



The KSA (Kuali Student Account) Project

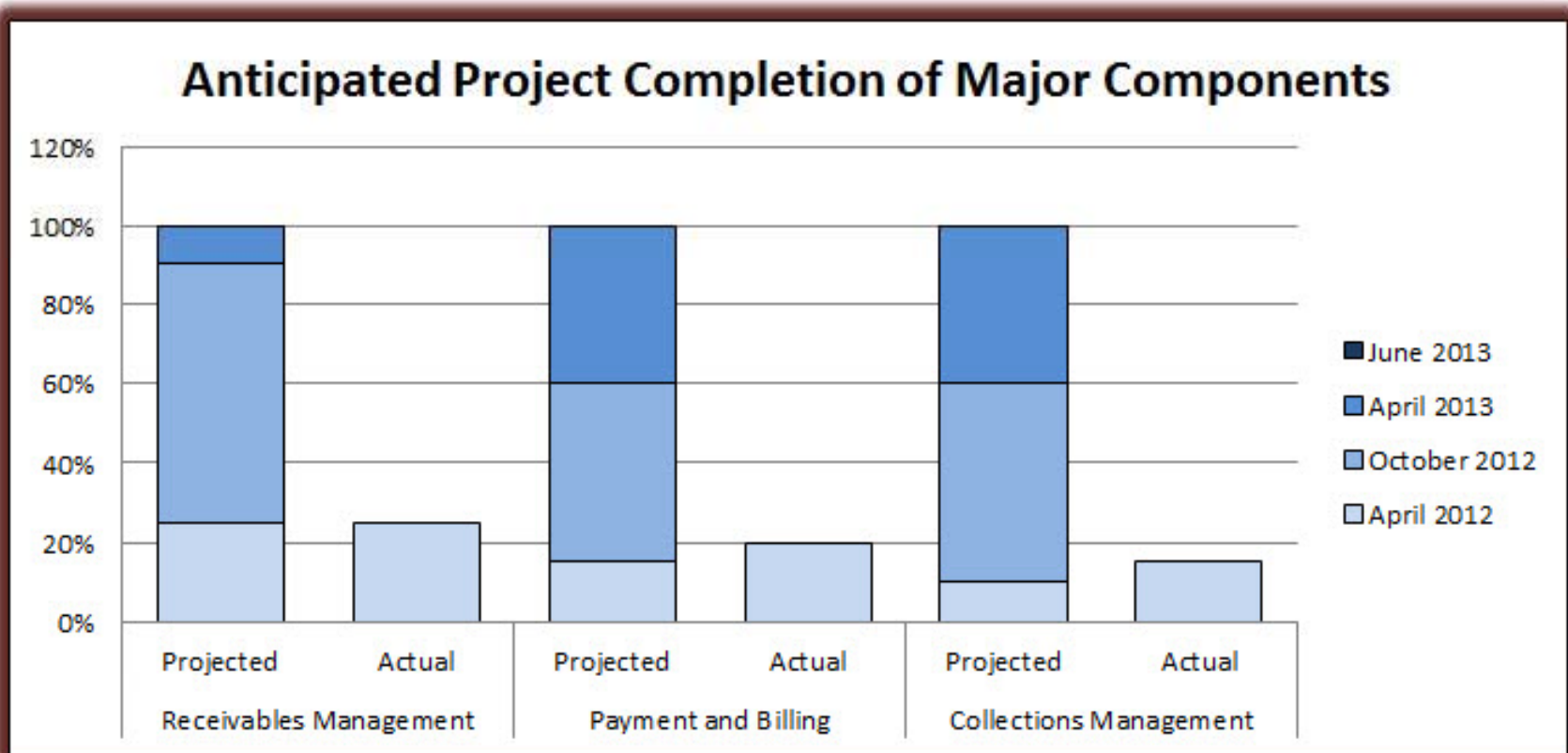
April 25, 2012 Board Presentation

Recent Notable Completion Dates

- **Mar 09:** Published KSA-PB (Payment Billing)/TP (Third Party)/CM (Collections Management) requirements on Wiki
- **Mar 17:** Published KSA-RM UX Personas on Wiki
- **Mar 17:** Published designed KSA-RM use cases, data representation and ER diagrams
- **Mar 21:** Published KSA-RM UX Wireframes. Stakeholder review/approval period started.
- **Mar 26:** KS-Community comment period ended for KSA-FM
- ***Mar 31:** KSA-FM rules design signoff (epic dev - phase 2)

