**Document 1: Definition of Done**

Definition of Done means a product backlog item becomes an increment, in our project when defined Definition of done it is ready for release or deployment.

Below are the checklist items which we followed for Definition of done.

* After the changes were made by the developer, code was produced for release.

One of the user stories like kaloty load was made changes in fire and defined DoD to move to cortex.

* Assuming the User Story mentioned above is met, it is marked Done.
* Kaloty load made the needed changes based on the requirements from the client and marked Done.
* Unit Test Cases were written and tested by Developer, unit test cases are like fetching the data from fire and data should be retrieved based on the requirements.
* Once the user story is marked done, it is deployed to QA, and the Testing team will be testing the code for 2 weeks and then will be deployed to Prod parallel which should be the same as in QA.
* All testing should be done in the AquaStudio and compared in the Airflow and then should be marked passed.
* If there is a bug raised by QA team, it should be fixed by developer and then QA team should test again and marked Done.
* The feature was tested based on the Acceptance Criteria.

In this scenario, Acceptance Criteria was - Kaloty data loaded into Cortex from research.kaloty\_historical\_atr table, after the fire dag’s completes, cortex triggered data to kaloty atr table.

* The code changes made by developer was documented and even the test cases were placed in the test plan along with test results.
* Peer reviewed the code and approved for deployment and also test cases were also reviewed by the peer and then proceeded to release.

**Document 2- Product Vision**

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| **Scrum Project Name:** | Cortex Migration Project | | |
| **Venue:** | Onsite - New Jersey |  |  |
| **Date:** | **Start Time:** 06/06/2015 | **End Time: 10/31/2020** | **Duration: 724 months** |
| **Client:** | Alliance Bernstein |  |  |
| **Stakeholder List:** | DDH | Fire | Apex |
|  | Dinesha | Cadis | Nathan |
|  |  |  |  |
| **Scrum Team** | | | |
| **Scrum Master:** | Madhu Rao |  |  |
| **Product Owner:** | Sangeeta |  |  |
| **Scrum Developer1:** | Bala |  |  |
| **Scrum Developer2:** | Sravan |  |  |
| **Scrum Developer3:** | Divya |  |  |
| **Scrum Developer4:** | Karthik |  |  |
| **Scrum Developer5:** | Jeevan |  |  |

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| **Vision:** Migrate legacy server to new server containing all features with all databases to a newer version and updated system. | | | |
| **Target group** Market group is Investment Trading Sector. Target Users are upstream systems like Fire, Apex, Sentinel having all investment trade customers. | **Needs** Cortex Project ensures various trades data of different types of database source systems merged into one platform and put into one application for distribution to the upstream systems. This data migration gives several opportunities to entities to improve the quality of data, the performance of existing systems, and access to datasets. | **Product** It is a migration project. Cortex Project is desirable because in this project we Ensure data is completely and accurately migrated from the source platform to the target platform in accordance with company policies and relevant compliance standards. This means there are no records in the target environment that are missing, incomplete, or failed some form of validation. Hence it is a feasible product. | **Value** This project added a great value and massive impact to the Organization. This includes a reduction in the total cost of ownership (TCO), faster time to delivery, and enhanced opportunities for innovation. The main Business goal is to get the target system running as quickly as possible with a minimal amount of downtime and disruption to business operations Business Process Migration in Cortex Project is to transfer or transition of current business processes, systems, and operations from DDH setting to a Cortex system. |

