RMK ENGINEERING COLLEGE

(An Autonomous Institution)

R.S.M. Nagar, Kavaraipettai-601 206, Gummidipoondi Taluk, Thiruvallur District.

PROJECT

PERSONAL EXPENSE TRACKER

DONE BY

TEAM ID: PNT2022TMID16287

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1. INTRODUCTION

a.Project Overview

In this project we propose an application known as “Income and Expense Tracker” which is helpful to manage out income and expense as an daily or periodically or else whenever we want to remind .

It also act as an indicator or reminder example in the fastest world which we can’t able to remember what are the things we have to do for the end of month and what are the payments we have to pay for the particular month.

Due to some conflict or some other stress we forget what the income or where the money has to come from or what the payments we have to pay.

b. Purpose

When you track your spending, **you know where your money goes and you can ensure that your money is used wisely**. Tracking your

expenditures also allows you to understand why you're in debt and how you got there.

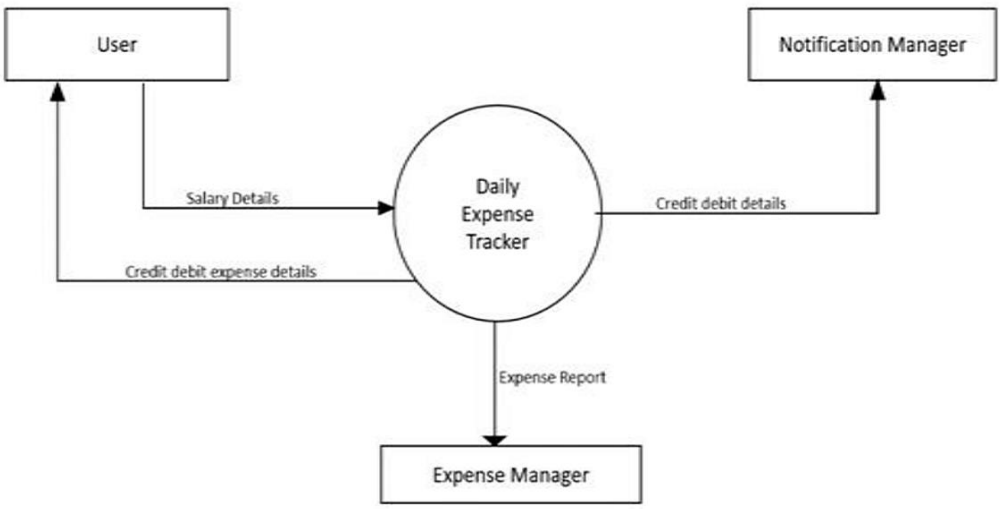
This will then help you design a befitting strategy of getting out of debt.

2. LITERATURE SURVEY

a. Existing problem

When a gets their salary, they can add that to the daily expense manager. Then after adding their salary details, the user can expense manager store all the details. If the user wants all the credit and debit details, they can get it through the Expense Tracker.

The notification Manager also reminds us about credit and debit points after updating the salary.

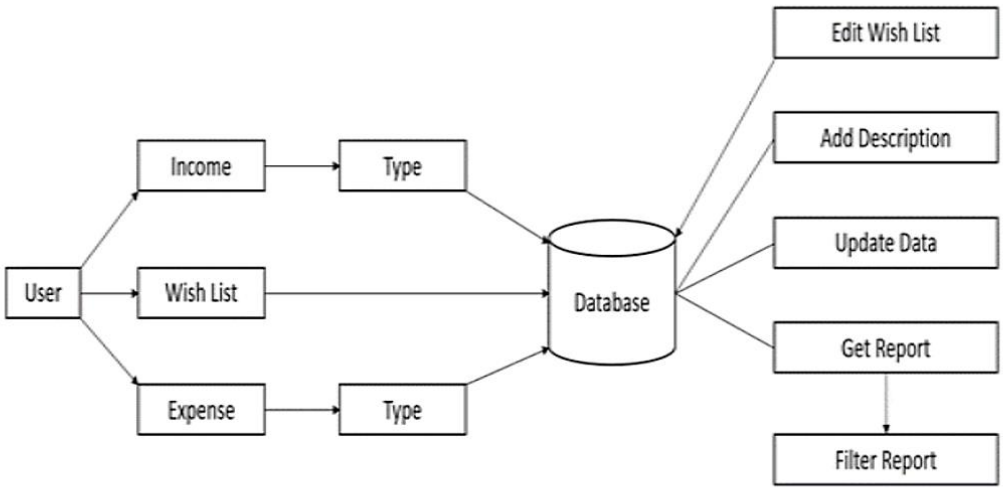


In this proposed System,

Users are provided with three data entry options: Income, expenses and Wish List. If you select income or payment, you will be supplied with its types and sub types.

For the wish list, only items can be inserted. This information would be saved into the database by their particular classification. The saved data can later be changed if the user needs to do as such.

Altering here means adding descriptions, changing wish lists, updating data etc. Users can also view the result. They can also filter to see the required content only.



b. References

[1] Y. Anitha, R. Ranjini, S. Gomathi, “Easy App for Expenses Manager Using Android”, International Journals of Computer Techniques, Volume: 3 Issue: 2, ISSN: 2394-2231 (MarchApril 2016).

[2] N. ZahiraJahan MCA., M. Phil, K. I. Vinodhini, “Personalized Expense Managing Assistant Using Android", International Journals of Computer Techniques (IJCT), Volume: 3 Issue: 2, ISSN: 2394-2231 (March-April 2016).

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The Analysis of Directional Time Series: Applications to Wind Speed and Direction, set. Lecture Notes in Statistics. Berlin, Germany: Sp ringer, 1989, vol. 61.

[4] Expense Tracker ATIYA KAZI1, PRAPHULLA S. KHERADE2, RAJ S. VILANKAR3,PARAG M. SAWANT 4.1 Professor, Department of Information Technology, Finale Academy of Management and Technology, Ratnagiri, Maharashtra, India. 2, 3, 4 Department of Information Technology, Finale Academy of Management and Technology, Ratnagiri, Maharashtra, India

[5] Expense Tracker : A Smart Approach to Track Everyday Expense Hrithik Gupta school of computer science and engineering(Galgotias University) Utter Pradesh, India nk1172947@gma il.com Ms J.Angelin Bless y school of computer science and engineering(Galgotias University) Greater Adenoid, Uttar Pradesh, India j.angelin@galgotiasuniversity.edu.inR. E. Sorace, V. S.Reinhardt, and S. A. Vaughn, "High-speed digital-to-RF converter," U.S. Patent 5 668 842, Sept. 16, 1997.

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Problem Statement Definition

A Personal Expense Tracker is a kind of digital diary that helps keep an eye on our money-related transitions. It provides all financial activities report daily, weekly, monthly and yearly.

Users get notifications to record expenses and incomes that are helpful to the tracking system of the application. The user interface of the Personal Expense Tracker is straightforward and attractive, so it is easy to understand and the best way to record our financial data.

All the financial decisions and activities you make cannot keep track of. This app makes your life easier by helping you to manage your finances efficiently.

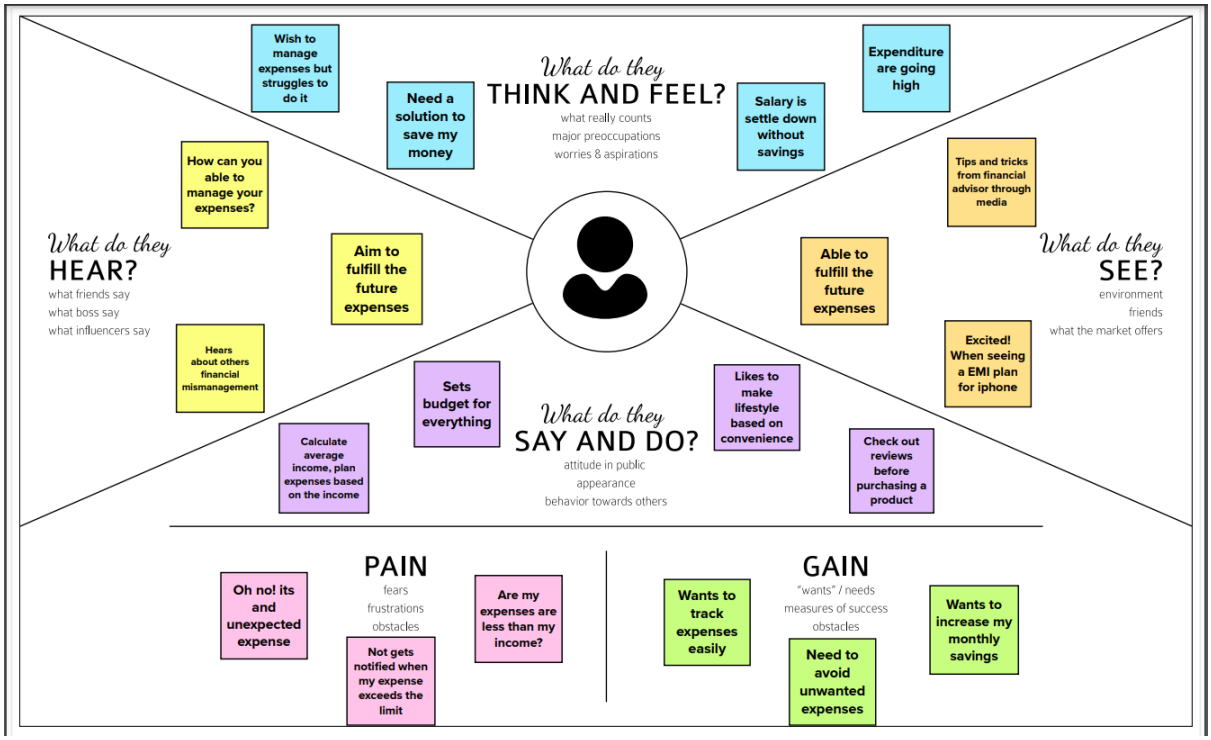
A personal finance app will help you with budgeting and accounting and give you helpful insights about financial management.

3. IDEATION & PROPOSED SOLUTION

a. Empathy Map Canvas

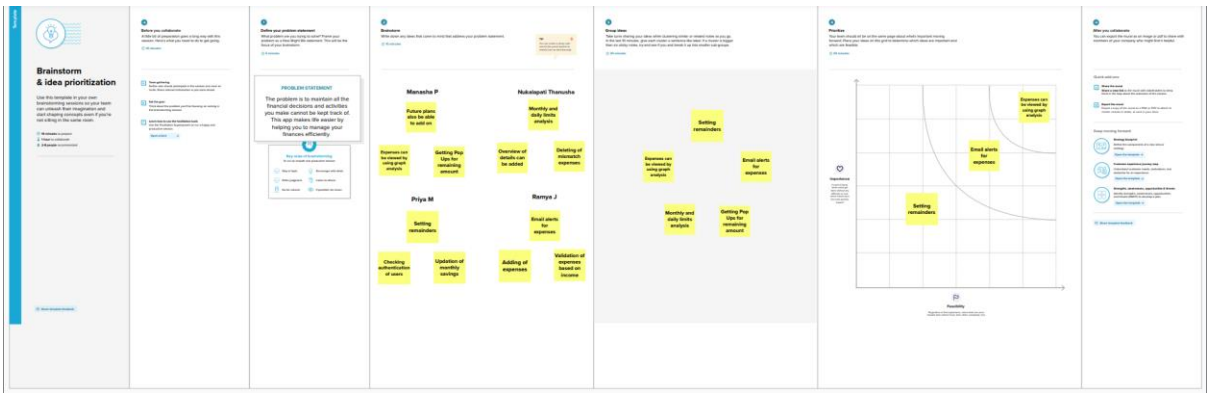
An empathy map is used to gain deeper insights on the customer's interaction with the system. It gives an idea on what the user feels and experiences while using the system, what fears the user has respective to the system, etc.

It also specifies how supportive the system environment is and what the users are likely to hear from the people around them regarding the usage of the system.



b. Ideation & Brainstorming

Ideation and Brainstorming are performed to generate ideas and solutions. Brainstorming is a group activity unlike ideation.



c. Proposed Solution

Users are provided with three data entry options: Income, expenses and Wish List. If you select income or payment, you will be supplied with its types and sub types.

For the wish list, only items can be inserted. This information would be saved into the database by their particular classification.

The saved data can later be changed if the user needs to do as such. Altering here means adding descriptions, changing wish lists, updating data etc.

Users can also view the result. They can also filter to see the required content only.

Project Design Phase-I
Proposed Solution

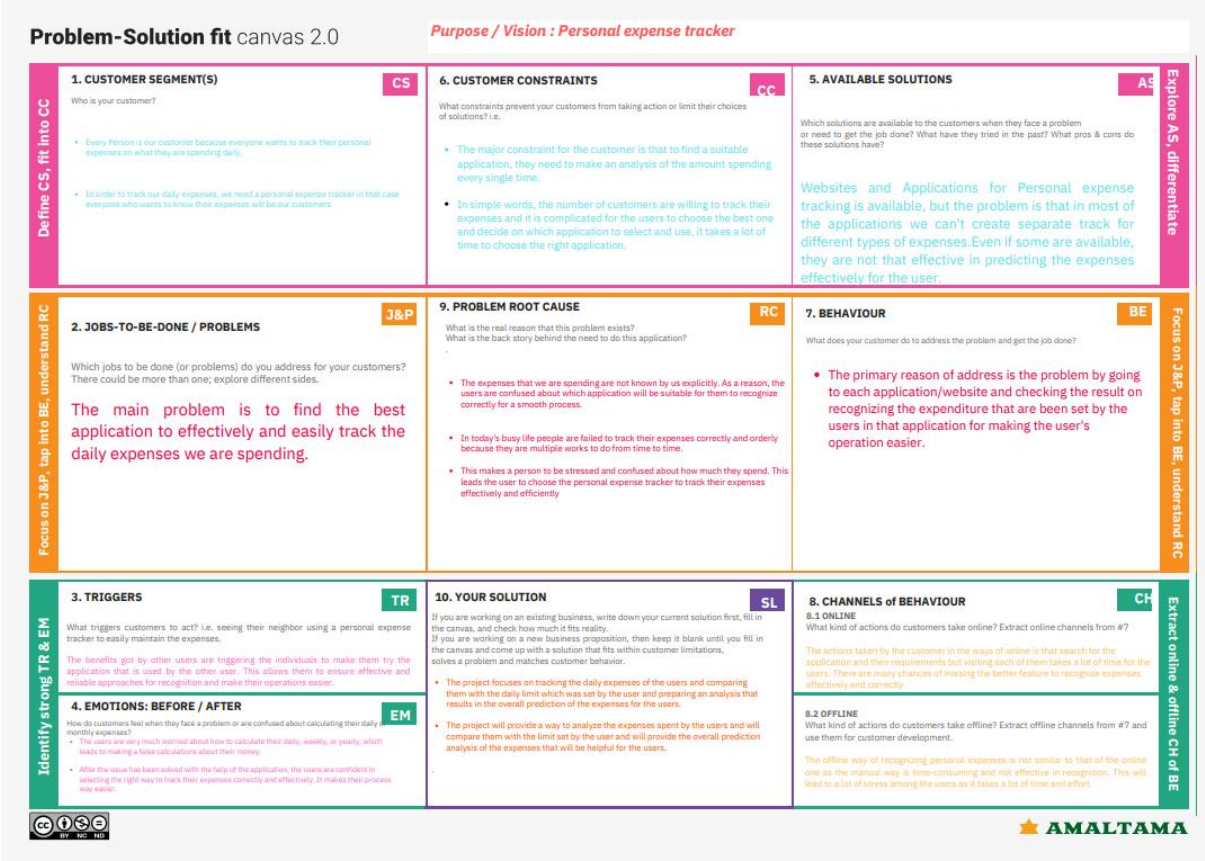
Date	05 October 2022
Team ID	PNT2022TMID16287
Project Name	Personal Expense Tracker Application
Maximum Marks	2 Marks

Proposed Solution:

SL. No.	Parameter	Description
1.	Problem Statement (Problem to be solved)	➢ People now a days find difficult to manage their expenses.Also, they are not aware of their expenditure. ➢ People fail to manage their finances efficiently like they are unaware of their lavishness.
2.	Idea / Solution description	➢ The project will provide a way to analyse the expenses of a person and will help in budgeting and accounting.In addition to that it will also provide the helpful insights about money management.
3.	Novelty / Uniqueness	➢ The expenses of a person will be collected and provide money management suggestions based on his/her expenses. ➢ Also, notifications will be sent to the person via SMS and mail if he has reached the set limit.
4.	Social Impact / Customer Satisfaction	➢ The impact will be that the person will be able to manage his/her finance efficiently. ➢ The suggestions provided for the efficient budgeting will be helpful to cut down the unnecessary financing.
5.	Business Model (Revenue Model)	See below
6.	Scalability of the Solution	➢ The project will be having the Python Flask for the development of the backend, which makes it easy to run on any web browsers and it will be efficient for the collection of data from the user side. ➢ The server IBM Cloud will be used for making it work without any slow loading or delay of the prediction of the website.

d. Problem Solution fit

The Problem-Solution Fit means that the solution that is realized can actually solve the problem that the customer faces.



