

Project Status Report I

Date of Report Issue/Prepared: February 2, 2025

Report Prepared by: Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen

Employer/Organization:

Project Name:	Budget Boss	
Project Team:	Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen	
Period Reporting:		
Overall Project Health:	Start Date: Jan 07, 2025	End Date: Feb 02, 2025
	Green (Good)	

Summary

Project Status Summary

The Budget Boss application has been developing on schedule, with most backend features well underway. Our work over the past month has brought us to a point where we have been able to sufficiently develop the majority of our application's tabs at a base functionality space. There are still many features we wish to add and fine-tune that can be found in our planned activities section, but as of February 2nd, 2025 our app is still able to showcase a base level of functionality in line with the expectations of our initial demonstration within week 6. We hope to continue our progress with our application in the upcoming weeks to further improve our overall UI elements, along with adding some new backend operations, and adding in the reports tab as our next key focus points.

Accomplishments As Planned	Planned but not Accomplished
Basic navigation with tabs and drawer has been completed.	The Transaction tab allows users to choose different months to review.
Login and SignUp screens have been designed and implemented.	Integrate the overview tab with the back-end database to show dynamic data from users.
Backend integration for securely saving user data has been completed.	Create logo and splash screen
Password hashing and JWT-based authentication have been implemented for security.	Category logos for Budget summary page
The Transaction tab shows expenses and income from a specific user.	Category spent and category remaining from budget summary page

The Transaction tab shows expenses and income for a specific month.	Category spent data col in budgets table
Expenses and income are calculated and colour coded for better visualization.	Edit/Delete operations for budgets backend
Design and implement the schema logic for the Categories table.	Edit/Delete options for budget summary page
Create necessary visual components for the Categories tab.	
Integrate backend and front-end to implement customizing categories (CRUD)	
Implement secure backend routing and data fetching for categories.	
The create transactions tab that allows users to create their own transaction after login.	
The overview tab shows the transactions of different months using dummy data.	
Created budgets table schema	
Created budgets stack navigator for the Budgets tab to allow switching between the form page and the summary page	
Added backend setup for budgets tab to allow creation of new budget entries, and allow the fetching of budgets based on the month/year.	

Added frontend for budgets form (COMPLETE), and for budgets summary page (PARTIALLY COMPLETE - See Planned but not accomplished section)	
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	Planned Activities/Tasks for Next Period		
Activity/Task	Assigned To	Duration	Date
Design Edit Profile UI	Trang Nguyen	1 day	Feb 3rd, 2025
Develop backend API for profile updates	Trang Nguyen	2 days	Feb 6th, 2025
Implement Change Password functionality	Trang Nguyen	2 days	Feb 10th, 2025
Test account update/error handling	Trang Nguyen	1 day	Feb 14th, 2025
DesignFeedback Form UI	Nhan Tran	1 day	Feb 5th, 2025
Set up Formspree endpoint for submissions	Nhan Tran	1 day	Feb 10th, 2025

Test form submission and email notifications via Formspre	Nhan Tran	1 day	Feb 14, 2025
Design Contact Support UI	Trang Nguyen	1 day	Feb 17th, 2025
Design FAQ UI	Adam Simcoe	1 day	Feb 7th, 2025
Compile common FAQs for users	Adam Simcoe	2 days	Feb 13, 2025
Brainstorm logo concepts	Trang Nguyen	1 day	Feb 14, 2025
Design logo and splash screen	Trang Nguyen	5 days	Feb 22, 2025
Implement splash screen in React Native	Trang Nguyen	1 day	Feb 28, 2025
Identify all tech that needs to be replaced from planning phase to ensure support for all Budget Boss' designs	Nhan Tran Nhu Ly Adam Simcoe	1 day	Jan 31st, 2025
Create IconPicker component for Categories tab	Nhu Ly	3 days	Feb 5th, 2025
Implement Edit Categories Screen	Nhu Ly	3 days	Feb 5th, 2025

Implement default categories list for newly signed up users.	Nhu Ly	3 days	Feb 28th, 2025
Create UI components for Report Tab	Nhu Ly	2 weeks	Feb 28th, 2025
Integrate the overview with back end database	Christian Do	3 days	Feb 4th, 2025
Implement a better pie chart for the overview tab	Christian Do	3 days	Feb 7th, 2025
Design Notification Settings UI	Trang Nguyen	1 day	Feb 7th, 2025
Implement budget alerts and reminders	Nhan Tran, Adam Simcoe	3 days	Feb 21st, 2025
Test notification service	Nhy Ly, Nhan Tran	1 day	Feb 22nd, 2025
Design Income Form UI	Christian Do	1 day	Feb 21st, 2025
Develop backend API for income form	Christian Do	2 days	Feb 23rd, 2025
Store income data and update transaction list	Christian Do	2 days	Feb 28th, 2025
Finish UI of Budget Summary Page	Adam Simcoe	1 day	February 9th, 2025

