Sprint goal: Finish funds and funds recommendation implementation, shares and funds recommendation implementation tidy-up, bulk data upload implementation, Heroku deployment fixing

in list Sprint 4 (04/05/22 > 27/05/22

Suggested

As a user, when I view the my values page after the quiz is complete, then I should be able to see fund recommendations, so that I may be able to find funds that align with my values.

in list Sprint 4 (04/05/22 > 27/05/22 👁

Members

JS ➕

Labels

Must have   **Tester - Peter**   ➕

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☑ Checklist

🕐 Dates

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Description   Edit

Most important user story to complete for this sprint. Now that we have consensus from client on fund calculation, we can implement this, like we have already done so for shares.

☑ **Acceptance Tests**   Hide checked items   Delete

100% ━━━━━━━━━━━━━━━━━━━━━━━━━

☑ ~~Given that I am have completed the quiz, when I view the my values page, then I should be able to see my top 5 recommended funds.~~

☑ ~~Given that I am viewing my top 5 recommended funds, when I compare them to my quiz values, then I should be able to see they are sorted in order of similarity.~~

Power-Ups

🔗 Dependencie

Story Points

As an admin, I want to be able to upload large amounts of share and fund data, so that I may populate my application's database with investments to compare investor's quiz values against.

in list Sprint 4 (🏃 04/05/22 > 27/05/22 👁

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Must have **Tester - Peter** ➕

☰ Description Edit

Client wants to upload 100k+-1m+ excel data rows for share and funds. Current design doesn't support this (exceeding memory cap for browser when trying to send a request for each row as we had it before).

☑ Acceptance Tests

Hide checked items Delete

100% ━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━

☑ ~~Given that I am on the data upload app, when I click the upload shares button, and attach a shares excel file with the appropriate template, then the data should be uploaded to the database without any lag and/or browser crashing.~~

☑ ~~Given that I am on the data upload app, when I click the upload funds button, and attach a funds excel file with the appropriate template, then the data should be uploaded to the database without any lag and/or browser crashing.~~

☑ ~~Given that I have successfully uploaded data on the data upload app (shares or funds), I should receive a notification of its success.~~

☑ ~~Given that I have unsuccessfully uploaded data on the data upload app (shares or funds), I should receive a notification of its failure.~~

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Power-Ups

- 🔗 Dependencies
- Story Points
- ➕ Add Power-Up

Automation

- ➕ Add button

Implement agreed upon calculation for funds table.

in list Sprint 4 (04/05/22 > 27/05/22 👁

Members　　**Labels**

[+]　| Must have | Tester - John | Backend | Task | [+]

Description

Add a more detailed description...

Tasks

[Hide checked items]　[Delete]

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☑ ~~On POST request to fundShare, aggregate sdg values after multiplying them by their weighting~~

☑ ~~Aggregration of values should be sent to funds during POST request to fundShare, NOT in fundShare. Do in save override method of fundShare.~~

Implement agreed upon parsing of funds excel template to funds table

in list Sprint 4 ( ) 04/05/22 > 27/05/22

Members

JS | | +

Labels

| Must have | Tester - Chris | Backend | Task | + |

≡ Description

Add a more detailed description...

☑ Tasks

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☑ ~~Read inserted excel file on upload funds button press~~

☑ ~~Parse titles of each column to the titles of columns for json body~~

☑ ~~Parse values under each column to the relevant column and row in the json body~~

Update frontend recommendation to handle funds overall SDGs for recommendations

in list Sprint 4 ( ) 04/05/22 > 27/05/22

Members

Labels

Must have   Tester - Chris   Front End   Task   +

≡ Description   Edit

Funds recommendation work

☑ Tasks   Hide checked items   Delete

100% ████████████████████████████

- ☑ ~~Get all funds data during navigation to my values pgae~~
- ☑ ~~Convert funds overall sdgs to 5p using 5p formula~~
- ☑ ~~Apply euclidean distance formula like was done for shares, to get distance values between user 5p values and fund 5p values~~
- ☑ ~~Sort by shortest to longest, display only 5~~

Suggested

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Power-Ups

Adjust POST and UPDATE requests on data upload app to send data in batches for Heroku deployment to work

in list Sprint 4 ( ) 04/05/22 > 27/05/22

Members

JS

Labels

Must have   Tester - Peter   Front End   Task   +

≡ Description

Add a more detailed description...

☑ Tasks   Hide checked items   Delete

100% ████████████████████████████

- ☑ ~~Change parsing of all excel data into one large json body to parsing them into smaller 1000 row sized bodies~~
- ☑ ~~Send each in a request after all data finishes parsing.~~

Suggested

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Power-Ups

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Adjust requests on frontend to only send data in lists, not individual dicts/JSON objects, to solve memory issues

in list Sprint 4 (👤) 04/05/22 > 27/05/22

Members

JS 🐕 +

Labels

Must have | Tester - Peter | Front End | Task | +

Description Edit

Needed to get around memory cap issue when sending too many requests at once.

Tasks

Hide checked items   Delete

100% ████████████████████████

- [x] ~~Change data upload parsing to add excel data to json data to a list, not save them individually as dicts~~
- [x] ~~After 1000 dicts in one list, move onto next list and store the previous list locally~~
- [x] ~~Send all json lists after parsing finishes~~

Suggested

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Story Poir

Database documentation tasks

in list Sprint 4 (04/05/22 > 27/05/22

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Labels

Should Have | Tester - Jose | Task | +

Description

Add a more detailed description...

Tasks

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- ☑ ~~Update ERD with new table changes~~
- ☑ ~~Document changes in table documentation~~

Limit data upload app to only allow posting up to 2000 share and 2000 fund rows.

in list Sprint 4 (👤) 04/05/22 > 27/05/22

Members

JS ➕

Labels

`Should Have` `Tester - Chris` `Front End` `Task` ➕

Description Edit

This was required because of the limitation on the cloud infrastructure (Heroku) only allowing up to 10k rows total in a db at a time on the free plan. Until the plan is upgraded or a different solution found, this limitation must stay.

This was also implemented because GET requests on the frontend take far too long on this plan to fetch large amounts of data, and by design all the funds and share data needs to be fetched in full during this process. (Completing the batch GET request unfinished task will solve this not working at all, but it will still take way too long to be acceptable for a user of the app).

☑ Tasks   Hide checked items   Delete

100% ━━━━━━━━━━━━━━━━━━━━━━━━━━

☑ ~~On data upload app, limit the number of rows that are parsed to 2000 in share and fund templates.~~

Suggested

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Power-Ups

🔗 Dependencies

Deploy updated changes to Heroku

in list Sprint 4 (👥 04/05/22 > 27/05/22 👁

Members

JS +

Labels

Should Have **Tester - Jose** **Front End** **Backend** **Task** +

Description Edit

Initially completed, but when the bulk upload requirement was needed, the fourth task was added, until we had to implement the limitation on the number of shares/funds allowed to be posted.

☑ Tasks

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☑ ~~Deploy data upload app with all changes from this sprint~~

☑ ~~Deploy finappster frontend with all changes from this sprint~~

☑ ~~Deploy finappster backend with all changes from this sprint~~

☑ ~~Redeploy after implementing share and fund limitations based on above task~~