4. REQUIREMENT ANALYSIS

a. Functional requirement

Functional Requirements specify the features and functions of the proposed system.

IDENTIFIER	REQUIREMENTS
1. Add transaction	This application will allow adding transaction.
2 Delete transaction	This application will allow the deleting transactions.
3 Amount spent in categories	This application will allow adding the amount spent in a particular category.
4 View all transactions	This application will allow viewing all previous transactions.
5 Total amount	This application will allow seeing the total amount, the amount spent in different categories and balance left.
6 Overview	This application will allow viewing overall transactions.
7 Graph representation	This application will show the graph which will help the users to visualize the budget.
8 Pie representation	This application will show the pie.
9 Bar representation	This application will show the bar.
10 Change background	This application has the option to change the background.
11 Passcode	This application has the option to set a passcode for security.
12 Add multiple accounts	This application has the option of creating multiple accounts for the users
13 Transaction time/date	This application has the ability to show the transaction time along with the date on which it was created.
14 Currency symbol	This application has many currency symbols as per user requirements.
15 Reminder	This application has the option to set a reminder to make the transaction.
16 Delete account	This application will generate PDF reports of the 5.transactions.
17 PDF report	This application has the option to view and filter transactions by day, month and year.
18 Note	This application has the option to add a note about income and expenses.

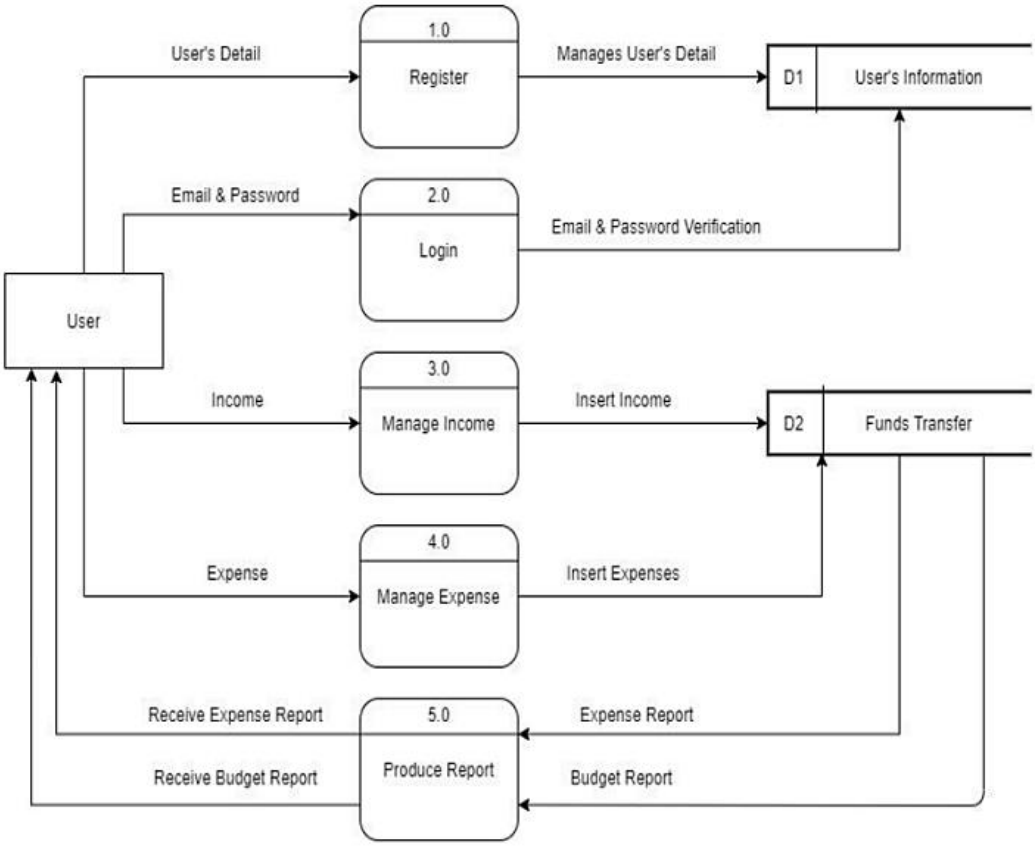
b. Non-Functional requirements

Non functional requirements specify the general properties of the proposed system.

NFR No.	Non-Functional Requirement	Description
NFR-1	**Usability**	The Application keeps an accurate record ofthe user's income and expenses.
NFR-2	**Security**	A detailed accounting of the user's incomeand expenses.
NFR-3	**Performance**	Because of lightweight database support, thesystem's throughput is increased.
NFR-4	**Availability**	The application must be completelyoperational at all times.
NFR-5	**Scalability**	The application must always function in itsentirety.

5. PROJECT DESIGN
a. Data Flow Diagrams

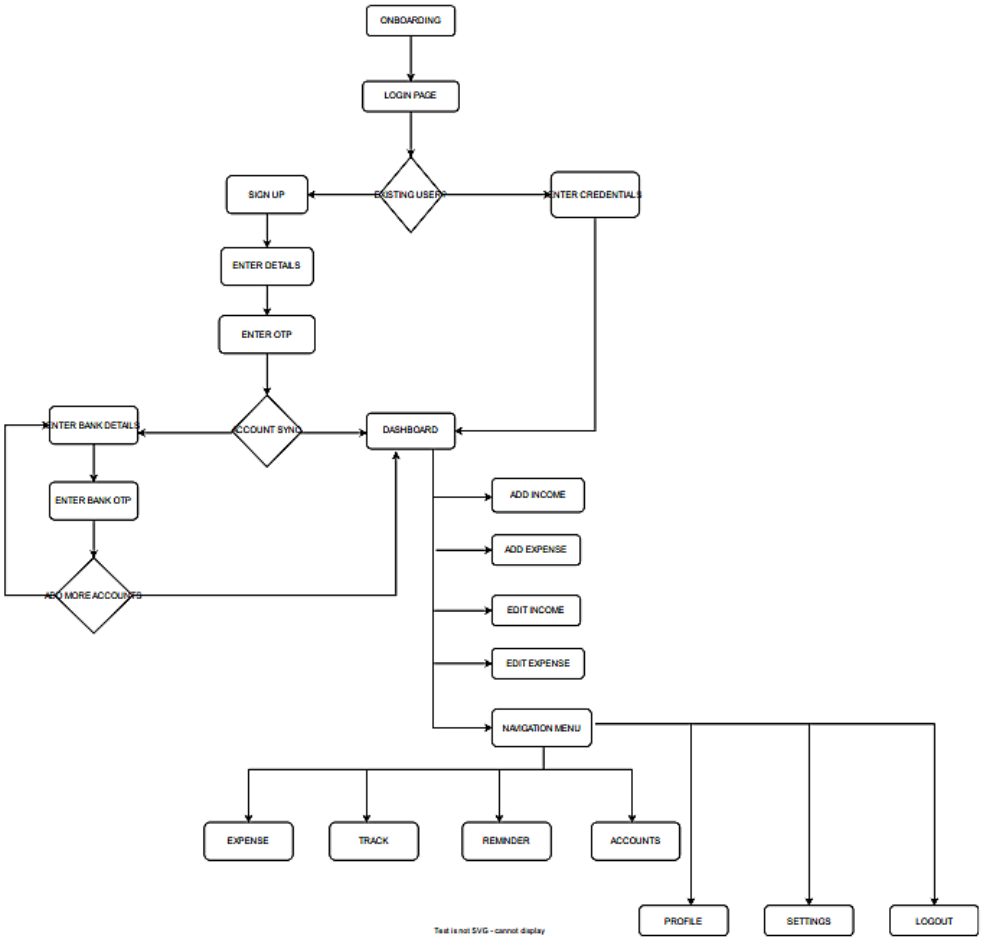
A data flow diagram or DFD(s) maps out the flow of information for any process or system. DFDs help you better understand process or system operation to discover potential problems, improve efficiency, and develop better processes.



b. Solution & Technical Architecture

Solution Architecture:

