Tab 1

**System Service Request (SSR)**

**Project Proposal**

1. **Project Details**

**Project Name:** SmartBudget Dashboard

**Departments Affected:** IT Development, Financial Services, Student Success Office

**Date Submitted:** October 8, 2025

1. **Project Sponsor(s)**

**Name:** Anthony Rodriguez

**Contact information**: [rodrig99@miamioh.edu](mailto:rodrig99@miamioh.edu)

1. **Problem Statement**

Students and young professionals frequently struggle with financial literacy, expense tracking, and budget discipline. Existing tools (e.g., PocketGuard, EveryDollar) are either too complex, too generic, or lack real-time customization, leading to poor financial habits and overspending.

1. **Project Description**

This project proposes the development of a web-based personal finance dashboard that enables users to track expenses, categorize spending, set savings goals, and receive real-time alerts. The MVP will focus on simplicity, customization, and actionable insights to build consistent financial management habits.

1. **Project Justification**

This project is necessary to address the market gap for a free, accessible budgeting tool tailored to the needs of early-career users. It supports the mission of improving financial literacy and decision-making for this critical demographic.

* 1. **How will you measure if this project is successful?**

Success will be measured by the delivery of a fully functional MVP dashboard by the deadline of December 7, 2025, demonstrating all core features (expense tracking, alerts, visualizations) and the creation of full project documentation.

* 1. **Summarize the major benefits**

Major benefits include improved user financial awareness (intangible) and a quantifiable reduction in overspending among initial test users (tangible). The MVP provides a low-cost, open-source-based solution.

* 1. **Does this project support the organizational strategic plan?**

Yes. This project supports the strategic plan of the CIT 276 course by delivering a complete software system artifact, demonstrating proficiency in the full development life cycle (SDLC).

1. **Alternatives Considered**

Alternatives considered included using off-the-shelf software (spreadsheets or existing complex apps). The impact of no action would be the continuation of poor manual financial tracking, persistence of the problem statement, and failure to meet the course deliverable requirements. A mobile application could also be developed, but that would increase development time.

1. **Timeline**

**Duration:** October 6 – December 7, 2025  
**Milestones:**

Oct 10: Initial research and requirements complete

Oct 24: Database and backend structure finalized

Nov 7: Frontend and backend MVP components built

Nov 24: Core features (tracking, categorization, alerts) operational

Dec 7: MVP tested, refined, and documented

1. **Resource Requirements**

The expected budget is low, leveraging free and open-source software (React, Flask, Firebase). The primary resource is my time and skill-level. Cost Overruns will be covered by re-scoping optional features or extending development sprints.

**Project Approval Information**

Reviewer:

Date of Review:

| **Recommendation** |
| --- |

* This proposal is approved.
  + Highest priority - Critical, greatest impact overall or best value
  + Moderate priority - Important but may have some limitations or aspects are unclear
  + Low priority - Useful, but of limited applicable value or narrow utility
* This proposal is approved with these questions or concerns:
* This proposal is **not** approved, for these reasons: