Addressing Leeanna's feedback

Barry Dowdeswell <barry.dowdeswell@aut.ac.nz>
Fri 10/09/2021 1:35 PM
To: Chris Stehlin <prq5006@autuni.ac.nz>;Leeanna Kohn-Hardy <leeanna.kohn-hardy@finappster.co.nz>;Peter Scandle <vzp7444@autuni.ac.nz>;Jose Santos <sff4900@autuni.ac.nz>;John Isaiah Sangalang <jsj6212@autuni.ac.nz>

Thank Leeanna,

Just a thought team: these look important and should be discussed.

However, I do not think you should rework the proposal or the timelines. Instead, how about adding them to an Appendix and say that these arose as a result of reviewing the proposal with the client (i.e. Leeanna) and have been added as *Stretch Goals* to be tackled as they arise while working on the existing plan.

Happy to discuss this on a Teams chat if you have any queries.

Kind regards,

badger

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Fellow of the Higher Educational Academy (FHEA).
SERL (Software Engineering Research Laboratory) and EMSOFT (Embedded Software Research Group),
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From: Leeanna Kohn-Hardy <leeanna.kohn-hardy@finappster.co.nz>
Sent: Friday, 10 September 2021 12:16 PM
To: Barry Dowdeswell <barry.dowdeswell@aut.ac.nz>; Chris Stehlin <prq5006@autuni.ac.nz>
Cc: Peter Scandle <vzp7444@autuni.ac.nz>; Jose Santos <sff4900@autuni.ac.nz>; John Isaiah Sangalang <jsj6212@autuni.ac.nz>
Subject: {Spam?} Re: Proposal (mostly final)

Thanks team

Looks great and I've popped a couple of comments in here (attached). Super excited you're looking to use ML to do the recommendation piece 🙂 🙂

Key things from me:

- would be ideal for us to push live what you work on before the end of this paper
- technically I'm not qualified to give financial advice so rather than saying "recommendation" can we say something like "showcasing investments that align with users' values", and
- in light of the design thoughts i sent through yesterday I did some more thinking around the user journeys. Suggestions for the functional requirements (your original in black font; my suggestions in red font) are outlined below. On speaking with Badger we're agreed that this should be included in the appendix so we can complete the proposal and get stuck in.

Happy to chat if you have thoughts/questions. Otherwise have a great weekend and I look forward to catching up again in a couple of weeks.

Functional requirements, p11

• Any investor user shall be able to do a short quiz.
• The investor user shall never be allowed to submit a short quiz result without ranking the 5 Ps first.
• The new investor user shall register to view quiz results and add investment information.
• The system shall record a user's data in the database upon said user signing up to the website.
• The existing investor user shall login to view 5P quiz results and how it aligns with their current investments.
• The investor user shall be able to view their 5P quiz results on the 'My Values' page.
• The investor user shall not be able to view specific information relating to the SDG of a P they are looking at on the 'My Values' page unless they have completed the long quiz.
• The investor user shall be able to redo the short quiz if they have not already logged in to see their results.
• The investor user shall not be be able to see the updated 5P results from the short quiz if they log in using an existing log in.
• The investor user will be notified that they will not be be able to see the updated 5P results from the short quiz because they have used an existing log in.
• The investor user will be prompted to complete the long quiz if they have not already done the long quiz.
• The investor user will be prompted to review their long quiz results if they have already done the long quiz.
• The investor user shall not be logged in to be able to view the 'My Values' page before doing and encouraged to do the long quiz.
• The investor user who navigates to the 'My Values' page but has not yet done the short or long quiz will be encouraged to do the long quiz.
• The investor user shall be able to do a long quiz.
• The investor shall be able to drag SDG options into a ranked format in the long quiz.
• The investor user shall never be allowed to submit a long quiz result without ranking all 17 SDGs first.
• The system shall record a user's input SDG data upon clicking the submit button on the long quiz if the user has not yet done the short quiz.
• The system shall replace a user's short quiz data with the newly input SDG data upon clicking the submit button.
• The investor user shall be able to view their specific SDGs for the 5 P's displayed on the 'My Values' page.
• The investor user shall be able to view specific information relating to the SDG of a P they are looking at on the 'My Values' page.
• The investor user shall be able to view SDG values for each specific SDGs for their existing investments they are viewing on the 'My Values' page.