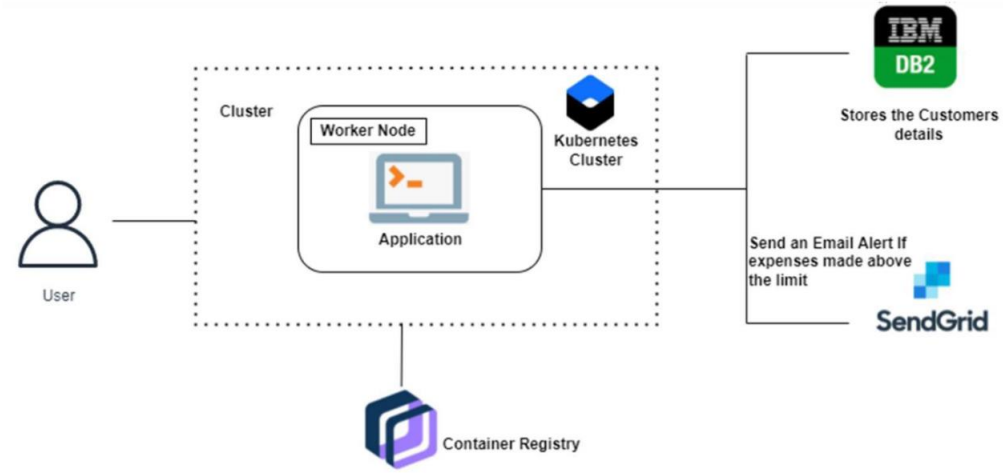
Solution architecture is the process of developing solutions based on predefined processes, guidelines and best practices with the objective that the developed solution fits within the enterprise architecture in terms of information architecture, system portfolios, integration requirements, etc.



Technical Architecture:

Technical architecture involves the development of a technical blueprint regarding the arrangement, interaction, and interdependence of all elements so that system-relevant requirements are met.

Technology Architecture:



S.No	Component	Description	Technology
1.	User Interface	User interacts with application e.g. Web App, Chatbot etc.	HTML, CSS, JavaScript
2.	Application Logic-1	Logic for a process in the application	Flask-Python
3.	Cloud Database	Database Service on Cloud	IBM DB2
4.	File Storage	File storage requirements	IBM Object Storage, Containerregistry
5.	Infrastructure (Server / Cloud)	Application Deployment on Cloud	IBM Cloud , Kubernetes.

a. User Stories

An informal, generic explanation of a software feature written from the viewpoint of the end user is known as a user story. Its objective is to explain how a software feature will benefit the user.

User Story Number	User Story / Task
USN-1	As a user, I can register for the application by entering my email, password, and confirming my password.
USN-2	As a user, I will receive confirmation email once I have registered for the application
USN-3	As a user, I can log into the application by entering email & password

USN-1	Workspace for personal expense tracking
USN-2	Creating various graphs and statistics of customer's data
USN-3	Linking database with dashboard
USN-4	Making dashboard interactive with JS
USN-1	Wrapping up the server side works of frontend
USN-2	Creating Chatbot for expense tracking and for clarifying user's query

6. PROJECT PLANNING & SCHEDULING

a. Sprint Planning & Estimation

The purpose of sprint planning is to define what can be delivered in the sprint and how that work will be achieved. Sprint planning is done in collaboration with the whole team.

Project Planning Phase
Sprint Delivery Plan

Date	01 November 2022
Team ID	PNT2022TMID16287
Project Name	Personal Expense Tracker Application
Maximum Marks	8 Marks

Product Backlog, Sprint Schedule, and Estimation (4 Marks)

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint 1	Registration	USN-1	As a user, I can register for the application by entering my email, password, and confirming my password.	2	High	Manasha P
		USN-2	As a user, I will receive confirmation email once I have registered for the application	1	High	Nukalapati Thanusha
	Login	USN-3	As a user, I can log into the application by entering email & password	1	High	Priya M
	Dashboard	USN-4	Logging in takes to the dashboard for the logged user.	2	High	Ramya J
Bug fixes, routine checks and improvisation by everyone in the team *Intended bugs only						

Sprint 2	Workspace	USN-1	Workspace for personal expense tracking	2	High	Manasha P
	Charts	USN-2	Creating various graphs and statistics of customer's data	1	Medium	Nukalapati Thanusha
	Connecting to IBM DB2	USN-3	Linking database with dashboard	2	High	Priya M
		USN-4	Making dashboard interactive with JS	2	High	Ramya J
Sprint-3		USN-1	Wrapping up the server side works of frontend	1	Medium	Manasha P
	Watson Assistant	USN-2	Creating Chatbot for expense tracking and for clarifying user's query	1	Medium	Nukalapati Thanusha
	SendGrid	USN-3	Using SendGrid to send mail to the user about their expenses	1	Low	Priya M
		USN-4	Integrating both frontend and backend	2	High	Ramya J

Bug fixes, routine checks and improvisation by everyone in the team *Intended bugs only						
Sprint-4	Docker	USN-1	Creating image of website using docker/	2	High	Priya M
	Cloud Registry	USN-2	Uploading docker image to IBM Cloud registry	2	High	Manasha P
	Kubernetes	USN-3	Create container using the docker image and hosting the site	2	High	Nukalapati Thanusha
	Exposing	USN-4	Exposing IP/Ports for the site	2	High	Ramya J

b. Sprint Delivery Schedule

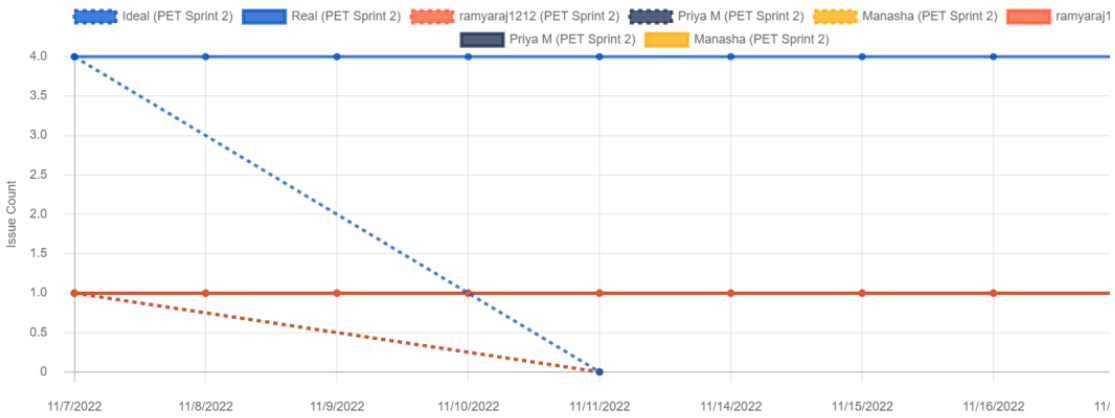
Agile sprints typically last from one week to one month. The goal of sprints is to put pressure on teams to innovate and deliver more quickly, hence the shorter the sprint, the better.

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed (as on Planned End Date)	Sprint Release Date (Actual)
Sprint-1	20	6 Days	20 Oct 2022	25 Oct 2022	20	26 Oct 2022
Sprint-2	20	6 Days	28 Oct 2022	02 Nov 2022	20	02 Nov 2022
Sprint-3	20	6 Days	05 Nov 2022	11 Nov 2022	20	12 Nov 2022
Sprint-4	20	6 Days	14 Nov 2022	19 Nov 2022	20	19 Nov 2022

Velocity:
Imagine we have a 10- days sprint duration and the velocity of the team is 20 (points per sprint). Let's calculate the team's average velocity (AV) per iteration unit (story points per day)

$$AV = \frac{sprint\ duration}{velocity} = \frac{20}{10} = 2$$

	Initial Estimate	24-Oct	25-Oct	26-Oct	27-Oct	28-Oct	29-Oct
Sprint Number	Day 0	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Sprint-1	20	0	10	5	3	1	1
Sprint-2	20	2	10	4	1	1	2
Sprint-3	20	5	5	5	5	0	0
Sprint-4	20	3	3	3	3	3	5
Task planned	7	6	5	4	3	2	1
Task Actual	7	5.5	6	4	2	1.5	1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Real (PET Sprint 2)
ramyaraj1212 (PET Sprint 2)
Priya M (PET Sprint 2)
Manasha (PET Sprint 2)
ramyaraj1
Priya M (PET Sprint 2)
Manasha (PET Sprint 2)
Issue Count
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3.0
2.5
2.0
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0.5
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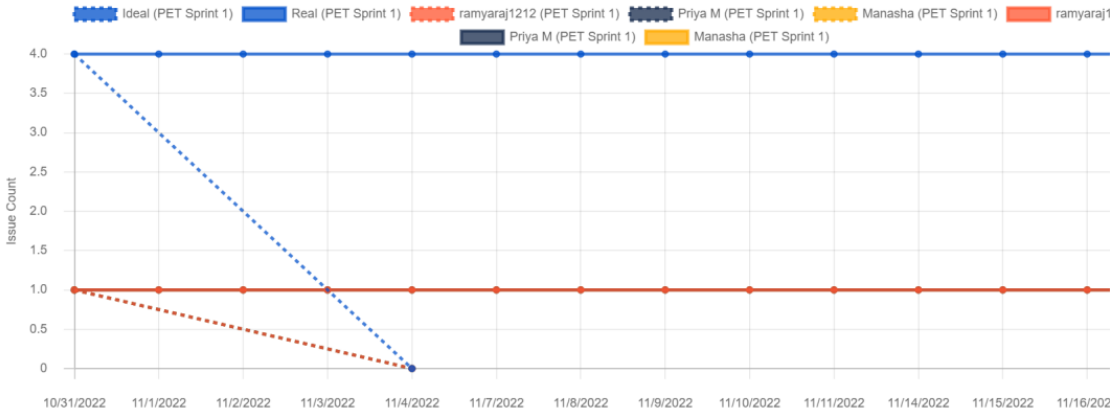
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Real (PET Sprint 1)
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Priya M (PET Sprint 1)
Manasha (PET Sprint 1)
ramyaraj1
Priya M (PET Sprint 1)
Manasha (PET Sprint 1)
Issue Count
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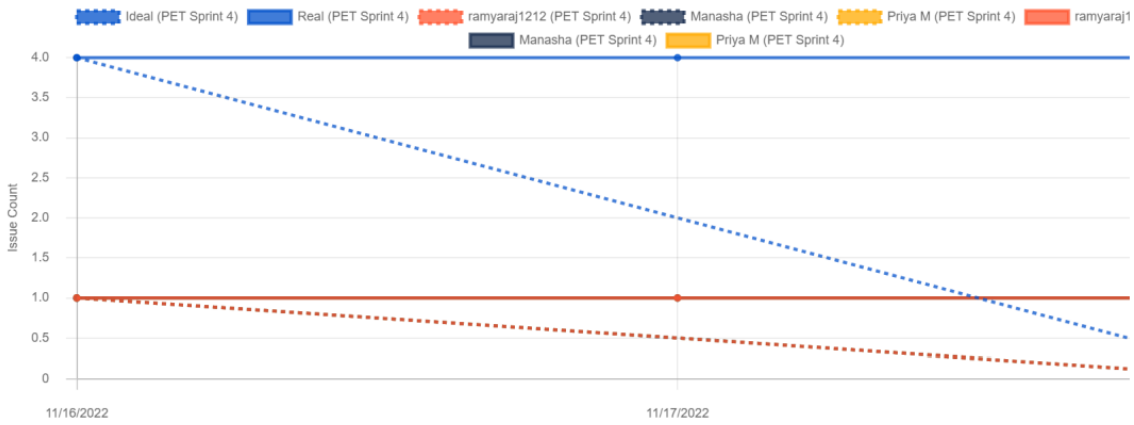
Ideal (PET Sprint 4)
Real (PET Sprint 4)
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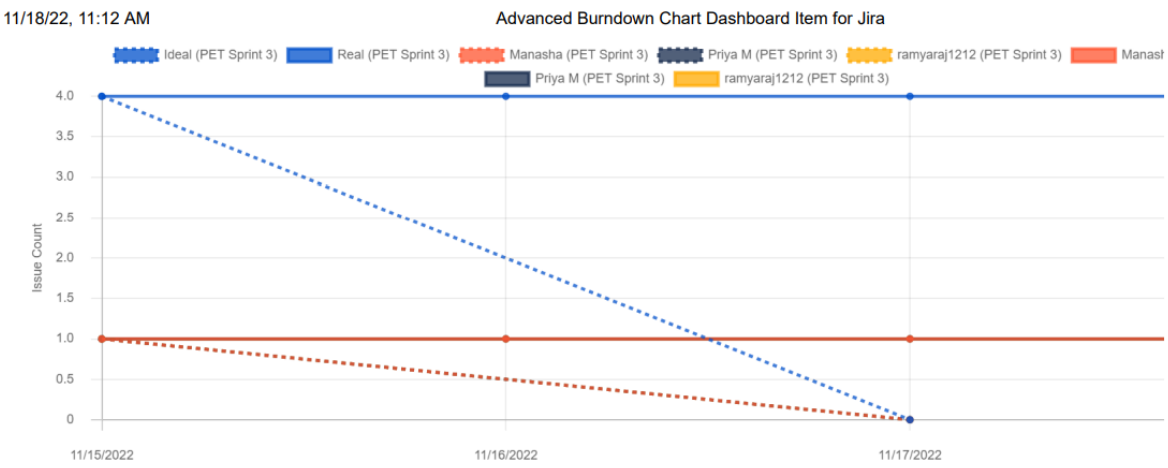
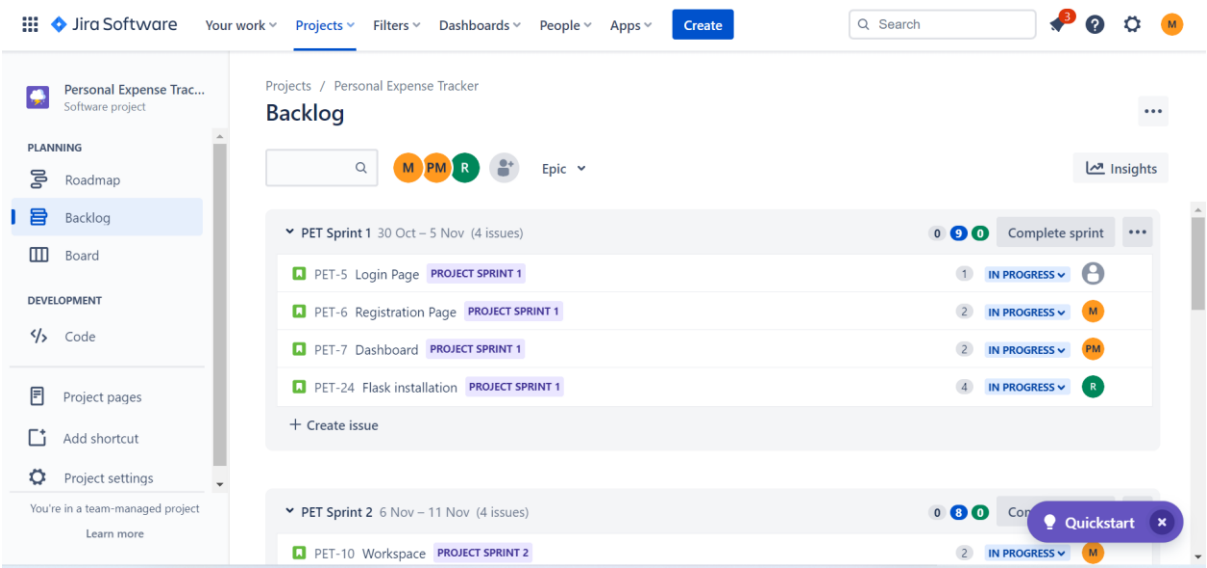
Manasha (PET Sprint 4)
Priya M (PET Sprint 4)
ramyaraj1
Manasha (PET Sprint 4)
Priya M (PET Sprint 4)
Issue Count
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0
11/16/2022
11/17/2022



c. Reports from JIRA

Backlog:

