**Project Report 1**

**University of Huddersfield**

**Friday 1st March**

Author Note

Please take out the acknowledgements and other unnecessary sections which do not contribute to the specification out of the word count, following the guidance rubric.

**Project Report | Abstract**

**University of Huddersfield**

**PLANABLE**

**01/01/2024**

PROJECT REPORT FOR

PLANABLE VOLUME I

The environment for students, such as financing and money management can be very harsh, as typically everything can be very expensive, with the increasing financial problems in the UK, and lack of employment for students, means many students struggle to use money wisely, as they do not understand the importance of saving and typically lose track of their spending. Keeping spending, and finances can be a challenge for many students, with many apps to choose from, it can get quite daunting.

Planable streamlines and simplifies this process as a free-to-download application, on android and windows, aiming to provide students with a simple, peace of mind way to track their finances and their spending habits to give students infographics and information regarding their spending, which can promote better habits, and show students what they spend their money on the most, and have an overview of student finances, so they can better plan for the future, with tips and infographics on how to save money. However, it is open to all demographics, and not limited to only students. There exist much more key features of Planable.

Some of these key features include, but are not limited to:

* The application will contain important features such as allowing students to budget over an allocated time period to gain insight into their spending and savings habits.
* Include a breakdown on a monthly or weekly recommended spending limit, this can benefit busy students who are new to the solo living lifestyle.
* The app will feature a login page that will allow students to log in with their university or personal email and with a newly created password.
* Planable will provide new and updated information on how to budget and keep up with all the new apps such as Uni-Days and Student-Beans.
* Planable will also allow the users to enter what they have spent and where they have spent it I.e., food, leisure or other.
* The application will provide users with the capability to keep an eye on their finance agreements such as pay in three or monthly installments allowing it to be added to the budgeting calculator.

Through leveraging these features, students can enhance and better manage their spending habits and spending practices, saving students a lot of trouble and money in the present and future. It can foster a lot more of an easier, streamlined experience for those living on campus or at home.

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# 1 – Project Conceptualization

As the author, and many other members of the team are students at university, finances and budgeting is not a new concept, and the application was the solution to a problem many like-minded students face, being a streamlined way of budgeting and finance management. The author also has compulsive tendencies, especially when having to choose appropriate applications and keeping everything organized, and having an app for this is a great way to solve this problem. The idea was to keep everything in one place organized and tailored towards students.

The conceptualization process involved generating many ideas within a short period of time, and identifying its complexity and suitability, with the team and narrowing down to a specific project, from type of software, down to the development framework to be used and then down to the application theme. The general ideas were developed after the author suggested we all share common interests and passions to try to solve a problem related to a common interest we all share, in which the team agreed on the app, and it was a process of listing down ideas for everything including the logo, name, app design, until it was definitive, in which the team roles were assembled, and then research & development could commence. This was under the condition that it seemed suitable to produce regarding competitor analysis, in which when researching, it seemed like a good opportunity to introduce the application into the market as the competition wasn’t as narrow as our application, and they rather targeted a much broader audience. However, competition was not as important to our team and rather creating product offerings separate from competition was the main goal and scope of the project, targeting a much narrower audience.

# 2 – Project Management

Project management for the project was important for tracking the general scope and progress of the project, rather than overcomplicating project management, it was done as a simple task and deadline tracking system, allocated as ‘cards’ in an application done through Trello which was tracked and updated frequently by the author and shared with the rest of the team to effectively track the project, tasks and deadlines. These tasks and deadlines were simple and included aspects such as outlining all the academic project deadlines, and custom deadlines regarding what and when specific documents are to be finished and completed. This will be done in the same fashion for the software development, tracking what aspects of the software are to be completed and when.

This and effective communication with the team were the most effective project management strategies, as it can become quite daunting using many different software tools and effectively tracking everything. The benefit of Trello includes seamless connectivity between the software and my university account using the Microsoft ecosystem, such as through emails, and being able to allocate tasks and forward tasks for other team members made it a great tool to use for the project. This Is in line with our development style, project management being suited more towards this strategy. The development style is the Agile technique which employs flexibility, this works through defining an iteration, designing it, developing it, testing it and if it works correctly, then release it, if not, incorporate changes. This style is very dependent on communication and project management and relies heavily on this intuition.

