dependents.	5	2	0.4
37	Sprint 4	User Story 19	No	Payroll admin entry/update	As an HR admin, I would like the ability to manage the payroll administration and configuration	3	1	0.33333333
38	Sprint 4	User Story 30	No	Shop for company logo items	As the Head of HR, I would like to offer a number of company logo items for purchase to our emp	8	2	0.25

1	Sprint #	User Stories/Tasks	Requirement MVP	Name	Narrative Description	Story Points (1,2,3,5,8,13,21)	Business Value Points (1,2,3,5,8)	Business Value/Story Point
39	Backlog 1	User Story 29	No	Update Employee Stock Purchase options	Display and provide ability to edit/change contribution to employee stock purchase program.	13	3	0.230769231
40	Backlog 1	User Story 25	No	Community volunteer options	As an employee, I would like to option to view, research and sign up for community volunteer op	5	1	0.2
41	Backlog 2	User Story 31	No	Wellness program	As a HR leader, I would like to have the wellness program information available and easily access	13	2	0.153846154
42	Backlog 2	User Story 32	No	Quicken download	As a HR admin, I would like the ability to download journal entries from Quicken.	21	1	0.047619048

Part 5 - Product Backlog using JIRA Software

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- Roadmap
- Backlog
- Board

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- Code

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Backlog

SR 👤 Epic ▾

Insights

▼ Backlog (41 issues)

163 4 0 Create sprint

SIM-2 Change payroll Deductions	1 TO DO ▾	👤
SIM-3 Ability to Display Pre-tax Deductions	1 TO DO ▾	👤
SIM-4 Change W-4 Info	1 TO DO ▾	👤
SIM-5 Employee Validation Rules	1 TO DO ▾	👤
SIM-6 Enter expenses	3 TO DO ▾	👤
SIM-7 Annual enrollment of benefits	3 TO DO ▾	👤
SIM-8 Allowance for W-2 Hourly Employees	3 TO DO ▾	👤
SIM-9 Ability to Print a Pay-stub Form	2 TO DO ▾	👤
SIM-10 Submit Reimbursable medical expenses	2 TO DO ▾	👤
SIM-11 SOX Audit Compliance Reporting	2 TO DO ▾	👤
SIM-12 Charitable Contribution Tax Savings	1 TO DO ▾	👤
SIM-13 Life Insurance enrollment	3 TO DO ▾	👤
SIM-14 Notification of Changes to Deductions	3 TO DO ▾	👤
SIM-15 View Employee Stock Purchase Program Information	5 TO DO ▾	👤

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Backlog

SR Epic

SIM-29	Submit education request	3	TO DO	
SIM-30	Set up Health Savings Acct	3	TO DO	
SIM-31	Export to Payroll service	8	TO DO	
SIM-32	Enroll for Company Provided Tutorials	3	TO DO	
SIM-33	Separate Pop-Up Windows	3	TO DO	
SIM-34	Import from payroll service	8	TO DO	
SIM-35	Links to Outside Investments	2	TO DO	
SIM-36	Add/change dependents	5	TO DO	
SIM-37	Payroll admin entry/update	3	TO DO	
SIM-38	Shop for company logo items	8	TO DO	
SIM-39	Update Employee Stock Purchase options	13	TO DO	
SIM-40	Community volunteer options	5	TO DO	
SIM-41	Wellness program	13	TO DO	
SIM-42	Quicken download	21	TO DO	

+ Create issue

Quickstart

9°C Mostly sunny

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SIM Sprint 1

19 days remaining Complete sprint

GROUP BY None Insights

TO DO 13 ISSUES	IN PROGRESS	DONE
Change payroll Deductions SIM-2		
Ability to Display Pre-tax Deductions SIM-3		
Change W-4 Info SIM-4		
Employee Validation Rules SIM-5		
Enter expenses		

8°C Cloudy

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Insights

SIM Sprint 1

5 Dec – 16 Dec

(13 issues)

26

0

0

Complete sprint

...

SIM Sprint 2

19 Dec – 30 Dec

(7 issues)

27

0

0

Start sprint

...

SIM Sprint 3

2 Jan – 13 Jan

(11 issues)

29

0

0

Start sprint

...

SIM Sprint 4

16 Jan – 27 Jan

(6 issues)

29

0

0

Start sprint

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By,
Vaishnavi Arni Lakshmana Rao