

Benefits and Administration Team (BAAT) Release Plan

Part 1 - Project Charter (20 points)

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

Part 1 - Project Charter

Project Name: Benefits Administration Agile Team (BAAT) Portal Development

Project Description:

This project involves developing an intranet-based employee benefits and payroll system for Uniworld. The portal will be a single access point for all employee benefits, including medical, dental, prescription, vision, flex-spending accounts, and 401K options. It will also provide essential HR resources such as benefit plan coverage, enrollment information, plan descriptions, claim forms, links to provider directories, and frequently asked questions. By consolidating these features, the portal will enhance HR responsiveness and support integration with Uniworld's recent acquisition of Whistle While You Work.

Project Purpose:

To empower Uniworld employees by providing secure, intuitive, and round-the-clock access to all personal benefits and payroll information. The portal will serve as a comprehensive resource for employees, offering online enrollment options, W-4 maintenance, downloadable employee handbooks, and concise explanations of Federal and State benefits requirements. This system is critical to meeting Uniworld's merger integration objectives and facilitating open enrollment during the annual benefits period.

Measurable Objectives and Success Criteria:

- Deliver a Minimum Viable Product (MVP) by the end of Sprint #4 (within two months).
- Ensure portal response time is less than 2 seconds across all major browsers.
- Provide a user-friendly interface requiring minimal training.
- Achieve successful user acceptance testing (UAT) with no critical defects.

Summary Milestone Schedule:

1. **Phase 1:** Finalize backlog and technical architecture.
2. **Phase 2:** Develop and test core functionalities (benefits and payroll modules). Deliver MVP.
3. **Phase 3:** Deploy the MVP, integrate supporting documentation, and secure access.
4. **Phase 4:** Conduct UAT and peer review.

Project Budget: \$50,000

Product Owner: Farley Gnu

Project Sponsor: Michael Russell

Scrum Master: Phillip Bowden and Susan Mcfee

Customers of the website: Human Resources organization of Uniworld

End Users: Uniworld's employees

Part 2 - Product Vision and Personas (20 points)

1. Read all of the background material on the BAAT project and develop a vision statement. The vision statement should be clear concise description of the product clearly describing the value of the product. Please refer to the class notes for advice and tips on creating a good vision statement.

Vision Statement:

"To deliver an integrated, secure, and user-centric benefits and payroll platform that empowers Uniworld employees to easily access and manage their personal and financial resources. This platform will enhance employee satisfaction and streamline HR processes by offering real-time, self-service access to benefits, payroll data, and essential HR information, ultimately supporting Uniworld's commitment to a responsive and efficient employee experience."

2. Create one persona for each of the following user roles.

- a. Employee
- b. HR Admin
- c. HR Leader

Each persona should fit on a single page and have the following information: name, age, occupation, picture, personal narrative, goals, behaviors, challenges/pain points, and context.

NOTE: The user personas are attached in the end as it was created in the Canva.

Part 3 - Release Plan (20 points)

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 releases total do you have planned?

Release Plan Strategy:

The first release will focus on delivering a Minimally Viable Product (MVP), which includes the core functionality that provides the most business value.

Subsequent releases will include additional features or improvements.

Release date of the MVP: 18th December, 2024 (Sprint 2)

Sprint Breakdown:

Based on the prioritization of user stories by business value per story point, here's how we can distribute all user stories across four sprints:

Sprint	Start Date	End Date	Some User Stories Included
Sprint 1	12.01.24	12.14.24	Change payroll Deductions (1 SP), Enter expenses (3 SP), Ability to Print a Pay-stub Form (2 SP) Charitable Contribution Tax Savings (1 SP) View Employee Stock Purchase Program information (5 SP)
Sprint 2	12.15.24	12.28.24	Charitable contribution edit (5 SP), Update personal profile info (8 SP), Links to Outside Charitable Contributions (1 SP) Usability for Employee Experience (3 SP), Request planned vacation (2 SP)
Sprint 3	12.29.24	01.11.25	Enroll for Company Provided Tutorials (3 SP), Import from payroll service (8 SP), Links to Outside Investments (2 SP), Add/change dependents (5 SP), Payroll admin entry/update (3 SP)
Sprint 4	1.12.25	1.25.25	Community volunteer options (3 SP), Wellness program (13 SP), Quicken download (21 SP)

Release Plan:

Since we have two major releases planned—one for the MVP and one for additional functionality—here’s how the releases are structured:

Release 1: MVP Release: Core Functionality

Release Date: December 14, 2024

Release Sprint: Sprint 1

Stories Included: Change payroll Deductions, Life Insurance enrollment, Enter expenses, Ability to Print a Pay-stub Form, Notification of Changes to Deductions.

Release 2: MVP Release: Additional functionality related to the MVP

Release Date: December 18, 2024

Release Sprint: Sprint 2

Stories Included: Charitable Contribution Edit, Update Personal Profile Information

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

Release 1: MVP Release – Core Functionality

Release Date: December 14, 2024

Release Sprint: Sprint 1

Some of the stories included are as follows:

- **User Story 05:** Change Payroll Deductions
- **User Story 06:** Display Pre-Tax Deductions
- **User Story 03:** Change W-4 Information
- **User Story 15:** Enter Expenses
- **User Story 08:** Ability to Print a Pay-Stub Form
- **User Story 16:** Life Insurance Enrollment
- **User Story 36:** Employee Validation Rules

It includes a total of 16 user stories that will be released as a part of the MVP’s core functionality in the first release.

Explanation: Release 1 (MVP) focuses on delivering essential features, such as payroll and benefit management functionalities. Employees gain the ability to manage deductions, print pay stubs, and enroll in life insurance. These core features ensure the system is operational for immediate use.

Release 2: MVP Completion – Enhanced Employee Services

Release Date: December 18, 2024

Release Sprint: Sprint 2

Stories Included:

- **User Story 24:** Charitable Contribution Edit
- **User Story 28:** Update Personal Profile Information

Explanation: Release 2 completes the MVP by enhancing the portal's functionality with employee-facing features. These include annual benefit enrollment etc. which improve usability and allow efficiency.

Part 4 – Groomed 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.

Approach to Grooming the Product Backlog

Backlog grooming is the process of reviewing, updating, and prioritizing items in the product backlog to ensure that they are ready for upcoming sprints. The goal is to make sure that the most valuable work is being done first, and that each task or user story is well-defined and small enough to fit into a sprint.

We have used the Business Value/Story Point Approach as a major rule to groom our Project backlog, keeping in mind the completion of the MVP as a priority.

Assumptions:

- 1) The team is working with a 7 days working week.
- 2) The Start date of the Project is Dec 1, 2024.

Here is a list of all the rules we used to prioritise the product backlog:

- 1) Set tasks with "Required for MVP" as **"Yes"**
- 2) Prioritize Tasks Based on Business Value/Story Points
- 3) Understanding the Sprint Duration and Velocity
- 4) Calculate Average Story Points Completed Per Working Day
- 5) Assign Tasks to Specific Dates
- 6) Monitor Progress, Reassess and Regroom

The approach used to groom the product backlog is as follows:

1) Set tasks with “Required for MVP” as “**Yes**”

To ensure the MVP is ready as quickly as possible, it’s crucial to prioritize tasks essential for its completion. Therefore, the first step is to custom-sort tasks, marking those required for the **MVP as “Yes”** and giving them the highest priority.

2) Prioritize Tasks Based on Business Value/Story Points

To prioritize tasks that deliver the highest business value relative to their story points, we calculate the *Business Value per Story Point* for each task using the formula:

Business Value per Story Point = Business Value / Story Points

For example, for User Story 5:

- **Story Points: 1**
- **Business Value Delivered: 8**
- **Business Value per Story Point: $8/1 = 8$**

This approach ensures we focus on tasks that maximize business value efficiency. Prioritizing solely based on story points or business value alone can be challenging and less effective.