# 3 – Project Modelling

A diagram of a software process

Description automatically generated

***Figure 1.*** *UML flowchart provides flow information of the application.*

A screenshot of a diagram

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***Figure 2.*** *UML use case diagram presenting the users interaction with the application.*

# 4 – Project Communication

Throughout the project at the beginning, an important factor was learning the behavior and understanding the rest of the team, as it was assigned randomly. This involved learning the interests as mentioned in *Section 1*. We had allocated group roles for each of the 5 members depending on skill level and made sure everyone had a role to play regardless of what they are capable of. We had assigned the following roles:

* Programmers – Specialized in Programming the app Itself.
* Researcher – Researching for the Project such as competitors.
* Designer – Designing the Visual aspects of the Project and material.
* Leader – Overseeing the project and preparing necessary documents and tools for the project.

For general communication with the team, we had researched multiple tools and apps for effective communication, and although we had used Trello, direct communication and meetings were very important. For this we opted for tools such as slack and discord which allowed for a smooth experience. Discord was perfect as everybody in the team had familiarity with the platform. This was the main online, direct communication method, consisting also of meetings, although this was ruled out by the author as very frequent meetings proved ineffective, and rather was reserved for much more important ones, as general academic meetings in academic classes were done frequently as required. As mentioned before in *Section 2*¸ our project requires strong communication to allow the agile development strategy to be effective. All the documents were shared through university accounts, as mentioned with Trello, everything is seamless, and the Microsoft ecosystem allows for real-time editing of documents which was done frequently.

However, communication was not limited to team collaboration and communication but proved to be much broader, such as communication with stakeholders, which had high importance to understanding the target market and the customer needs and wants of the application. This was done through members’ contacts who may be interested in the application and provide valuable feedback. Identifying potential customers wasn’t too much of a difficult task as it involved simply contacting other students and friends/relations.

# 5 – Verdict

Planable is an excellent application and approach to student budgeting and finance management and has potential to be a great app as there is a clear market gap in a specific, narrow audience. Budgeting and finance management should not be difficult for students as it can be a very stressful and complex topic for some, but it doesn’t have to be, and it is a skill in and itself for students. This is why Planable is very tailored towards students, and as it is preliminary development, we hope to introduce many features which extend the experience even more, such as top tips, artificial intelligence, automatic student finance management, interaction between banks and much more. Much more to be described and explored in future reports and documents, as this is preliminary.

# Bibliography

# Appendices

## 7.1 - Meeting Minutes

Meeting Minutes have been recorded for the project, and meetings have been conducted although in *Section 4,* this was mentioned that the meeting minutes have been recorded, however later on it was seemed to be a largely inefficient strategy, as our meetings were done very frequently in academic classes, and rather was reserved for much more important updates.

***January 15th***

*The meeting was received very well. This was the first meeting minutes, as we have been introduced to the group and established all our team, learnt more about each, and broke the ice. There wasn’t much to discuss considering it was the first meeting, but we were introduced to the project specification, assigned to our group, and briefed through the project. We immediately begun discussing ideas, what tools we will use, and it was very surprising as we had gotten a lot done in the time we were provided. All our team was present, apart from Shaun joining in a little bit later, but there wasn’t necessarily any hurdles or obstacles. We had generated ideas first of all and brainstormed an idea for creating a student finance planner closer to the end. We had assigned each other roles, considering I was already working on my own startup, I had been assigned with Leader, and other roles being spread to everyone else such like Programmer, Designer and Researcher. It was very streamlined and done very efficiently. Overall, the team is very good, and well organised, we immediately got everything straight, and jumped straight into development.*

***January 20th***

*This meeting was one-off, as it was a quick meeting setup on Saturday to explore the concept of having online meetings with the team, and unfortunately there wasn’t much engagement, but it is hard to blame the team for this, as the meeting was at a very obscure time. 1PM on a Saturday, was when the meeting was called, and rather explored the future of the project and our current ideas and issues with the project. It was once again received well.*

***January 22nd***

*We had another meeting which was received a little bit more poorly as it was slightly draining to have many meetings for such a simple task or project, and we had more meetings than tasks being developed which made the meetings very short. I had decided to drop out of the regular meetings and only publish meetings when it was most necessary. This meeting was the same as the last and although academic requirements involved hosting regular meetings, it wasn’t efficient and harmed productivity. Much more spaced-out meetings had much more to explain and talk about and had much more productive feedback.*

## 7.2 – Poster (includes research)

A screenshot of a website

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Here is the poster that was created by the group, this poster shows the market research including competitor analysis.