TERAH — Artefact Agreement

(Group: T327 | Project: 393)

# 1) Overview

**Project**: TERAH - The Epic Retirement AI Helper

**Team:** T327 – Charles McVeigh, Cole Smart, Jonathan Tebble

**Industry Partner:** The Epic Retirement Institute (Bec Wilson)

**Tutor:** Alex Douglass-Bonner

**Version:** Draft

# 2) Purpose & Outcomes

Deliver a production‑ready, chatbot that provides general, factual Australian retirement information, with source citations, strong guardrails (no personal advice), and an accessible UI. Evidence of delivery is via user‑story acceptance tests and iterative test results.

# 3) Delivered Scope (refine once project closer to completion)

Define three delivery levels for this semester; assess based on measurable acceptance tests and how well features work.

## A. Base system

* Core chat flow (React + API) with disclaimer banner and message‑level safety check.
* Answers show relevant and client verified source reference.
* Static approved corpus loaded; simple retrieval/selection.
* Acceptance tests pass for core user stories (see 6).

## B. Enhanced system

* Two-factor validation of responses.
* Guardrail pipeline blocks advice‑seeking prompts; audit log of blocks.
* Accessibility pass (keyboard nav + basic WCAG checks) and mobile layout.
* Automated unit tests on core services.

## C. Stretch system

* Robust context management (trimming, topic routing) improving answer quality.
* Dataset update runbook + scheduled scraping/refresh guide.
* Comprehensive acceptance test suite across releases, high test stability, clean UI polish.
* Professional packaging & docs indistinguishable from an experienced team.

# 4) Deliverables – handed to project owner

1. Working Product: Web chatbot + source repo.
2. User Guide: Install/use steps, screenshots, FAQs, limitations.
3. Technical Documentation: Architecture, data/knowledge flow, environment & deployment, API usage, secrets handling, monitoring.
4. Test Pack: User‑story acceptance tests with input/output examples and pass results, automated unit tests and coverage report.
5. Source Index: Approved datasets/pages mapped to topics + approval documentation.
6. Handover Checklist: Accounts/keys, repo permissions, data folders, update procedure, and more.

# 5) Out of Scope

* Any personal financial advice or user‑specific optimisation.
* Live integration
* ChatGPT replacement of the Gemini integration
* Real‑time regulatory monitoring beyond the semester.

# 6) User Stories & Acceptance Tests

List of user stories with specific acceptance tests.

| **ID** | **User Story** | **Expected Output** |
| --- | --- | --- |
| 1 | As a user, I want to start a conversation with the chatbot so that I can begin asking retirement-related questions. | The chatbot greets the user and prompts them to enter their query. |
| 2 | As a user, I want to input a retirement-related question so that I can receive relevant information. | The chatbot accepts input and responds within 3 seconds with compliant guidance. |
| 3 | As a user, I want to receive links to official resources so that I can verify information independently. | The chatbot provides valid, clickable links to government or industry sources. |
| 4 | As a user, I want the chatbot to recognise when my query is outside its scope so that I’m not given misleading information. | The chatbot replies with a clear message like “I am unable to provide specific financial advice. Consider seeking advice from a licensed financial advisor..” |
| 5 | As a user, I want to view the conversation on a single full-page interface so that I can follow the discussion easily without navigating between screens. | The chatbot displays the conversation in a continuous full-page format |

# 7) Artefact Quality

Provide documented evidence across iterations, unit tests, coverage, passing runs, rapid fixes, architectural review, and code quality consistent with unit expectations.

# 8) Artefact Presentation

Demonstrate a clean UI, easy installation/configuration, and high‑quality supporting materials, specifically the User Guide. Package the submission professionally and include the source files and key material surrounding the project.

# 9) Risks & Mitigations

All breakdowns or issues surrounding the project including but not limited to.

* Advice leakage → layered guardrails + blocked‑prompt tests
* Broken links/incorrect sources → link‑check script, curated source index
* Error codes → code breakages or file mismanagement

will become the project owner’s responsibility post hand over.

# 10) Handover & Sign‑off

User Guide, Technical Docs, Test Pack (results), Source Index, Runbook, Accounts/Keys, Release notes. Sign‑off:

| **Project Owner / Client:** | Date: 26 / 9 / 25 |  |
| --- | --- | --- |
| **Team Member 1:** Cole Smart | Date: 8 / 9 /25 |  |
| **Team Member 2:** Jonathan Tebble | Date: 8 / 9 /25 |  |
| **Team Member 3:** Charles McVeigh | Date: 8 / 9 /25 |  |