**Document 3: User stories**

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| **User Story No.** 18492 | **Tasks:** Perform SOD Readiness | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to the perform\_lot extract so that I can improve the the execution time | | |
| **BV:** 400 **CP:**  2 | | |
| **Acceptance Criteria: Perform** extracts should be made changes so that execution time is reduced and also data should be distributed to the tables. | | |
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| **User Story No.** 18198 | **Tasks:** Muse: Modify Lot Level API for Non-Taxable accts | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to Lot table in custom schema so that i can run the script and view data though API | | |
| **BV:** 400 **CP:**  2 | | |
| **Acceptance Criteria:** Lot table and the stored procedure are made changes and passed through URL in Postman API. | | |
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| **User Story No.** 16499 | **Tasks:** Barra Decommission: Send Taxable Muni SOI to Kaloty | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to Taxable Muni Accounts in Cortex so that i can switch the code from Cortex to Kaloty and deliver to Quant Team | | |
| **BV: 3**00 **CP:**  3 | | |
| **Acceptance Criteria: changes** are made for Taxable Muni Accounts in Cortex table and code is switched from Cortex to Kaloty and deliver to Quant Team | | |
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| **User Story No.** 18387 | **Tasks:** Code fix to handle duplicate accounts in ACE | **Priority: 3** |
| **Value Statement:** AS a Developer I want to make changes to code to handle duplicate accounts so that i can handle the duplicate accounts in Cortex account load | | |
| **BV: 2**00 **CP:**  4 | | |
| **Acceptance Criteria: changes** are made to code to handle/remove duplicate accounts in Cortex account load and move the updated load to cortex. | | |
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| **User Story No.** 17970 | **Tasks:** Add new table into Redis - Research.MO\_CLUSTER\_Optimiser\_Parameters | **Priority: 3** |
| **Value Statement:** AS a Developer I want to make new table in redis schema so that i can optimise the code to pass data to API | | |
| **BV: 2**00 **CP:**  4 | | |
| **Acceptance Criteria:** Optimiser should be able read the data from this table and pass to API. | | |
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| **User Story No.** 16921 | **Tasks:** SMA missing positions QC should exclude closed accounts | **Priority: 2** |
| **Value Statement:** AS a Developer I want to filter out closed positions so that i can remove the closed accounts and from SMA positions | | |
| **BV: 3**00 **CP:**  3 | | |
| **Acceptance Criteria: closed** accounts should be filtered from SMA positions | | |
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| **User Story No.** 17896 | **Tasks:** Muse transactions and Taxable SMA control-M changes | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to control-m jobs so that i can add new column to Wash sale API and add control-m conditions | | |
| **BV:**  400  **CP:**  2 | | |
| **Acceptance Criteria:** changes should be made to control-m jobs and new column to Wash sale API should be added along with control-m conditions | | |
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| **User Story No.** 14053 | **Tasks:** Cortex Changes-TOB support via Cadis | **Priority: 1** |
| **Value Statement:** AS a Developer I want to Populated TOB data in Cortex and DDH via Cadis so that i can Extract and load data into FIRE from cortex and DDH | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** Tender Option Bond data is populated from Cortex and DDH via Cadis and extracted to FIRE for historical purposes. | | |
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| **User Story No.** 17510 | **Tasks:** Add additional fields in the existing GA extract | **Priority: 2** |
| **Value Statement:** AS a Developer I want to additional fields in the GA extract so that i can tax exempt for KRD's | | |
| **BV:**  300  **CP:**  3 | | |
| **Acceptance Criteria: New** fields are added to existing GA extract to tax exempt KRD | | |
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| **User Story No.** 17508 | **Tasks:** Lots API enhancement - getting data from Redis | **Priority: 2** |
| **Value Statement:** AS a Developer I want to enhance Lots API to get data from Redis so that i can trigger concurrent url's without any issues. | | |
| **BV:**  300  **CP:**  3 | | |
| **Acceptance Criteria:** Lots API should be enhanced to get data from redis instead of Cortex database to run concurrent urls' without any bottle neck. | | |
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| **User Story No.** 21398 | **Tasks:** Add new column to security xml and security outbound | **Priority: 2** |
| **Value Statement:** AS a Developer I want to add new column section\_4a2 to security xml and security extract. so that i can distribute the new addition to load through xml and extract. | | |
| **BV:**  200  **CP:**  4 | | |
| **Acceptance Criteria:** New column section\_4a2 should be added and distributed to security table through xml and security outbound. | | |
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| **User Story No.** 18492 | **Tasks:** Perform SOD Readiness | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to the perform\_lot extract so that I can improve the the execution time | | |
| **BV:** 400 **CP:**  2 | | |
| **Acceptance Criteria: Perform** extracts should be made changes so that execution time is reduced and also data should be distributed to the tables. | | |
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| **User Story No.** 3553 | **Tasks:** Cortex Regression Test Suite Updates | **Priority: 1** |
| **Value Statement:** AS a Developer I want to correct the regression suite so that i can view last records are updated from cortex to testing. | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** correct the regression suite to view last records are updated from cortex to testing. | | |
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| User Story No: 2501 | Tasks: Create Customer Registration Portal | Priority: HIGHEST |
| AS A CUSTOMER/USER | | |
| I WANT - Do the registration on the scrum food app | | |
| SO THAT - I can order food online | | |
| BV: 500 | | CP: 02 |
| ACCEPTANCE CRITERIA: Should have valid email; Send successful notification to the user | | |

