

# Week 1 Progress Report

(9/7/25-9/14/25)

Team: Pocket Protectors

- Anna Dinius, Jeff Perdue, Cody King, Dillon Carpenter

# Progress Summary

- Set team rules
- Chose project & AI option
- Decided on features
- Defined requirements as user stories
- Set milestones

## Team Rules (1/2)

- Be on time to meetings
- Follow good SWE practices (e.g. KISS - Keep It Stupid and Simple)
- Start early and finish early
- No surprises - have good, consistent communication
  - Respond to all team communication ASAP (max. 24 hours)

## Team Rules (2/2)

- Be professional - no emotions
- Commit code to GitHub regularly
- No force pushing into repo
- Ask for help and feedback when needed

## Project Chosen

- The expense/budgeting app

## AI Option

- Assisted (#2)

# Sprint 1 Features

1. Dillon - Ability to add scheduled and recurring payments
2. Jeff - Categories (types of transactions)
3. Cody - User profiles

# Sprint 1 Requirements (1/3)

Dillon

1. Ability to add scheduled and recurring payments
  - Create, edit, & delete scheduled & recurring payments
  - Automatically add scheduled & recurring payments to transaction list

# Sprint 1 Requirements (2/3)

Jeff

## 2. Categories (types of transactions)

- Assign categories to a transaction (e.g., Food, Rent, Clothes)
- Display category next to transaction
- Change the category assigned to a transaction
- Create, edit, and delete categories



# Sprint 1 Requirements (3/3)

Cody

## 3. User profiles

- Create and manage a profile
- Each user's transactions and settings are kept separate
- Log in & log out of profile

# Milestones (1/3)

Dillon

- Week 2: Specifying frequency, start date, & end date for a scheduled/recurring payment & scheduled/recurring payment modification
- Week 3: Complete the functionality begun in Week 2
- Week 4: Automatically logging & displaying scheduled/recurring payments
- Week 5: Complete the functionality begun in Week 4

# Milestones (2/3)

Jeff

- Week 2: `Category` model design, & update `Transaction` model
- Week 3: `Category` model implementation, default categories, category dropdown, & category association with transactions
- Week 4: category display in `TransactionList`, category creation, & tests
- Week 5: category modification, category deletion, UI refinement, & code cleanup

## Milestones (3/3)

Cody

- Week 2: database setup & implementation, transaction & user profile model designs
- Week 3: user profile creation & editing
- Week 4: profile summary & tests
- Week 5: profile deletion, bug fixing, & polishing