Add new col in budgets table for tracking budget spending (to be used to track category spent frontend UI)	Adam Simcoe	1 day	February 9th, 2025
Update Budget form and Budget Summary with new added col	Adam Simcoe	2 days	February 16th, 2025
Add edit/delete operations to budgets backend	Adam Simcoe	3 days	February 23rd, 2025
Add edit/delete frontend UI on budgets summary page	Adam Simcoe	3 days	February 23rd, 2025
Add budget bar meter on summary page showcasing each category's amount spent vs amount remaining	Adam Simcoe	2 days	February 28th, 2025

	Milestones for Next Period	
Milestone (Objective)	Assigned To	Delivery Date
Fully functional Categories Tab	Nhu Ly	Feb 28, 2025
UI components for Report Tab	Nhu Ly	Feb 28, 2025
Create Logo and Splash Screen	Trang Nguyen	Feb 28, 2025
Implement Account Update Feature (Edit profile, change password, etc.)	Trang Nguyen	Feb 14, 2025
Develop User Submission Form for feedback and support requests	Nhan Tran	Feb 14, 2025
Design Contact Support Screen	Trang Nguyen	Feb 21, 2025
Create FAQ Section for troubleshooting and finance tips	Adam Simcoe	Feb 14, 2025
Implement Notification Settings	Nhan Tran	Feb 28, 2025
Fully updated Budgets Tab UI	Adam Simcoe	February 28th, 2025

Budgets backend fully encompasses all CRUD operations	Adam Simcoe	February 28th, 2025
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Managing Issues and Risk

Issues/Problems	Resolution Strategy	Due Date
While we were researching and learning about the tech stack we initially planned to use, we realized that it did not fully support our intended tasks.	Conduct additional research on available online resources to identify solutions that align with our current tech stack and effectively support our design requirements.	Feb 3, 2025
After diving into our outlined tech stacks, we realized that some require more time and effort to learn and master than others. While the basics of some technologies can be picked up quickly, certain stacks have more advanced	To address this, we plan to break down the learning process into smaller, more manageable parts. We'll focus on tackling one complex topic at a time, dedicating additional time for the more challenging areas, while also making sure that important deliverables are still completed on time. We'll also leverage support from	Feb 28, 2025

concepts that are more challenging to understand. Topics like optimization, performance tuning, and security can take longer to grasp, and balancing learning with other responsibilities can add extra pressure.	team members and schedule extra study sessions when needed.	
While developing our design, we realized that some of the originally planned functions, aesthetics, and buttons wouldn't work intuitively based on the overall purpose we're trying to achieve. Certain features or layouts that seemed like a good idea initially ended up being confusing or not aligned with the user experience we want to create. This led to the need for adjustments to make the interface more intuitive and user-friendly.	To resolve this, we've been holding spontaneous 5-minute meetings throughout the week to quickly address the issue and gather everyone's input on what would be the simplest, most intuitive design for the users. These short check-ins allow us to quickly share thoughts and make decisions without taking up too much time, ensuring we stay on track. By incorporating everyone's perspective, we can create a design that balances functionality and user experience while staying aligned with our overall goals.	Ongoing

Upcoming Risks	Risk Ranking (Hi, Med, Low)	Risk Impact (Hi, Med, Low)	Mitigation Strategy
Data Breach or Security Vulnerability	H	H	Conduct regular security audits, encrypt sensitive

			data, and follow security best practices to mitigate risks
Low User Engagement	H	L	Enhance user engagement through improved features, personalized content, and marketing strategies.
Changes in Financial Regulations	H	L	Continuously monitor regulatory changes and plan for timely app updates.
Development Delays	M	L	Ensure to allocate buffer time in project timelines and regularly assess team progress.
Unexpected Costs	M	M	Regularly track expenses and adjust project scope or timeline as needed.
App Store Rejection	M	H	Thoroughly review app store submission guidelines and implement them early in the development process.

Delayed Market Feedback	M	L	Collect feedback from users early and regularly, and implement a continuous improvement process.
Incompatibility with Future OS Updates	M	L	Monitor updates from Android and React Native to ensure app compatibility.
Outdated Device Compatibility	L	L	Test app on older devices to ensure compatibility and minimize issues for users with legacy hardware.

Project Status Report II

Date of Report Issue/Prepared: March 09, 2025

Report Prepared by Team members: Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen

Employer/Organization:

Project Name:	Budget Boss	
Project Team:	Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen	
Period Reporting:		
Overall Project Health	Start Date: Feb 03, 2025	End Date: Mar 09, 2025
	Green (Good) - Yellow (Warning) - Red (Bad)	

Summary

Project Status Summary

The Budget Boss application has been progressing steadily towards our expected final implementation in the coming weeks. Currently, the application's base functionality has been implemented, and progress towards adding further implementations and QoL features has begun. The majority of tabs within the application function fully with our

implemented Flask backend, and we have now begun to switch focus in order to implement more of our planned features, as well as improve on our overall design by updating previous functionality, more robust error handling, and increased user friendly features.

Accomplishments As Planned	Planned but not Accomplished
Designed Edit Profile UI	Create logo and splash screen
Developed backend API for profile updates	Design logo and splash screen
Implemented Change Password functionality	Implement splash screen in React Native
Test account update/error handling	Implement budget alerts and reminders
Design FAQ UI	Test notification service
Compile common FAQs for users	
Designed Feedback Form UI	
Set up Formspree endpoint for submissions	
Test form submission and email notifications via Formspree	
Designed Contact Support UI	

Create IconPicker Component	
Implemented Edit Categories Screen	
Added a default category list for newly registered user	
Basic Functional Categories Tab	Thorough Testing of Frontend and Backend in the Categories Tab
	Create UI components for Report Tab
Added new backend columns for tracking budget spending within the budgets tab	Implement PUT and DEL for budget entries within the backend and frontend
Updated frontend budget form to allow user entry of new budget spent	Update frontend for budget summary page to display individual budgets as drop down list from the concatenated category list
Updated frontend budget summary page to perform frontend calculations using new budget spent column	
Improved error handling with more specific error messages in the fetchUserData and fetchCategories functions of the create transaction screen.	Integrate the overview tab with the back-end database to show dynamic data from users.
Optimized the handleSubmit function by adding more checks and error messages of the create transaction screen.	Interactive Chart that allow users to tap on segments to drill down into specific categories
Added search filtering in the dropdown to enhance the user experience when there	

are many categories of the create transaction screen.	
Complete CRUD operations for Transactions.	Edge case testing to ensure all operations are working as intended.

Upcoming Objectives for **Mar 08, 2025 to Mar 27, 2025**

Planned Activities/Tasks for Next Period			
Activity/Task	Assigned To <name/s>	Duration <days>	Date
Brainstorm logo concepts	Trang Nguyen	1 day	March 11, 2025
Design logo and splash screen	Trang Nguyen	5 days	March 12, 2025
Implement splash screen in React Native	Trang Nguyen	1 day	March 16, 2025
Implement budget alerts and reminders	Nhan Tran, Adam Simcoe, Trang Nguyen	3 days	March 17, 2025
Test notification service	Nhy Ly, Nhan Tran	1 day	March 23, 2025

Thorough Testing of Frontend and Backend in the Categories Tab	Nhu Ly	7 days	Mar 8, 2025
Create UI components for Report Tab	Nhu Ly	7 days	Mar 15, 2025
Implement PUT and DEL backend for budgets tab	Adam Simcoe	7 days	Sunday March 16th
Implement frontend functionality for new PUT and DEL in backend	Adam Simcoe	7 days	Sunday March 23rd
Update Budget Summary Page to have option to show list of all concatenated budgets within the category	Adam Simcoe	7 days	Thursday March 27th
Integrate the overview tab with the back-end database to show dynamic data from users.	Christian Do	7 Days	March 16th
Interactive Chart that allow users to tap on segments to drill down into specific categories	Christian Do	7 Days	March 23rd

Implement remaining CRUD operations for transactions	Nhan Tran	3 Days	March 12, 2025
Implement Report Tab with UI components	Nhan Tran	7 Days	March 22, 2025

	Milestones for Next Period	
Milestone (Objective)	Assigned To	Delivery Date
Fully functional Categories Tab	Nhu Ly	Mar 27, 2025
UI components for Report Tab	Nhu Ly, Nhan Tran	Mar 27, 2025
Fully functional Budget Form and Budget Summary page, with all planned implementations	Adam Simcoe	Thursday March 27th
Overview tab to show dynamic data from users and interactive pie chart	Christian Do	Mar 23, 2025
Complete Transaction and normalize all data types with other components of project	Nhan Tran	Mar 17, 2025

Create Logo and Splash Screen	Trang Nguyen	March 12, 2025
Implement Notification Settings	Adam Simcoe, Nhan Tran, Trang Nguyen	March 27, 2025

Managing Issues and Risk (for current reporting period and next period)

Issues/Problems	Resolution Strategy	Due Date
As we continue developing the app, we occasionally encounter aesthetic issues where certain design elements don't align well with the app's overall look. These issues can affect the user experience and make the app feel less polished.	To address these issues, we have been holding quick check-ins to talk through the design issues and discuss the concerns before moving forward. These brief meetings help us stay on track and make necessary adjustments to align the design with the overall vision.	Ongoing
We are still in the process of researching and learning the best way to implement the notification system. The tech stack we plan to use has some complexities, and we are figuring out the best approach to ensure that the	We are holding meetings to discuss what we have learned so far, share findings, and make decisions on how to implement the notification system. These meetings help us stay on track while we continue to research and learn, ensuring we choose the most effective solution for the app.	Ongoing

notifications are easy for users to manage.		
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NOTE: Attach additional sheets if insufficient space available