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| User Story No: 25502 | Tasks: create login page for registered users | Priority: HIGHEST |
| AS A CUSTOMER/USER | | |
| I WANT - Login on the database | | |
| SO THAT - I can login to the database | | |
| BV: 500 | | CP: 02 |
| ACCEPTANCE CRITERIA: UserName, Password, Port details. Click on Register Button. Send Successful Notification to the user | | |

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| User Story No: 26037 | Tasks: Create list of tables and add in database | Priority: HIGHEST |
| AS A CUSTOMER/USER | | |
| I WANT - Search and view tables | | |
| SO THAT - I can choose the table and can explore it | | |
| BV: 500 | | CP: 02 |
| ACCEPTANCE CRITERIA: Should get the list of all the tables along with column names | | |

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| User Story No: 04765 | Tasks: Create list of menu databases | Priority: HIGHEST |
| AS A developer | | |
| I WANT - view databases as per the server systems | | |
| SO THAT - I can choose the database | | |
| BV: 200 | | CP: 3 |
| ACCEPTANCE CRITERIA: Should get the list of all the databases | | |

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| User Story No: 35105 | Tasks: Create list of views | Priority: HIGHEST |
| AS A CUSTOMER/USER | | |
| I WANT - view the views as per tables | | |
| SO THAT - I can choose the view and analyse | | |
| BV: 200 | | CP: 3 |
| ACCEPTANCE CRITERIA: Should get the list of all the views | | |

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| User Story No: 06432 | Tasks: Create the connection string | Priority: HIGHEST |
| AS A developer | | |
| I WANT – create a connection string | | |
| SO THAT - I can get connection established to databases | | |
| BV: 500 | | CP: 2 |
| ACCEPTANCE CRITERIA: once the connection is setup, database should be connected successfully | | |

