

Project Proposal

Finance application for your Smartphone

Project Name	FinanceM
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Document state	In process
Version	V. 1.0

Revisions

Date	Author	Change
	C. Tumfart/L. Trimabcher	First version

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1 Introduction

Your FinanceM application should be a helping hand to have an overview about your finances. The user can document his expenditure, bills, income and his money flow. The application is going to have an userfriendly interface which makes it more easier to work with it even if you are not into technologie. After all it should be an application which is easy to handle that helps the user to have a better overview about his in and outgoings.

2 Initial Situation

The initial situation presents the assessment of the actual situation of an organizational unit or the entire organization of an agency or company. Thus a need for action, which may lead to a product or system vision, is recognizable. The vision may be developed into a project idea. The need for action may be initiated by several project or system ideas. The demonstration of capability gaps (i.e. the difference between the necessary planned capabilities and the actually existing capabilities) in a company or agency may clearly show an urgent need for action in order to increase the efficiency or reduce costs. This need for action is presented as product or system idea, leading frequently to a concrete project proposal. Correspondingly, the determination of the requirement to renew or improve a "technically obsolete" system (so-called "system regeneration") or the recognition of market chances for a new product or system may lead to a project idea. The applicable data must be developed for the project proposal. Research programs or studies may also be the basis for project ideas; they will be concretized in a project proposal.

The basic question could be summarized in German as follows:

- *Die Ist-Fähigkeiten der Organisation (was können wir?)*
- *Die Soll-Fähigkeiten der Organisation (was wollen wir können?)*
- *Ein Soll-Ist-Fähigkeitenvergleich (wo liegen die Defizite?)*
- *Ein Fähigkeitsvergleich nach vorgegebenen Bewertungskriterien*

Example 1. A doctor in a (primary) school examines the primary school students periodically. (S)he must report the results of this examinations and inform parents about medical defects. Sometimes the doctor has to refer students in problematic health condition to specialists.

The creation of the paperwork is time-consuming since the health data collected during the examinations has to be edited several times (once for the reports, once for the parents information, once for referral, etc. The information retrieval concerning the medical history of students is also time-consuming. The time spent on this work would be better used on direct contact time with students.

The documentation of the examinations can be automated. So the reports and further documents will be generated. The medical history will be persisted automatically.

You are a busy person which is not this much into technologie? Thats is no problem, with the FinanceM application our team is working on the target to make it as easy as possible to creat an overview for the user about his in and outgoings.

3 General Conditions and Constraints

This subject describes the framework conditions to be observed by all stakeholders when the project idea is implemented into concrete measures for realizing the system. Framework conditions, e.g., budget situation, existing know-how, legal provisions, cooperations, commitment to partners and deadlines, may be turned into specifications for project execution. Technical framework conditions, e.g., development environments and platforms, IT infrastructure, applicable standards and regulations, or specifications of off-the-shelf products, lead to additional (non-functional) requirements for system development.

Example 2. The proposed system has to deal with the following constraints:

- The information about the medical condition of the pupils is strictly confidential.
- The GUI of the information system must be intuitive.
- The application must have a small footprint and a local database.
- A backup concept is mandatory
- The application is multi-language capable (english and german)

To run our application smoothly and without technical incidents we recommend:

- The language is english
- An easy usable userinterface
- Saving userdata on the device and not at an server for more security
- Use of PSD2 to synchronise the application with your bank account

4 Project Objectives and System Concepts

In the Subject Project Objectives and System Concepts, the acquirer describes his vision of a new project or system on a high abstraction level. Project objectives and system concepts may concern several aspects, e.g., the introduction of innovations, the definition of objectives (quality, deadline and cost objectives), the operation of the system in its operating environment and the use of new, improved functionalities.

Example 3. The project objectives can be summarized as follows:

- The doctor is documenting the examination results while examining the students
- Input form assists her/him to input information in a structured and easy way
- Common situations (need for vaccinations, check for need of dental brace, etc.) are a one-click-job for the doctor
- Info sheet for parents can be printed right after examination
- Report is a one-click-job at the end of the day

The objectives of our project are the following:

- Its easy for the user to enter the informations in a structured way
- Compared overview for the user
- In and outgoings are collected into groups(food, mobility, etc.)

5 Opportunities and Risks

The Subject Opportunities and Risks comprises data which are normally prepared in industrial business plans. Frequently, an anonymous market with potential acquirers, which could be interested in the new product or system idea, will be analyzed at first. Therefore, the contents of this subject is characterized by a certain uncertainty or fuzziness. The subjects examines the chances of achieving profit on the market with a specific product or system. In addition to the chances, the risks of failing on the market or sustaining losses with a product or system should be analyzed.

Example 4. The project has the following opportunities:

- The doctor is able to increase his time with his patients.
- The time for bureaucratic work declines.
- The quality will increase

The following risk have to be taken into account.

- Data transfer of students' master data from legacy systems is problematic.
- There is no information about the legacy systems and their data structure.
- Further there is no information, whether the staff is capable and willing to supply the students master data (names, classes, ...).

Our application has the following opportunities:

- Making it easier for the users to have a overview about their finances
- Its takes less time than with a pen and paper

There are also a few risks:

- Its hard to get the live data from the bankaccounts
- Storing the data at the local device

6 Planning

The planning specifies the organizational and commercial project execution and system development aspects. The project organization, e.g., matrix organization and steering committees, and the responsibilities for the decision-making processes within project will be specified. The Project Leader will be appointed, his tasks will be defined. Available resources, funds and specialist personnel will be determined. Start and end date for the project will be specified. The planning can be based on the statements developed in the subject Project Objectives and System Concepts, which makes additional statements on feasibility, funding and schedules. The following parts must be included:

- *List of major project milestones.*
- *Assign project lead and other outstanding roles to team members.*
- *Give a rough estimate how many resources you need (human resources, licenses, servers, etc.)*

Answer the following questions when preparing this section:

- *When will the project end?*
- *When will the project start?*
- *When will be a first prototype available?*
- *When does implementation work start?*
- *What are the big blocks of work to be done?*
- *Is this work doable in the given period of time?*
- *Do we need any other stuff to make our work (licenses, servers, É)?*