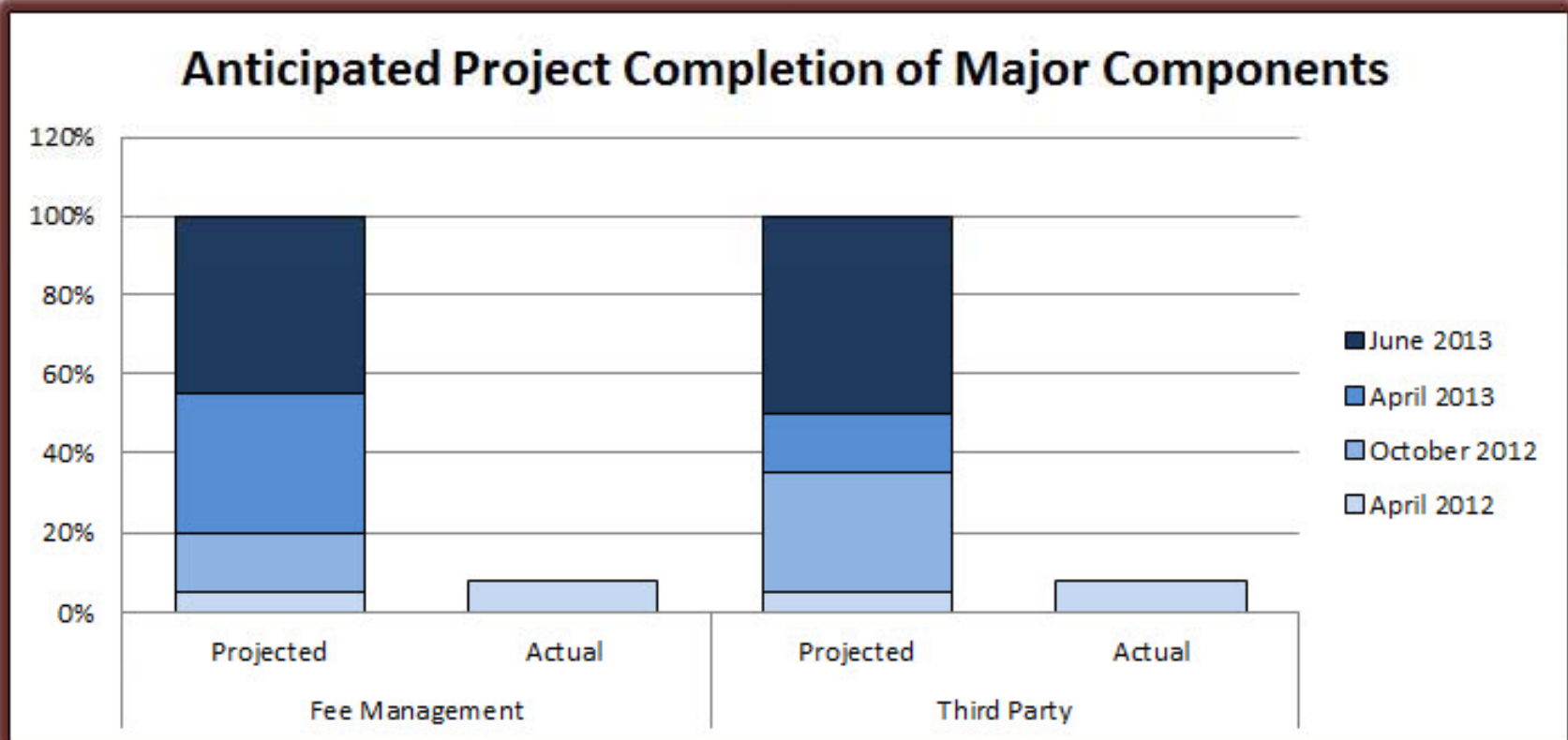
*KE / Kuali Community interaction necessary, task to be rescheduled

The KSA Project: Phase 1 Tasks



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The KSA Project: Phase 2 Tasks



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Major Milestone (1) Completion Announcement

- Thin Slice of KS Interaction and Kuali Technology Stack
 - Announced April 16, 2012
 - Use of KRAD, KIM, and KSA services
 - Kuali Rice 2.x framework
 - End-to-end in the Kuali technical stack



Major Milestone (2) Completion Announcement

- Transaction View of Student Receivables
 - Announced April 16, 2012
 - Strategic functional milestone
 - Unfiltered transaction view and account summary
 - Originally projected for 4Q 2012