• The investor user shall be able to view ~~recommended~~ other investments that closely align with their values upon navigating to the 'My Values' page.

• The investor user shall be able to redo the long quiz.
• The system shall archive the user's previous long quiz data results and add the new long quiz data results upon clicking the submit button.
• The investor user who redoes the long quiz will be able to see their updated SDG values, how it compares to their aggregate investments and other investments.

• The admin will be able to see aggregated short quiz results of all users who have completed the short quiz, but not the long quiz.
• The admin will be able to see the most current, aggregated long quiz results of all users who have done the long quiz.

• ~~The investor user shall not be able to navigate to the 'My Values' page without completing a quiz first.~~
• ~~The investor user shall not be able to view the 'My Values' page before doing the short quiz.~~
• ~~The investor user shall not be able to view the 'My Values' page before doing the long quiz.~~
• ~~The investor user shall be able to view their existing investments upon navigating to the 'My Values' page.~~

• ~~The system shall provide the current pricing of a fund provided by an investment provider.~~
~~The investment provider user shall register to advertise their scheme/fund.~~
• ~~The investment provider shall be able to login to the website.~~
• ~~The investment provider shall be able to add their scheme/fund.~~

PS - did you see finappster showcased as one of three #fintechstartups in [BusinessDesk NZ's article](#)?

Kind regards
Leeanna

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From: Barry Dowdeswell <[barry.dowdeswell@aut.ac.nz](#)>
Sent: Friday, 10 September 2021 11:26
To: Chris Stehlin <[prq5006@autuni.ac.nz](#)>; Leeanna Kohn-Hardy <[leeanna.kohn-hardy@finappster.co.nz](#)>
Cc: Peter Scandle <[vzp7444@autuni.ac.nz](#)>; Jose Santos <[sff4900@autuni.ac.nz](#)>; John Isaiah Sangalang <[jsj6212@autuni.ac.nz](#)>
Subject: RE: Proposal (mostly final)

Hi Chris,

I have attached a review of the PDF version after I converted it to Word. Overall, this is excellent and I only made a few minor suggestions.

The only significant problem I saw was that there is a large section starting at page 31 which repeats at page 49. Is that just a cut-and-paste error?

Looking great guys – let's sign this off soon after I talk to Leeanna.

Cheers,
Badger

From: Barry Dowdeswell
Sent: Thursday, 9 September 2021 9:50 AM
To: Chris Stehlin <[prq5006@autuni.ac.nz](#)>; Leeanna Kohn-Hardy <[leeanna.kohn-hardy@finappster.co.nz](#)>
Cc: Peter Scandle <[vzp7444@autuni.ac.nz](#)>; Jose Santos <[sff4900@autuni.ac.nz](#)>; John Isaiah Sangalang <[jsj6212@autuni.ac.nz](#)>
Subject: RE: Proposal (mostly final)

Thanks team,

I am in meetings all morning so I will get to this early this afternoon. Well done !!

Cheers,
Badger

From: Chris Stehlin <[prq5006@autuni.ac.nz](#)>
Sent: Wednesday, 8 September 2021 11:47 PM
To: Barry Dowdeswell <[barry.dowdeswell@aut.ac.nz](#)>; Leeanna Kohn-Hardy <[leeanna.kohn-hardy@finappster.co.nz](#)>
Cc: Peter Scandle <[vzp7444@autuni.ac.nz](#)>; Jose Santos <[sff4900@autuni.ac.nz](#)>; John Isaiah Sangalang <[jsj6212@autuni.ac.nz](#)>
Subject: Proposal (mostly final)

Hey Barry/Leeanna,

Here's the proposal. There's a couple of minor formatting things (i.e. table of contents numbering, some spacing for instance) that we want to iron out, but figured we'd send it off to you for feedback so there's time to adjust if need be before the semester starts.

Let us know what you think.

Thanks,
Chris