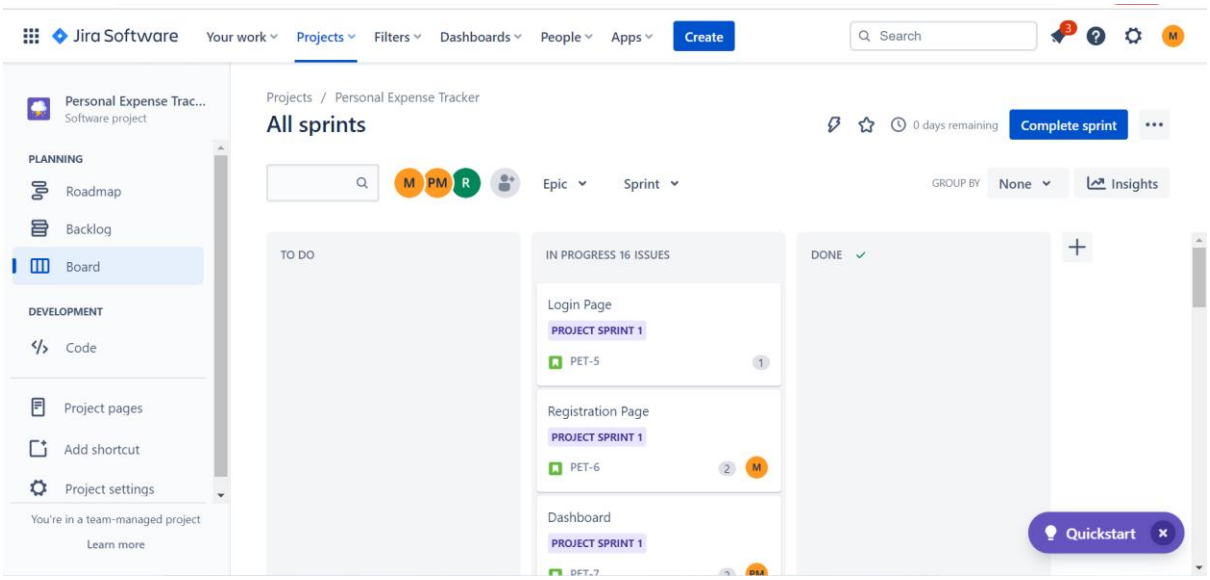
A backlog is a list of issues that's related to the project and the functions of the system. It makes it simple to make, store, manage a variety of problems including the ones the team is working on.



Board:

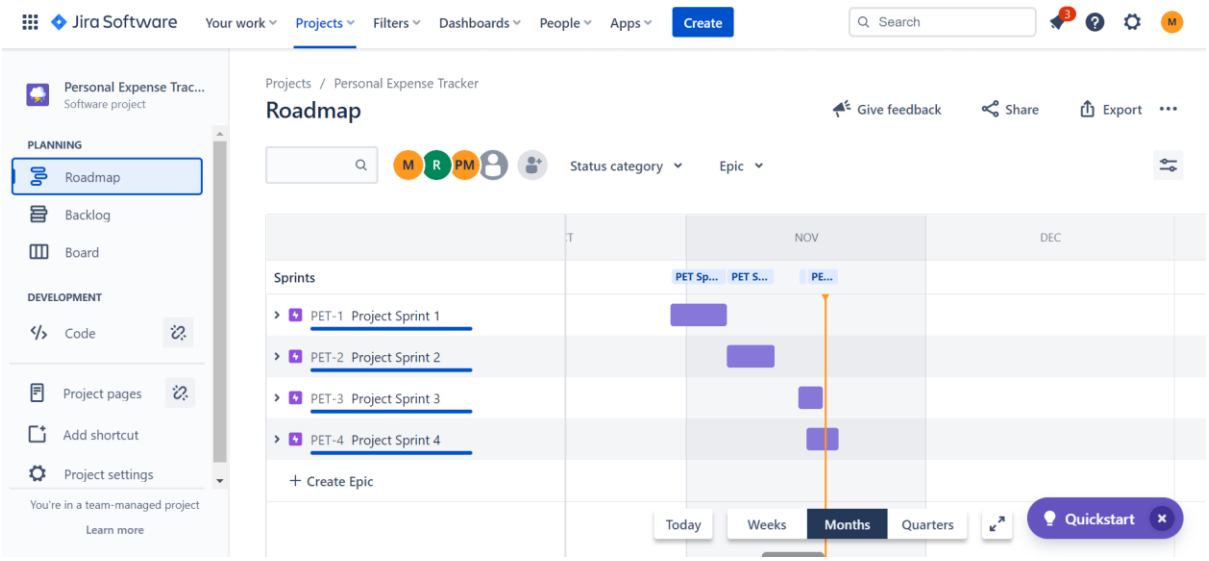
A board reflects your team's process, tracking the status of work. The columns on the board represent the status of your team's issues.

The visual representation of the work helps in discussing and tracking of the progress of the project from start to finish.

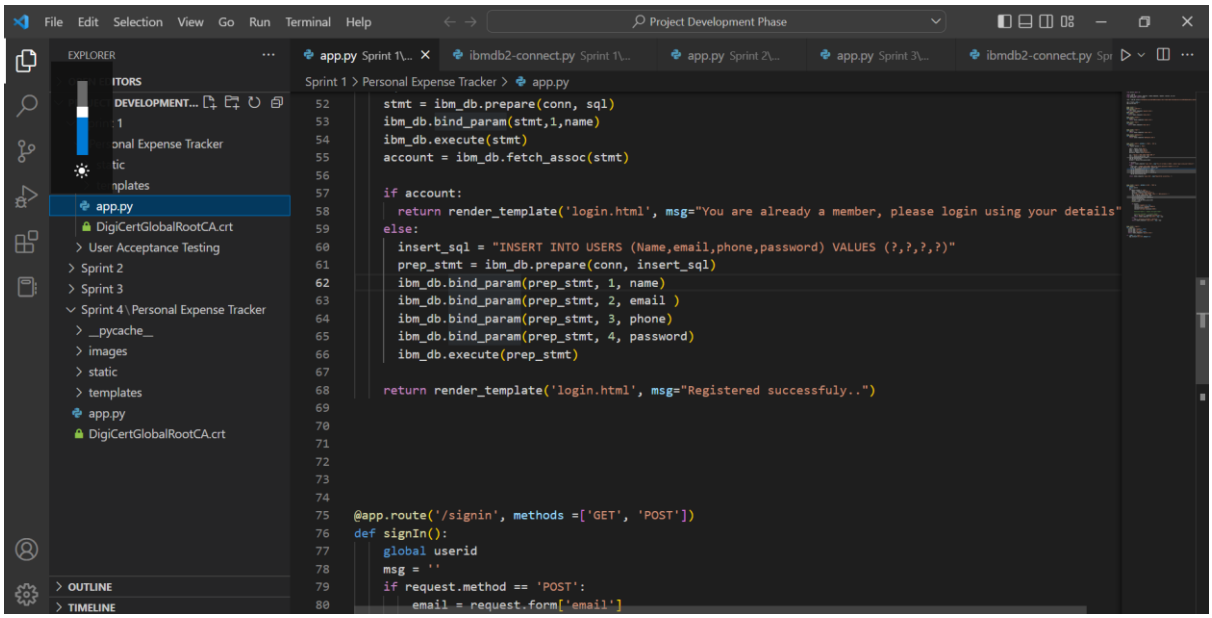


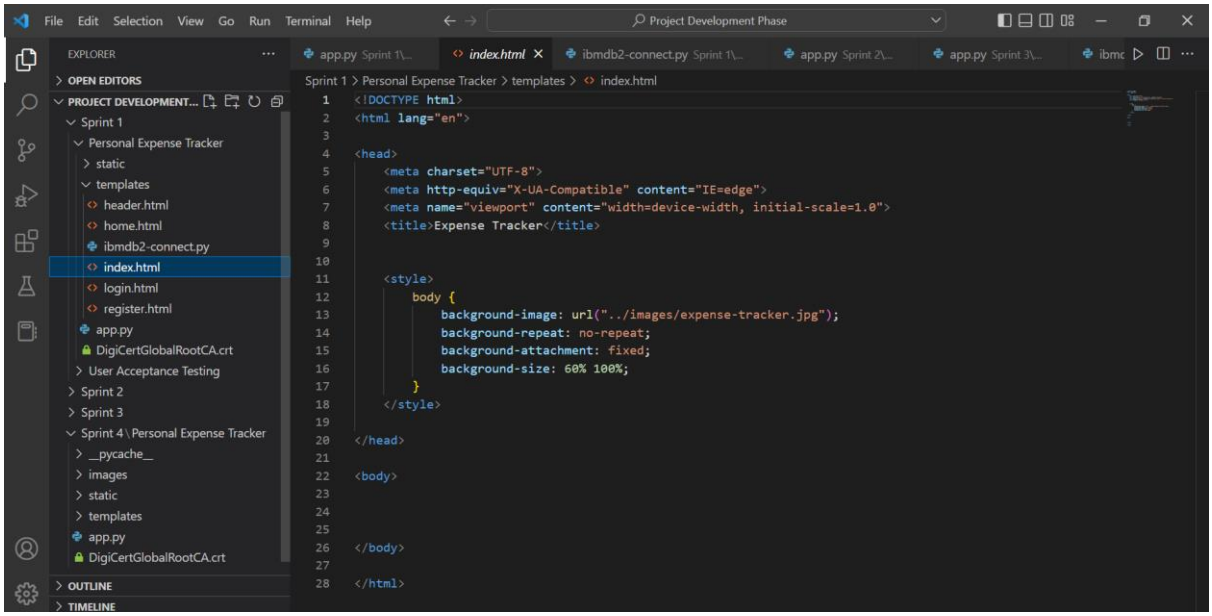
Roadmap:

