*Stock Forecaster*

User Interface specification

Version 1.0

02/01/2019

VERSION HISTORY

|  |  |  |  |  |  |
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# Introduction

## Purpose of The USER INTERFACE SPECIFICATION Document

The User Interface Specification documents and tracks the necessary screens for the user to pick and choose the different options as inputs to the backend model or algorithm for generating a stock or portfolio value. Its intended audience is the general investor or portfolio manager.

# General Overview and Design Guidelines/Approach

This section describes the principles and strategies to be used as guidelines when designing and implementing the user interface.

## Assumptions / Constraints / Standards

It is assumed the full web and mobile versions use the same model or algorithm in the backend. The mobile version will be limited to a certain numbers of options per stock that can fit in each screen compared to the full web version. The look and feel should be similar in the full web and mobile version.

# User INTERFACE Design

This section outlines the user interface screens along with the different options.

The user interface screens (with the exception of the Login Screen) will all have a navigation bar on top with an icon along with the app name. When the icon is pressed, it will have a pop-up menu displaying the following texts: Home, About, Logout.

When the “Home” is pressed, it will navigate to the Home Screen. When the “About” text is pressed, it will navigate to the About Screen. When the “Logout” text is pressed, it will log the user out and navigate back to the Login Screen.

## LOGIN SCREEN

This screen will prompt the user for their credential to login to the system. It will prompt for the user name and password. Once they click on the “Sign On” button, it will call the backend to validate the credential entered.

The prototype will bypass this for proof of concept.

## HOME SCREEN

This screen will give the user the options to choose the following buttons: New Portfolio, Load Portfolio, Delete Portfolio, and Forecast Stock.

When the “New Portfolio” button is pressed, it will go to the New Portfolio Screen. When the “Load Portfolio” button is pressed, it will go to the Load Portfolio Screen. When the “Delete Portfolio” button is pressed, it will go to the Delete Portfolio Screen. When the "Forecast Stock” button is pressed, it will go to the Stock Screen.

## NEW PORTFOLIO SCREEN

This screen will allow the user to enter a portfolio name and add stocks to the new portfolio. The user can enter a stock ticker or search for a stock ticker. Once the user press the “Add” button, it will be added to the new portfolio. When the “Done” button is pressed, it will navigate to the Portfolio Screen.

The prototype will allow the user to enter a stock ticker without the search feature.

## LOAD PORTFOLIO SCREEN

This screen will open a list of the saved portfolios from the current user. The user can highlight a single portfolio name. Once the “Load” button is pressed, it will load the selected portfolio and navigate to the Portfolio Screen.

## DELETE PORTFOLIO SCREEN

This screen will open a list of the saved portfolios from the current user. The user can highlight a single or multiple portfolios. Once the “Delete” button is pressed, it will pop-up a message asking the user to confirm the delete action. Once the portfolio or portfolios are deleted, it will display a message confirmation of the deletion. The pop-up message will contain an “OK” button. Once the “OK” button is pressed, it will close the message and go back to the Delete Portfolio Screen.

## PORTFOLIO SCREEN

This screen will load the portfolio of stocks. It will display the portfolio name and the list of stocks along with its stock ticker, company name, and the following options for each stock: Volume, Market Cap, Beta, PE Ratio, EPS. The user can check on one or multiple options. Once the “Forecast” button is pressed, it will call the Forecast method to calculate and display the value of each stock and the optimal allocation percentage of each stock for the portfolio.

The prototype does not require to show the company name and can only limit to the options listed. It will also mock up a value for each stock and percent of allocation of each stock for the portfolio.

## STOCK SCREEN

This screen will display the stock ticker, company name, and the following options for the stock: Volume, Market Cap, Beta, PE Ratio, EPS. The user can check on one or multiple options. Once the “Forecast” button is pressed, it will call the Forecast method to calculate and display the value of the stock.

The prototype does not require to show the company name and can only limit to the options listed. It will also mock up a value for the stock.

## ABOUT SCREEN

This screen will show the company, version, and app detail information. When the “Done” button is pressed, it will close this screen and return to the last screen.

Appendix A: References

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name and Version** | **Description** | **Location** |
| *<Document Name and Version Number>* | *[Provide description of the document]* | *<URL or Network path where document is located>* |

Appendix B: Key Terms

The following table provides definitions for terms relevant to this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |