EECS 2311 Group 2
Iteration 2: Further Planning and Implementation

FINANCIAL TRACKER VISION STATEMENT

NAME OF SOFTWARE: PENNY PLANNER

Team Members:
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Corinthe

Revisions from Itr0 to Itr1:

1. Our stories were too dependent on each other, breaking the mostly independent structure of the project. In plan 1, everybody was assigned a mostly independent part(eg. Login page, Investment page,...).

2. Our plan was also made more defined, by having precise user stories and an understanding of how they'll be interconnected. Compared to previously where the general view itself was vague, for example we had in mind to create the whole investment page with all of its functionalities in the first iteration.

3. In iteration 0 our plan was to each work on a substantial user story and finish it for deliverable 1, but after reconsidering the project guidelines, we have divided most of the big user stories so as our workload is of manageable size for each team member, for example the login and sign up page were tied up to one person for deliverable 1, it has now been broken into two, the login page and the registration page.

Revisions from Itr1 to Itr2:

1. Integration of a Accounts.db, keeps track of a user's credentials, expenses and incomes

2. Completion of the GUI for every sub-story for delivery 1, including:
   - The Login page
   - The Expense/income table
   - Navigation buttons
   - Summary page
   - Savings page
   - Investment Page
   - Loan page

3. Updated the UML class diagram to cover what has been done

4. User stories more defined

Vision Statement

Project Scope

The overall aim of our Finance Tracking application is to create a user-friendly digital platform which enables individuals to monitor and manage personal finances, including savings, expenses and budgeting.

What is the project?

A finance tracking application is essentially a platform where users can input personal expenses and the program will organize the finances based on the input given. The main goal of the application is to aid our users in setting and achieving budgeting goals while simultaneously improving overall financial literacy. The application is designed in such a way that user expenses are separated in a designated ‘expense table’. The application ideally will take this information and determine how much the user is saving on a monthly basis given his/her income. The application is also designed to help the user see his/her investment progress.

Users

The potential users for a finance tracking application can encompass a wide range of individuals however the one designed by our team is mainly targeted towards young adults seeking to enhance their personal financial management. This group of people can be students for example who deal with day-to-day expenses and are in need of an application to help sort their finances out. Essentially the app is designed for students who desire a more organized and insightful approach to managing their personal finances, regardless of financial literacy level. The application not only helps organize and budget your expenses but is also a crucial tool for keeping track of investment progress. As students who heavily struggle with time management, this is a very imperative platform.

Why is the project valuable?

Our platform will enable users to effortlessly create and personalize their accounts and track income, expenses, investments, and savings with ease, gaining a view of their financial information in real time.

Success criteria to indicate the goals of project

These include increased savings rates, reduced debt burdens, improved investment portfolios, and enhanced financial literacy among users. Our goal is to empower our users to achieve financial stability through smart financial management practices facilitated by our application.

Summary

In summary, our vision for this project is to empower individuals to achieve financial well-being by providing a comprehensive and user-centric financial tracking application.

Customer meeting summary video

https://youtu.be/5GNZup-LGb4

Big User Stories

Login and Sign Up Page

As a new user,
I want to be able to create and own an account on the platform
so that I can personalize my experience and access exclusive features.

Financial Analysis

As a new user,
I want to be able to see my investments, savings and a financial summary page

User Interaction

As a new user,
I want to be able to navigate through the platform to view my income, expenses and other information

Iteration 1 Detailed User Stories

User story checklist ITR1:

- [x] Login
- [x] Display Expense
- [ ] Display Income
- [x] Display Investment
- [x] Determine Savings
- [x] Monthly Summary page
- [x] Display Buttons
- [x] Display Loan Calculator

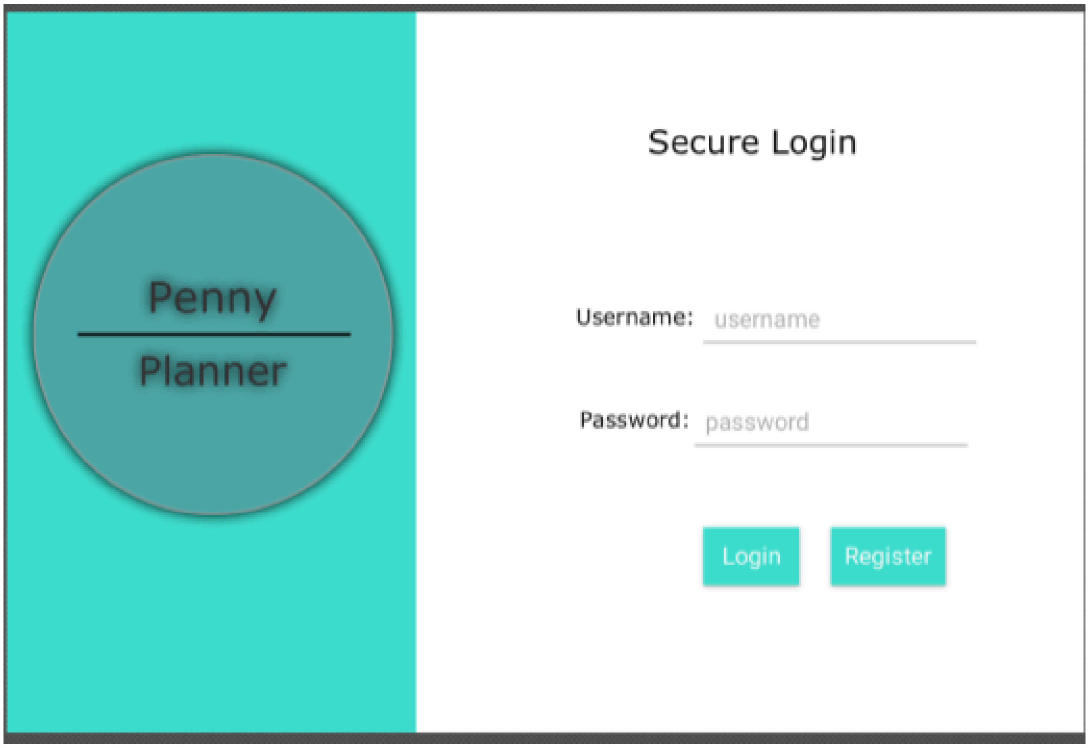
Ahmed

Login

User Story for Login:
As a registered user,
I want to be able to log into my account on the platform, so that I can personalize my experience and access exclusive features available only to members.

Priority: High

Cost: 4 days



Display Income

As a new user,
I want to be able to be able to input and keep track of my monthly income in the application

Priority: High

Cost: 2 Days

Name	Actual Cost	Projected Cost	Difference
Bills	0.0	0.0	0.0
Transportation	0.0	0.0	0.0
Insurance	0.0	0.0	0.0
Food	0.0	0.0	0.0
Self-Care	0.0	0.0	0.0
Entertainment	0.0	0.0	0.0
Loans	0.0	0.0	0.0
Taxes	0.0	0.0	0.0
Investments	0.0	0.0	0.0
Gifts	0.0	0.0	0.0
Charity	0.0	0.0	0.0
Donations	0.0	0.0	0.0

Corinthe

Display Expenses

As a new user,
I want to be able to be able to input and keep track of my monthly expenses in the application

Priority: High

Cost: 4 Days

Name	Actual Cost	Projected Cost	Difference
Bills	0.0	0.0	0.0
Transportation	0.0	0.0	0.0
Insurance	0.0	0.0	0.0
Food	0.0	0.0	0.0
Self-Care	0.0	0.0	0.0
Entertainment	0.0	0.0	0.0
Loans	0.0	0.0	0.0
Taxes	0.0	0.0	0.0
Investments	0.0	0.0	0.0
Gifts	0.0	0.0	0.0
Charity	0.0	0.0	0.0
Donations	0.0	0.0	0.0

Oubai

Display Investments

As a new user,
I want to be able to check on my investment portfolio, see what I own and my investing gains/losses

Priority: Low

Cost: 3 Days

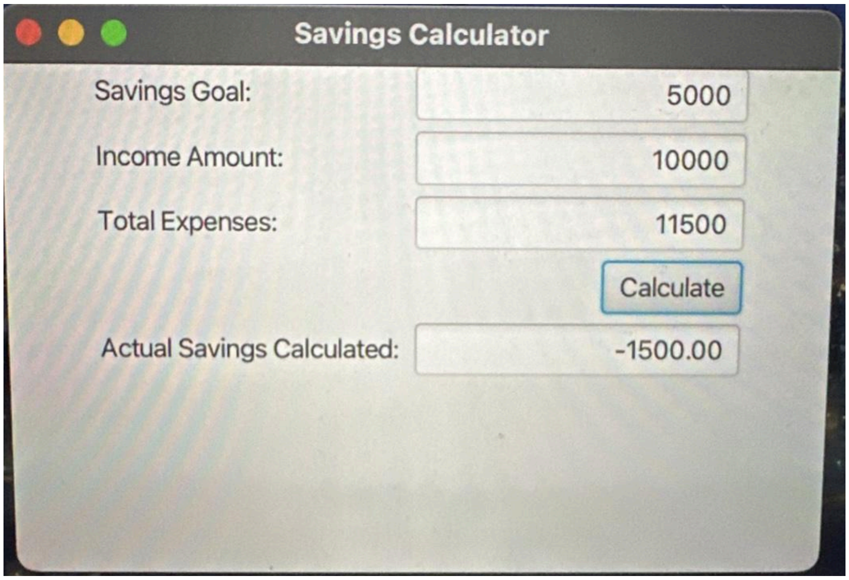
Kennie

Determine Savings

As a new user,
I want to be able to calculate my savings
using my Income and Expenses