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| User Story No. 14053 | Tasks: Cortex Changes-TOB support via Cadis | Priority: 1 | |
| **Value Statement:** AS a Developer I want to Populated TOB data in Cortex and DDH via Cadis so that i can Extract and load data into FIRE from cortex and DDH | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** Tender Option Bond data is populated from Cortex and DDH via Cadis and extracted to FIRE for historical purposes. | | |
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| **User Story No.** 14103 | **Tasks:** SMA missing positions QC should exclude closed accounts | **Priority: 2** |
| **Value Statement:** AS a Developer I want to filter out closed positions so that i can remove the closed accounts and from SMA positions | | |
| **BV: 3**00 **CP:**  3 | | |
| **Acceptance Criteria: closed** accounts should be filtered from SMA positions | | |
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| **User Story No.** 15001 | **Tasks:** Muse transactions and Taxable SMA control-M changes | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to control-m jobs so that i can add new column to Wash sale API and add control-m conditions | | |
| **BV:**  400  **CP:**  2 | | |
| **Acceptance Criteria:** changes should be made to control-m jobs and new column to Wash sale API should be added along with control-m conditions | | |
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| **User Story No.** 14099 | **Tasks:** Cortex Changes-TOB support via Cadis | **Priority: 1** |
| **Value Statement:** AS a Developer I want to Populated TOB data in Cortex and DDH via Cadis so that i can Extract and load data into FIRE from cortex and DDH | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** Tender Option Bond data is populated from Cortex and DDH via Cadis and extracted to FIRE for historical purposes. | | |
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| **User Story No.** 3556 | **Tasks:** Cortex Regression Test Suite Updates | **Priority: 1** |
| **Value Statement:** AS a Developer I want to correct the regression suite so that i can view last records are updated from cortex to testing. | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** correct the regression suite to view last records are updated from cortex to testing. | | |
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| User Story No: 2551 | Tasks: Create Customer Registration Portal | Priority: HIGHEST |
| AS A CUSTOMER/USER | | |
| I WANT - Do the registration on the scrum food app | | |
| SO THAT - I can order food online | | |
| BV: 500 | | CP: 02 |
| ACCEPTANCE CRITERIA: Should have valid email; Send successful notification to the user | | |

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| **User Story No.** 18692 | **Tasks:** Perform SOD Readiness | **Priority: 2** |
| **Value Statement:** AS a Developer I want to make changes to the perform\_lot extract so that I can improve the the execution time | | |
| **BV:** 400 **CP:**  2 | | |
| **Acceptance Criteria: Perform** extracts should be made changes so that execution time is reduced and also data should be distributed to the tables. | | |
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| **User Story No.** 3567 | **Tasks:** Cortex Regression Test Suite Updates | **Priority: 1** |
| **Value Statement:** AS a Developer I want to correct the regression suite so that i can view last records are updated from cortex to testing. | | |
| **BV:**  500  **CP:**  2 | | |
| **Acceptance Criteria:** correct the regression suite to view last records are updated from cortex to testing. | | |
|  |

**Document 4: Agile PO Experience**

The Product Owner is responsible for maximizing the value delivered by the team by ensuring that the team backlog is aligned with customer and stakeholder needs.

**❖ Following are the responsibilities of PO in a project**

* PO stood as a communication between the scrum team and the customers
* Our PO possessed decision making, excellent communication, time management and leadership skills.
* PO maintained and managed the Product Backlog.
* She also prioritizes the needs and objectives of the product, and she ensured that the development team delivered value to the client’s expectations and with quality.
* She also prioritized the requirements to put in the backlogs.
* She coordinated and overseed each stage of the development cycle.
* She was also responsible for the entire development process from the beginning to the final product.
* She was the primary point of contact on behalf of the customer to identify the product requirements for the development team.
* She conducted and participated in the daily Scrums, Sprint Planning Meetings, and Sprint Reviews and Retrospectives.
* She Defined and communicated product, sprint, and release goal(s). Ordered, created, and communicated backlog items and ensured the backlog is transparent and understood by every member in the scrum team.
* She also planned the user stories, ensured to have the acceptance criteria, BV and CP value for every user story.

**Document 5: Product and sprint backlog and product and sprint burndown charts**

**Product backlog:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Priority** | **BV** | **CP** | **Sprint** |
| 2343 | Decommission Analysis Module | Dummy Out jobs | 2 | 100 | 3 | 2 |
| 3591 | Cortex Enhancements | Analytics API | 2 | 400 | 2 | 2 |
| 2588 | Migrate all account master pipeline | ADF Migration Phase1 | 2 | 200 | 4 | 2 |

**Sprint backlog:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **User Story ID** | **User Story** | **Tasks** | **Owner** | **Status** | **Estimated Efforts** |
| 2343 | Decommission Analysis Module | Dummy Out jobs | Jeevan | New | 20 |
| 3591 | Cortex Enhancements | Analytics API | Karthik | New | 16 |
| 2588 | Migrate all account master pipeline | ADF Migration Phase1 | Divya | New | 15 |

