

PAT Project Timeline

This document will list a high level timeline for this project. Our main goal is to have an MVP (minimal viable product) ready before the start of summers hiring season (mid-january). This gives us October, November, Decemeber, January. After a working piece of software is deployed we can look to improve it.

Deliverables

End of Month achievements are listed here

OCTOBER: A functional BackEnd API (holdings, metrics) and a FrontEnd mock up pages, functional but disconnected

NOVEMBER: A staging site with functional auth, portfolio management, charts and metrics

DECEMBER: A staging site with secondary features included, and a DB with live-updating data

JANUARY: A deployed MVP fulfilling all the requirements in the design document

Month to Month Workflow

September (setting things up)

- Define requirements & user stories
- Decide on tech stack
- Design prototypes / mock ups
- Assign roles

October (core development)

- Backend : API endpoints, database schema, authentication, core business logic
- Core Business Logic : user can add holdings, see their chart, and basic metrics
- Database : Collect data up to a certain date, keep the financial data static
- Frontend : Core pages (Landing page, Portfolio Manager, Holdings Manager, Tool Viewer), state management

November (Integration)

- UI integration with the backend
- Bug fixes, QA testing of the basic features
- Set up for secondary features

December (Expansion)

- Add RDCF, Risk, Benchmarking, and What if
- Financial information Database is now being updated regularly (once per day min)

January (Polish & Launch)

- Bug Fixes
- QA Automation
- Deployment Docs

Roles

BackEnd --> APIs, DB Schema

FrontEnd --> Pages, components, state management

Model Development --> Metric computation

PM --> Keep scope aligned, run bi-weekly meetings