Priority: Medium

Cost: 3 days



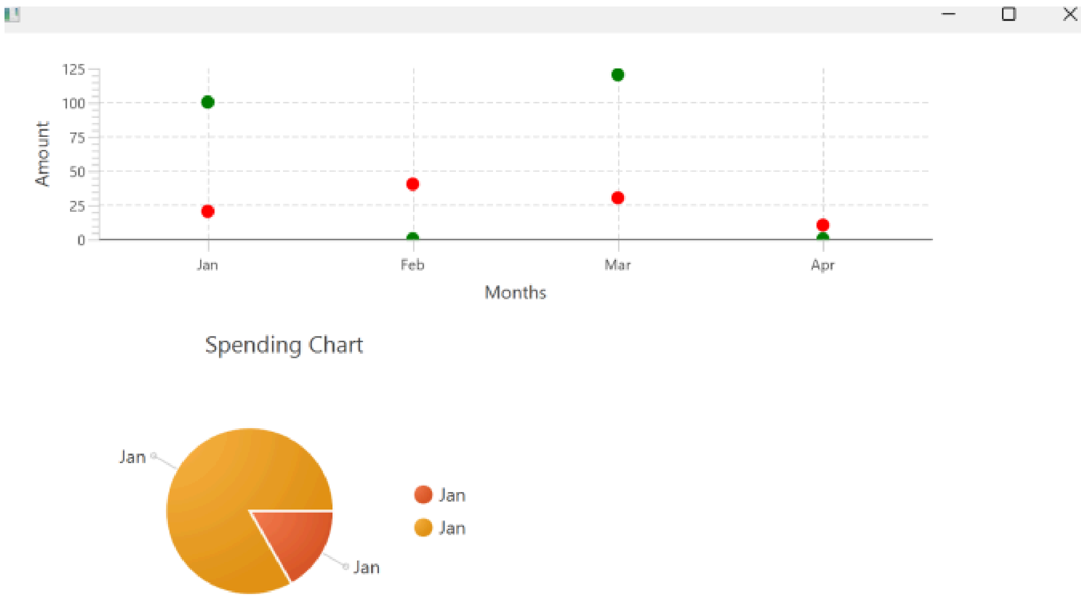
Farzin

Monthly Summary Page

As a new user,
I want to be able to see a visual summary of my expenses and income for different months so that I can have a small understanding of my finances.

Priority: Medium

Cost: 5 Days



Nabeela

Display Navigation Buttons

As a new user,
I want to be able to use buttons for efficient navigation throughout different pages

Priority: High

Cost: 2 days

Sarimah

Display Loan Calculator

As a user,
I want to be able to view my loans and see how much I need to save in order to pay off my loans within a certain time period.

Priority: Low | Cost: 2 days

Iteration 2 Detailed User Stories

User story checklist ITR2:

- [x] Yearly summary page
- [x] Display savings
- [x] Display loan calculator

Farzin

Yearly Summary Page

As a new user,
I want to be able to see a visual summary of my expenses and income for the year so that I can have a understanding of my finances.

Priority: Medium | Cost: 3 Days

Kennie (done)

Display my Savings

As a new user,
I want to be able to see a visual summary of my monthly savings on a graph

Priority: Medium Cost: 4 days

Sarimah (Done)

Display Loan Calculator

As a user,
I want to be able to view my loans and see how much I have paid off and how much is left to be paid off.

Priority: Low Cost: 2 days

Iteration 3 Detailed User Stories:

User story checklist ITR3:

- [ ] Flexible summary page
- [ ] Income table
- [ ] Identify top spending areas

Farzin

Flexible Summary Page

As a new user,
I want to be able to see a visual summary of my expenses and income for any time period that I choose so that I can have a large understanding of my finances.

Priority: Medium

Cost: 4 Days

Kennie

Identify Top Spending Areas

As a new user,
I want to be able to display the categories(eg, food, entertainment, transportation) where I'm spending the most

Priority: Medium

Cost: 5 days