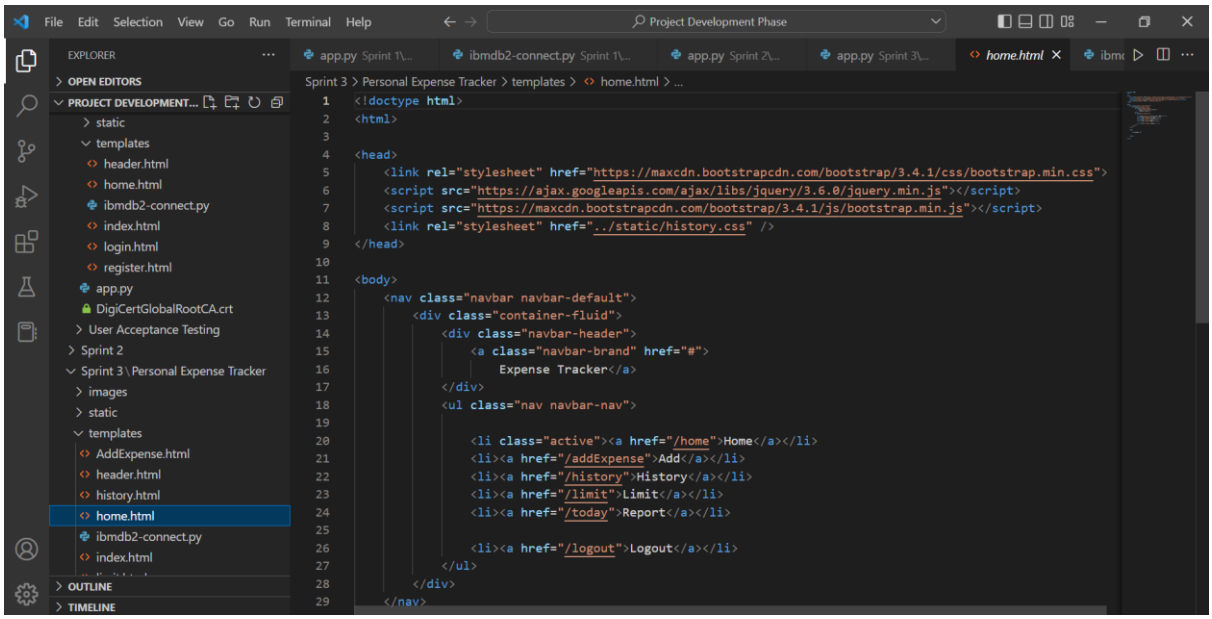
A roadmap offers quick and easy planning that helps teams better manage their dependencies and track progress on the big picture in real-time.



7. CODING & SOLUTIONING



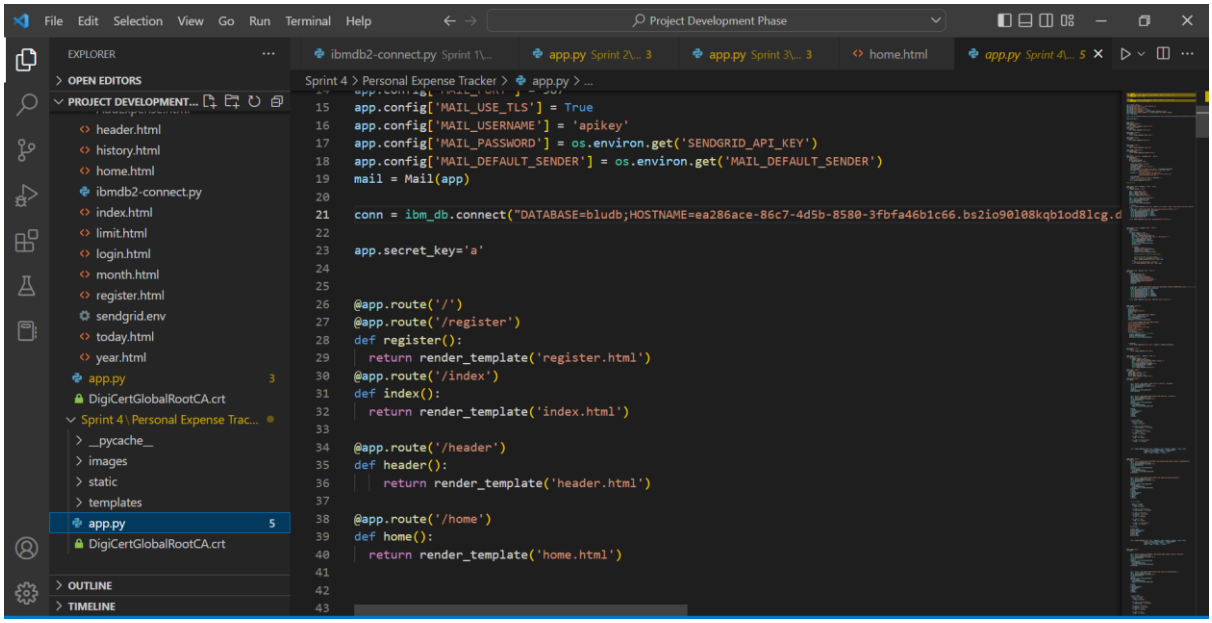

File Edit Selection View Go Run Terminal Help
Project Development Phase
EXPLORER
OPEN EDITORS
PROJECT DEVELOPMENT...
Sprint 1
Personal Expense Tracker
static
templates
header.html
home.html
ibmdb2-connect.py
index.html
login.html
register.html
app.py
DigiCertGlobalRootCA.crt
User Acceptance Testing
Sprint 2
Sprint 3
Sprint 4 \ Personal Expense Tracker
__pycache__
images
static
templates
app.py
DigiCertGlobalRootCA.crt
OUTLINE
TIMELINE
app.py Sprint 1\...
index.html
ibmdb2-connect.py Sprint 1\...
app.py Sprint 2\...
app.py Sprint 3\...
Sprint 1 > Personal Expense Tracker > templates > index.html
<!DOCTYPE html>
<html lang="en">
<head>
<meta charset="UTF-8">
<meta http-equiv="X-UA-Compatible" content="IE=edge">
<meta name="viewport" content="width=device-width, initial-scale=1.0">
<title>Expense Tracker</title>
<style>
body {
background-image: url("../images/expense-tracker.jpg");
background-repeat: no-repeat;
background-attachment: fixed;
background-size: 60% 100%;
}
</style>
</head>
<body>
</body>
</html>