**Product burndown**

A graph with a green line

Description automatically generated

**Sprint burndown**

A graph with a green line

Description automatically generated

**Document 6: Sprint meetings**

**Meeting Type 1: Sprint Planning meeting**

|  |  |
| --- | --- |
| **Date** | 12/20/2024 |
| **Time** | 9:00 AM EST |
| **Location** | Zoom Meeting |
| **Prepared By** | Sangeeta |
| **Attendees** | Sangeeta, Sravan, Bala |

**Agenda Topics**

|  |  |  |
| --- | --- | --- |
| **Topic** | **Presenter** | **Time Allotted** |
| Reviewing the Product Backlog | Sangeeta | 30 mins |
| Backlog Refinement | Sangeeta | 15 mins |
| Prioritizing product backlog items | Sangeeta | 15 mins |
| Sprint Goal | Sangeeta | 15 mins |
| Capacity | Sangeeta | 15 mins |

**Other Information**

|  |  |
| --- | --- |
| **Observers** | No observers |
| **Resources** | Scrum team, Product owner, Scrum Master |
| **Special Notes** | Be clear and concise, Focus on objectives |

**Meeting Type 2: Sprint review meeting**

|  |  |
| --- | --- |
| **Date** | 1/2/2025 |
| **Time** | 9:00 AM EST |
| **Location** | Zoom Meeting |
| **Prepared By** | Sangeeta |
| **Attendees** | The development team, Product Owner, and Scrum Master |

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| **Sprint Status** | **Things to Demo** | **Quick Updates** | **What's next** |
| Committed/approved | Product demo | Product Walkthrough | Product Backlog |
| Committed/approved | User stories | Status | Next Sprint |
| Committed/approved | Product backlog | Status | Next Sprint |

**Meeting Type 3: Sprint retrospective meeting**

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| --- | --- |
| **Date** | 1/3/2025 |
| **Time** | 9:00 AM EST |
| **Location** | Zoom Meeting |
| **Prepared By** | Sangeeta |
| **Attendees** | The development team, Product Owner, and Scrum Master |

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| **Agenda** | **What went well** | **What din't go well** | **Questions** | **Reference** |
| To discuss about previous sprint | Sprint Planning was in good shape | time log booking | Pending tasks | Azure Devops |

**Meeting Type 4: Daily Stand-up meeting**

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| **Question** | **Name/Role** | **Week1 (from 12/9/2024 to 12/20/2024)** | | | | | | |
| **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** | **Saturday** | **Sunday** |
| **What did  you do  yesterday?** | **Developer1** | PBI# 2342 | PBI# 2342 | PBI# 2342 | PBI# 2342 | PBI# 2342 |  |  |
| **Developer2** | PBI# 2345 | PBI# 2345 | PBI# 2345 | PBI# 2345 | PBI# 2345 |  |  |
| **Developer3** | PBI# 2434 | PBI# 2434 | PBI# 2434 | PBI# 2434 | PBI# 2434 |  |  |
| **What will  you do  today?** | **Developer1** | PBI# 2342 | PBI# 2342 | PBI# 2342 | PBI# 2342 | PBI# 2342 |  |  |
| **Developer2** | PBI# 2345 | PBI# 2345 | PBI# 2345 | PBI# 2345 | PBI# 2345 |  |  |
| **Developer3** | PBI# 2434 | PBI# 2434 | PBI# 2434 | PBI# 2434 | PBI# 2434 |  |  |
| **What (if any) is blocking  your progress?** | **Developer1** | Database connectivity | Database connectivity |  |  |  |  |  |
| **Developer2** | Laptop hung |  |  |  |  |  |  |
| **Developer3** |  |  |  |  |  |  |  |