# Scope Statement

Within this project we are looking to plan out the potential implementation of finappster's three major users and the functionality required to achieve this, with one of these users being the development focus of finappster sigma, and the other two designed for use by future finappster teams. These three users being the investor, the investment provider, and the admin support user, with the investor's expected user journey being the development scope of finappster sigma.

The investor will be the most common user of finappster, browsing the web app to discover where their ethical and sustainable values stand, and using this information to compare to how their existing investments stack up against these results, and to get suggestions on new investments based off these results. The existing finappster coding infrastructure already supports some of the functionality to achieve this, such as an early version of the quiz, another finappster team working concurrently providing a database of investments that have investment/Sustainable Development Goals (SDG) data to fetch, user login/signup functionality and a dashboard screen that displays some of the investment information already, but to achieve the project objective, a considerable amount of work is still required.

The investment provider will be the second most common user of finappster, representing institutions that construct investment funds or sell stock, such as banks. Their interest in finappster is to advertise their investments to investors looking to buy stock, catering to those that use the web app looking for investments that match their values. To achieve this, finappster requires functionality to allow investment providers to sign up and input their investments into the website, which will subsequently be added to a database that will be displayed on the 'My Values' page under the 'suggested investments' section that will be developed by finappster sigma to users that have similar values.

The final user is the admin support user, which represent the employees of finappster. This user will consist of employee(s) of finappster or the client herself, providing an avenue to answer emails/calls from other users of the app when they need help and to provide an avenue to insert, edit or delete investments and user data in the database using a user-friendly interface (rather than requiring programmers to interact directly with the database through code). The other finappster team working concurrently with finappster sigma, finappster tau, has recently developed an interface to insert investments and their related SDG data, but to finappster sigma's understanding, it is not within finappster tau's scope to develop all the features of the admin support user mentioned above.

The following steps have occurred to achieve part of the scope statement above:

- Upskill on financial industry and finappster
- Finished discussing planned scope with client.
- Create a model to display the flow of data within finappster.
- Examined data streams/database by finappster tau, found understanding of their scope.
- Reviewed existing finappster infrastructure in detail, making sure intended scope was not overlooking anything significant.
- With the scope clear, finalized the overall user journey of investment provider, investor, and administrator users. Made use of wireframes and Miro sequence diagrams to make the intended implementation of the project objective clear for the current development team and future teams.

- Collaborated with the client to develop a comprehensive list of all possible user stories that are relevant to this project.

The following steps are required to achieve the rest of the scope statement above:

- Examine, sanitize, model, and document the databases present within the finappster system
- Take a key few of these user stories through the development pipeline, working on the ones with the highest priority first. (Product backlog Sprint backlog in development User Acceptance Tests (UAT) (development team) UAT (Client) ( Back to a previous step if UAT (Client) fails) Satisfy Definition of Done).
- Complete the previous step in each sprint. Currently three sprints are planned (refer to project schedule) but room for a fourth or even more is possible if needed