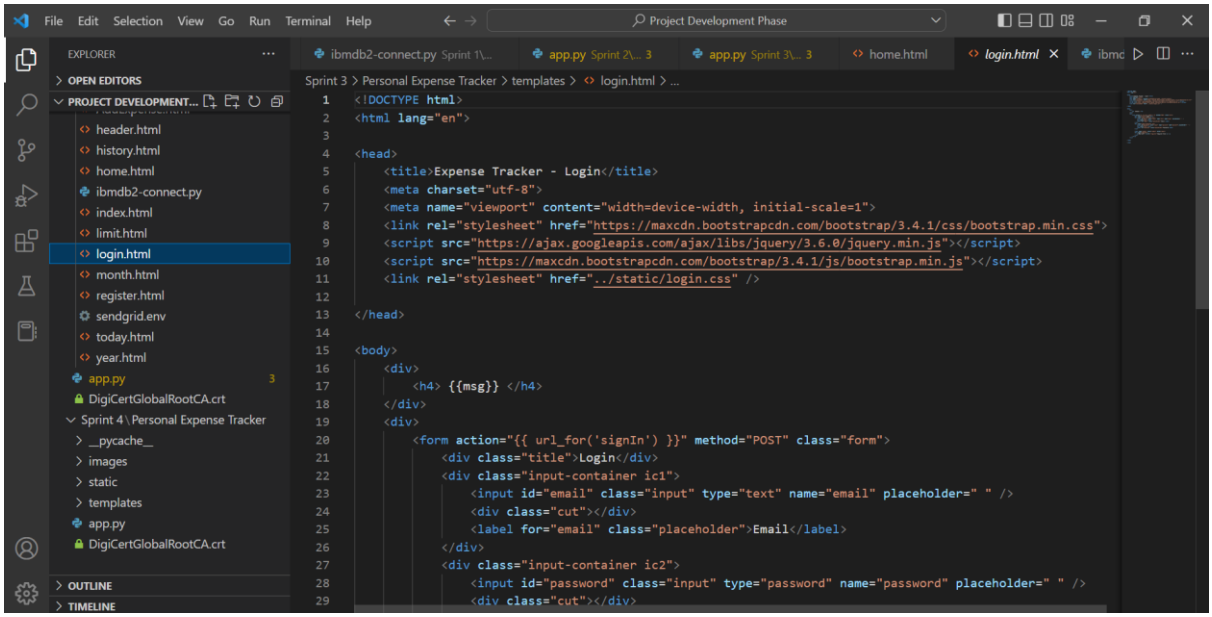

File Edit Selection View Go Run Terminal Help
Project Development Phase
EXPLORER
OPEN EDITORS
PROJECT DEVELOPMENT...
static
templates
header.html
home.html
ibmdb2-connect.py
index.html
login.html
register.html
app.py
DigiCertGlobalRootCA.crt
User Acceptance Testing
Sprint 2
Sprint 3 \ Personal Expense Tracker
images
static
templates
AddExpense.html
header.html
history.html
home.html
ibmdb2-connect.py
index.html
OUTLINE
TIMELINE
app.py Sprint 1\...
ibmdb2-connect.py Sprint 1\...
app.py Sprint 2\...
app.py Sprint 3\...
home.html
Sprint 3 > Personal Expense Tracker > templates > home.html > ...
<!doctype html>
<html>
<head>
<link rel="stylesheet" href="https://maxcdn.bootstrapcdn.com/bootstrap/3.4.1/css/bootstrap.min.css">
<script src="https://ajax.googleapis.com/ajax/libs/jquery/3.6.0/jquery.min.js"></script>
<script src="https://maxcdn.bootstrapcdn.com/bootstrap/3.4.1/js/bootstrap.min.js"></script>
<link rel="stylesheet" href="../static/history.css" />
</head>
<body>
<nav class="navbar navbar-default">

<a class="navbar-brand" href="#">
Expense Tracker</a>

<ul class="nav navbar-nav">
<li class="active"><a href="/home">Home</a></li>
<li><a href="/addExpense">Add</a></li>
<li><a href="/history">History</a></li>
<li><a href="/limit">Limit</a></li>
<li><a href="/today">Report</a></li>
<li><a href="/logout">Logout</a></li>
</ul>

</nav>





8. TESTING

a.Test Cases

Test cases are a set of actions performed on a system to determine if it satisfies software requirements and functions correctly as it claimed to perform.

b. User Acceptance Testing

Before deploying the software application to a production environment the end user or client performs a type of testing known as user acceptance testing, or UAT to ensure whether the software functionalities serve the purpose of development.

Acceptance Testing
UAT Execution & Report Submission

Date	03 November 2022
Team ID	PNT2022TMID15641
Project Name	PERSONAL EXPENSE TRACKER APPLICATION
Maximum Marks	4 Marks

1. Purpose of Document

The purpose of this document is to briefly explain the test coverage and open issues of the [PERSONAL EXPENSE TRACKER APPLICATION] project at the time of the release to User Acceptance Testing (UAT).

2. Defect Analysis

This report shows the number of resolved or closed bugs at each severity level, and how they were resolved

Resolution	Severity 1	Severity 2	Severity 3	Severity 4	Subtotal
By Design	10	3	1	2	16
Duplicate	1	0	3	0	4
External	2	3	0	1	6
Fixed	11	2	4	20	37
Not Reproduced	0	0	1	0	1
Skipped	0	0	1	1	2
Won't Fix	0	5	2	1	8
Totals	24	13	12	25	74

3. Test Case Analysis

This report shows the number of test cases that have passed, failed, and untested

Section	Total Cases	Not Tested	Fail	Pass
Print Engine	10	0	0	10
Client Application	50	0	0	50
Security	1	0	0	1
Outsource Shipping	3	0	0	3
Exception Reporting	8	0	0	8
Final Report Output	4	0	0	4
Version Control	2	0	0	2

9. RESULTS

Performance Metrics

Metrics are a baseline for performance tests. Monitoring the correct parameters will help you detect areas that require increased attention and find ways to improve them.

Resolution	Severity 1	Severity 2	Severity 3	Severity 4	Subtotal
By Design	10	3	1	2	16
Duplicate	1	0	3	0	4
External	2	3	0	1	6
Fixed	11	2	4	20	37
Not Reproduced	0	0	1	0	1

3. Test Case Analysis

This report shows the number of test cases that have passed, failed, and untested

Exception Reporting	8	0	0	8
Final Report Output	4	0	0	4
Version Control	2	0	0	2

10. ADVANTAGES & DISADVANTAGES

Advantages:

1. **You have no control over your money** If you don't check your spending and create a budget,you will have no control whatsoever on your money.Instead, money will control you, and you will either have perpetual lack of funds or you will end up steeped in debt. A money manager app helps you decide between short-term and long-term spending.

2. **You have no financial goals** If you are spending money frivolously, you will not have money to set financial goals. However, when you have a daily expens e manager,you will be able to work with limited resources and use your money in a wise manner so that you can create financial goals and ensure you meet them.

3. **You are unaware what is happening with your money** If you are clueless about how much is your inflow and how much you are spending, you will not know at the end of the month what happened to your money. An expense tracker helps you figure out what is happening to your money, and whether you can afford something you want.

4. **You spend and save in a haphazard manner** If you don't have gr eat financial management skills, you will not know how to categorize your expenses. However,tracking your expenses and budgeting them will help you become aware of how much you have to allocate to each expense category, and if you are short, you will be able to make adjustments with ease.

5. **You have no clue about making your money work for you,** In this day and age, when expenses are going through the roof, it has become crucial that you learn to make your money work for you so that you can create a nest egg for the future.

6. **You don't have funds for emergencies** Remember, emergencies co me when you least expect.Hence, if you don't have money stashed away for a rainy day, you will end up borrowing from family and friends. This way you could get into debt that will be difficult to pay back due to your poor money management skills Disadvantages

Disadvantages:

a. Your information is less secure,and probably being used and s old. If the service is free, then the product is you. Mint.com, like other financial apps, is a free service. They have to pay their bills somehow, so regardless of what their privacy policy may or may not say, just assume that your spending history and trends are going to be recorded and analyzed, by s omeone, somewhere.

b. Now, you shouldn't have to worry about credit card fraud or identity theft, these companies are large enough and secure enough that you'll never
have to worry about something like that. Just recognize that your information, most likely anonymous, will be used and potentially even sold.

c. Personally, I have no problem with that, but if you do, then make sure you avoid these types of services. Automating everything to do with your finances can make you financially lazy.
If your bills are paid automatically and your finances are track automatically, then what is there left for you to do? Not a lot, to be honest. So you might stop caring about what you're spending and where your money is going.

d. Eventually you may look at your Mint data and realize that you've blown your budget over the last two months, but by then it is too late. So if you do choose to use this program, ensure that you are also being diligent in checking in on your finances.

e. Set up a weekly or biweekly check for yourself to go through your finances and hit on all the important points.

11. CONCLUSION

After making this application we assure that this application will help its users to manage
the costof their daily expenditure. It will guide them and aware them about there daily expenses.

It will prevent to be helpful for the people who are frustrated with their daily budget management, irrit ated becauseof amount of expenses and wishes to manage money and to preserve the record of their daily cost which may be useful to change their way of spending money.

In short, this application will help its users to overcome the wastage of money. to be helpful for the people who are frustrated with their daily budget management, irrit ated becauseof amount of expenses and wishes to manage money and to preserve the record of their daily cost which may be useful to change their way of spending money.

In short, this application will help its users to overcome the wastage of money.

12. FUTURE SCOPE

The further enhancement that are planned for developing the application to be user friendly
and further features like login with gmail or social media accounts using facebook or twitter and also using SSO login so that it is helpful for users to get into platform easily.

13. APPENDIX

Github & Demo Link

DemoLink:

https://drive.google.com/file/d/1YENRocn5A-mzHrIqyX0RJBz9UMqOMI52/view?usp=share_link

GithubLink:
https://github.com/IBM-EPBL/IBM-Project-23399-1659881749