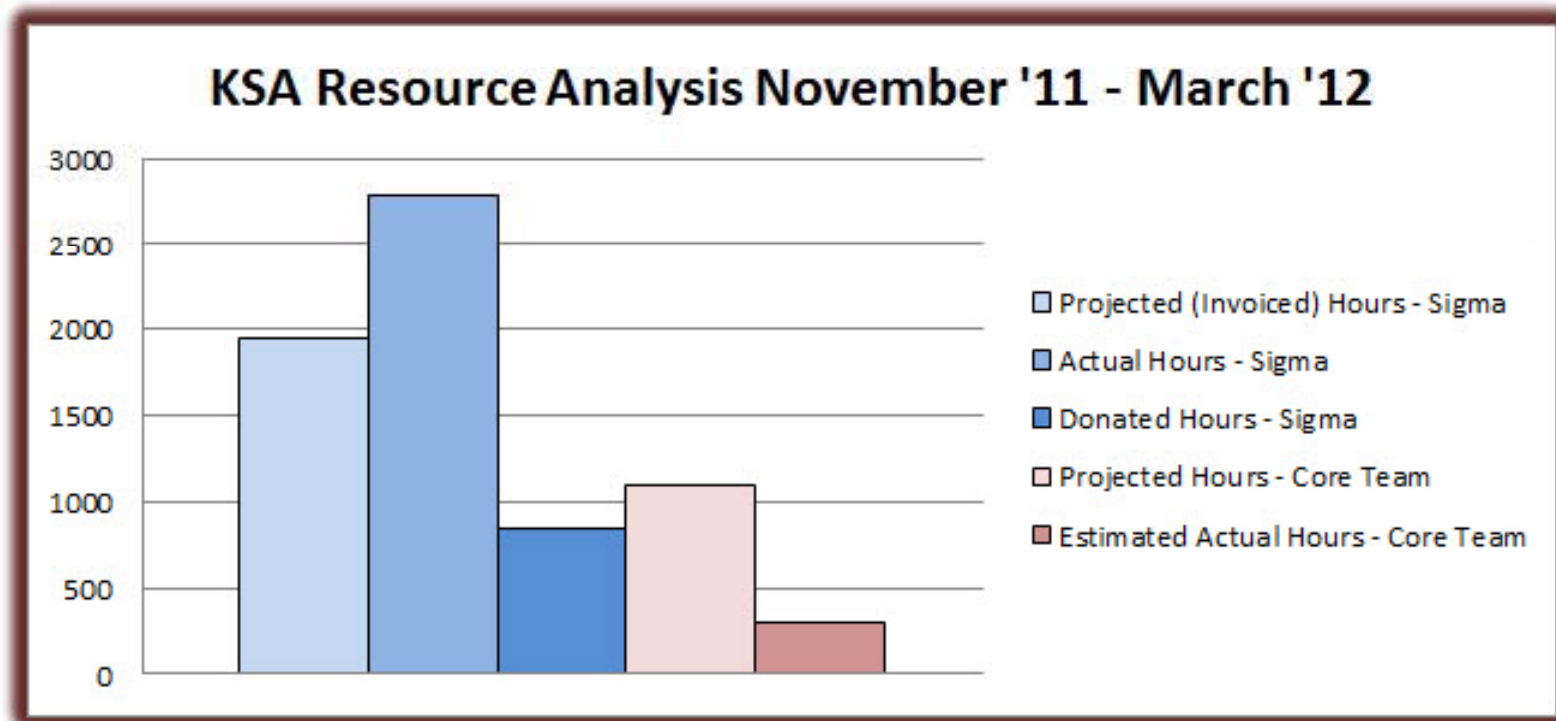


KSA Remaining Milestones



- Phase 1
 - Integration with KFS (3Q,2012)
 - Account ageing and delinquency (4Q, 2012)
- Phase 2
 - Fee Assessment (2Q, 2013)
 - Third Party Billing (2Q, 2013)

Resource Analysis



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KSA Technical Assessment



- Toolset: Adapted Quickly by Sigma's Core Team Staff
 - KRAD: knowledge is expanding
 - Special thanks to KRAD Rice team
- KSA core team strategic interactions with Kuali Student core team have been beneficial for both teams. (Example – Holds)

Upcoming Notable Dates

- **May:** Begin Ageing, Interaction with KRMS and KFS, QA of Receivables Management and Dynamic Transaction View
- **July:** Demonstrable Ageing, Interaction to KRMS & KFS and Dynamic Transaction Views

Brief Presentation of Major Milestones by Justin Tilton

Sigma KSA Core UX Architect

Followed by Questions