We then apply a custom sort filter to prioritize tasks based on their inclusion in the MVP and the highest business value delivered per story point. This ensures optimal alignment with the project goals and efficient resource utilization.

3) Understanding the Sprint Duration and Velocity

To calculate the average velocity for each sprint, we use the total story points and the sprint duration:

- **Total Number of Sprints: 4**
- **Duration of Each Sprint: 14 days**
- **Total Story Points: 163**
- **Average Velocity per Sprint: 40.75 story points**

Tasks have varying story points, ranging from 5 to 21. Using the custom sort filter based on MVP requirements and business value per story point, we will group and allocate tasks into each sprint, ensuring an optimal balance and alignment with the calculated average velocity.

4) Calculate Average Story Points Completed Per Working Day

Using the steps above, we calculated the story points for each of the 4 sprints.

Assuming the team works 7 days a week, we determined the story points completed per working day for all the 4 sprints by using the formula:

Story Points per Working Day = Story Points in the Sprint / Number of Working Days

Finally, we averaged the story points completed per working day across all sprints, finding that the team can complete approximately 2.91 story points daily. This indicates that the team can consistently cover 2–3 story points worth of tasks each working day.

	Story points	Days	Story points that can covered per working day
Sprint 1	38	14	2.714285714
Sprint 2	41	14	2.928571429
Sprint 3	45	14	3.214285714
Sprint 4	39	14	2.785714286
Avg Story Points covered per working day			2.910714286

5) Assign Tasks to Specific Dates

We have assumed the project start date to be December 1, 2024. Based on the calculated average of 2.91 story points completed per working day, we created a column indicating the **number of days required to complete each task**. This approach aligns perfectly with the project timeline, as each sprint concludes within the required 14-day duration specified in the case.

Name	Story Points (1,2,3,5,8,13,21)	Days	Start Date	End Date	Business Value Points (1,2,3,5,8)	Business Value/ Story points
Change payroll Deductions	1	0.34	12/1/24	12/1/24	8	8
Ability to Display Pre-tax Deductions	1	0.69	12/1/24	12/1/24	5	5
Change W-4 Info	1	1.03	12/1/24	12/2/24	3	3
Employee Validation Rules	1	1.37	12/2/24	12/2/24	3	3
Enter expenses	3	2.41	12/2/24	12/3/24	8	2.666666667
Annual enrollment of benefits	3	3.44	12/4/24	12/5/24	8	2.666666667
Allowance for W-2 Hourly Employees	3	4.47	12/5/24	12/6/24	8	2.666666667
Ability to Print a Pay-stub Form	2	5.15	12/6/24	12/6/24	5	2.5
Submit Reimbursable medical expenses	2	5.84	12/6/24	12/7/24	5	2.5
SOX Audit Compliance Reporting	2	6.53	12/7/24	12/7/24	5	2.5
Charitable Contribution Tax Savings	1	6.87	12/7/24	12/8/24	2	2
Life Insurance enrollment	3	7.90	12/8/24	12/9/24	5	1.666666667
Notification of Changes to Deductions	3	8.93	12/9/24	12/10/24	5	1.666666667
View Employee Stock Purchase Program information	5	10.65	12/10/24	12/13/24	8	1.6
Print W-2	5	12.37	12/13/24	12/14/24	8	1.6
Calc 401k tax savings	2	13.06	12/14/24	12/14/24	3	1.5
Charitable contribution edit	5	14.78	12/15/24	12/16/24	3	0.6
Update personal profile info	8	17.53	12/16/24	12/18/24	3	0.375
Links to Outside Charitable Contributions	1	17.87	12/18/24	12/19/24	8	8
Ability to View Pay-stub from any Pay Period	1	18.21	12/19/24	12/20/24	3	3
Usability for Employee Experience	3	19.24	12/20/24	12/20/24	8	2.666666667
Request planned vacation	2	19.93	12/20/24	12/21/24	5	2.5
Change Investment Options	1	20.27	12/21/24	12/21/24	2	2
Set up automatic deposit	2	20.96	12/21/24	12/22/24	3	1.5

Based on the calculated number of days required to complete each task, we assigned a start date and end date to each task within the respective sprint.

For example, if a task requires 3.44 days to complete and the team averages 2.91 story points per day, the task will take 4 days. In this case, it would start on December 4, 2024, and end on December 5, 2024, according to our calculations.

Using this approach, we manually assigned dates for all tasks across all sprints and user stories, factoring in the number of days required and the average story points completed per day.

6) Monitor Progress, Reassess and Regroom

After each sprint, we have reassessed the backlog to ensure that we are still working on the highest-value items for future sprints. We have monitored progress after every sprint and remained flexible to adjust the timelines and cover the required tasks basis the average story points per day. If we're falling behind or ahead, we have adjusted task priorities accordingly.

3. Paste a copy of your groomed, prioritized product backlog below indicating which sprint each user story will be worked on.

BAAT Initial Product Backlog - Last Modified: 58m ago				
	User Stories/Tasks	Required for MVP	Name	Narrative Description
1				
2	User Story 05	Yes	Change payroll Deductions	As an employee I want the ability to display and edit payroll deductions.
3	User Story 06	Yes	Ability to Display Pre-tax Deductions	As an employee, I would like to view my pre-tax deductions
4	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 much federal income tax car
5	User Story 36	Yes	Employee Validation Rules	As an HR admin, I would like the ability to add employee validation rules
6	User Story 15	Yes	Enter expenses	As an employee, I would like to enter and submit travel and other valid expenses.
7	User Story 17	Yes	Annual enrollment of benefits	As a HR Administrator, I want the ability to provide annual enrollment of benefits to every eligible employee.
8	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
9	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.
10	User Story 12	Yes	Submit Reimbursable medical expenses	As an employee, I would like to have the ability to enter and request reimbursable medical expenses.
11	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.
12	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 charitable contributions
13	User Story 16	Yes	Life Insurance enrollment	As an employee, I would like to enroll for life insurance for myself and my family members.
14	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
15	User Story 22	Yes	View Employee Stock Purchase Program informatio	As an employee, I would like to view the employee stock purchase information and access resources if I have further question
16	User Story 23	Yes	Print W-2	As an employee, the information on your W-2 is extremely important when preparing your tax return.
17	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 vary my 401k contribution and

BAAT Initial Product Backlog - Last Modified: 59m ago				
	User Stories/Tasks	Required for MVP	Name	Narrative Description
18	User Story 24	Yes	Charitable contribution edit	As an employee, I would like to view, select and elect to contribute charitable donations to a charity of my choice. Have the o
19	User Story 28	Yes	Update personal profile info	As an employee, I want the option to update my profile information so that it reflects the latest changes.
20	User Story 41	No	Links to Outside Charitable Contributions	As an employee, I would like the ability to register my charitable organization for automatic payroll contributions
21	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 ability to pick a pay period a
22	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 ability to use the accessibility f
23	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 only be for a vacation up to a y
24	User Story 04	No	Change Investment Options	As an employee, I want the ability to display and edit retirement account investment options. The company offers a number i
25	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 reimbursements. Set up should in
26	User Story 01	No	Maintain vacation/holiday calendar	As an employee, I can create, update and delete my vacation calendar and flexible holiday schedule on the benefits portal so t
27	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 can manage my benefit plan
28	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 need to.
29	User Story 14	No	Submit education request	As an employee, I would like to submit a request for an educational investment to my manager. The education request is for .
30	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 portal
31	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 service. The payroll service i

BAAT Initial Product Backlog - Last Modified: 59m ago				
	User Stories/Tasks	Required for MVP	Name	Narrative Description
32	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 company learning portal.
33	User Story 39	No	Separate Pop-Up Windows	As a UI designer, I would like to standardize all pop-up windows
34	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.
35	User Story 40	No	Links to Outside Investments	As an employee, I would like the ability to link to investments outside my company payroll
36	User Story 21	No	Add/change dependents	As an employee, I would like the ability to add or remove dependents.
37	User Story 19	No	Payroll admin entry/update	As an HR admin, I would like the ability to manage the payroll administration and configuration
38	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 employees, so that they feel a se
39	User Story 29	No	Update Employee Stock Purchase options	Display and provide ability to edit/change contribution to employee stock purchase program. Select the per payroll contribut
40	User Story 25	No	Community volunteer options	As an employee, I would like to option to view, research and sign up for community volunteer opportunities. This is an emplo
41	User Story 31	No	Wellness program	As a HR leader, I would like to have the wellness program information available and easily accessible to all employees, so that
42	User Story 32	No	Quicken download	As an HR admin, I would like the ability to download journal entries from Quicken.

Part 5 - JIRA Software (20 points)

1. Create a free account on JIRA Software using the instructions provided on eLearning. Use the information provided in parts 1, 2, 3 and 4 to create a new BAAT project on the JIRA Software platform. Use the JIRA Scrum template and import all user stories into the JIRA platform. Add your project documents to the project space in Confluence. Paste a screenshot of each page of JIRA and Confluence below.

The screenshot displays the JIRA Software interface for a project named "BAAT--Group 3". The left sidebar shows the project navigation menu with options like "Backlog", "Board", "Forms", "Add view", "Code", "Project pages", and "Project settings". The main content area shows the "Backlog" view for the "DB Sprint 1" (0 issues). Below the sprint header, there is a list of 8 issues, each with a green status icon, a title, a priority, and a count. The issues are:

ID	Title	Priority	Count
DB-1	Maintain vacation/holiday calendar	TO DO	1
DB-2	Display vacation/holiday calendar	TO DO	1
DB-3	Change W-4 Info	TO DO	1
DB-4	Change Investment Options	TO DO	1
DB-5	Change payroll Deductions	TO DO	1
DB-6	Ability to Display Pre-tax Deductions	TO DO	1
DB-7	Ability to View Pay-stub from any Pay Period	TO DO	1
DB-8	Ability to Print a Pay-stub Form	TO DO	2

← → ↻ varmis2405.atlassian.net/jira/software/projects/DB/pages

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BAAT--Group 3
Software project

PLANNING
Timeline
Backlog
Board
Forms **NEW**
+ Add view

DEVELOPMENT
Code

Project pages
Project settings
Archived issues **NEW**

Projects / BAAT--Group 3
Project pages

Demo-BAAT

Show drafts

BAAT--Group 3 Updated less than a minute ago

Powered by Confluence

Create a page
POPULAR TEMPLATES

- Blank page
Start a page from scratch.
- Product requirements
Define, track and scope requirements for your product or feature.
- Decision
Record important project decisions and communicate them with your team.
- Meeting notes
Set meeting agendas, take notes, and share action items with your team.
- Retrospective
What went well? What could have gone better? Crowdsourcing improvements with your team.

More templates

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Demo-BAAT

All content
Automation **PREMIUM**
Analytics **PREMIUM**
Content manager...
Calendars **PREMIUM**
Space settings

SHORTCUTS +
No shortcuts in this space

CONTENT +
Search by title

Template - Project ...

Invite people

Demo-BAAT

Share ... Star this space

BAAT--Group 3

Project Charter.docx

Part 2 - User Personas.pdf
19 Nov 2024, 09:20 AM

Part 3 - Release Plan.docx
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