Meeting Minutes: Project Idea Pitch Session

Project Title:

Personal Finance Tracker - A Web-Based Financial Management Tool

Date of Meeting:

Sep 20, 2024

Time of Meeting:

10 pm

Location:

Online Discord Call

Participants:

- Sai Pranav Sripathi (SJSU ID: 018188677)
- Varshan Kumar (SJSU ID: 017099368)
- Kumari Shyama (SJSU ID: 018231512)
- Prasanna Sai Rohit Durbha (SJSU ID: 018230693)
- Abhishek Rasikbhai Shekhada (SJSU ID: 017609475)

Agenda:

1. Brainstorming project ideas and potential applications.
2. Evaluating the feasibility and relevance of each idea.
3. Selecting the final project idea for implementation.
4. Outlining next steps and responsibilities.

Discussion Notes:

1. Brainstormed Project Ideas:

- **Personal Finance Tracker:**
  - Focus on helping users manage finances effectively.
  - Features: budgeting, transaction categorization, financial goal setting, graphical reports.
- **Health and Fitness Tracker:**
  - Tracks user fitness goals and routines.
  - Includes calorie tracking and workout recommendations.
- **Academic Scheduler:**

- ○ A system to help students plan and organize coursework.
- ○ Features: reminders, assignment deadlines, and grade tracking.
- **Inventory Management Tool for Small Businesses:**
  - ○ Tracks stock levels, sales, and supply orders.
  - ○ Integrates with accounting tools.

2. Evaluation of Ideas:

- **Personal Finance Tracker:**
  - ○ Feasible within project scope and aligns with database-centric course objectives.
  - ○ Broad user base: individuals, families, and small businesses.
- **Health and Fitness Tracker:**
  - ○ Requires integration with APIs (e.g., fitness devices), making it complex for this timeline.
- **Academic Scheduler:**
  - ○ Functional but overlaps with widely available tools, less unique.
- **Inventory Management Tool:**
  - ○ Viable, but the target audience is more niche compared to the finance tracker.

3. Decision:

- The team unanimously agreed to develop the **Personal Finance Tracker** as it offers a practical application of database systems and serves a diverse audience.

Action Items:

Task	Assigned To	Deadline
Finalize the project scope and features	Entire Team	Sep 26, 2024
Begin research on similar applications	Entire Team	Oct 1, 2024
Draft project proposal for approval	Entire Team	Sep 26, 2024

Next Meeting:

September 20, 2024
Focus: Present the finalized scope and create the project proposal.

Meeting Minutes: Project Proposal Development

Date of Meeting:

Sep 20, 2024

Time of Meeting:

10 pm

Location:

Online Discord Call

Participants:

- Sai Pranav Sripathi (SJSU ID: 018188677)
- Varshan Kumar (SJSU ID: 017099368)
- Kumari Shyama (SJSU ID: 018231512)
- Prasanna Sai Rohit Durbha (SJSU ID: 018230693)
- Abhishek Rasikbhai Shekhada (SJSU ID: 017609475)

Agenda:

1. Finalize the project objective and scope.
2. Define core features and system functionalities.
3. Select tools and technologies for implementation.
4. Establish milestones and deliverables.
5. Assign responsibilities for proposal sections.

Discussion Notes:

1. Finalizing Project Objectives:

- **Objective:** To create a user-friendly Personal Finance Tracker that empowers users to manage their finances effectively, offering features like transaction recording, budgeting, and financial goal tracking.
- **Target Audience:** Individuals, families, students, and small businesses.

2. Core Features and System Functionalities:

- **Essential Features:**
    - Transaction management (add, categorize, and filter transactions).
    - Budget tracking and notifications for budget limits.
    - Financial goal setting and progress tracking.
    - Graphical financial analysis (e.g., pie charts, spending trends).

- **Additional Features:**
  - Notifications for low balances or upcoming payments.
  - Filtering and sorting transactions by date and category.

3. Tools and Technologies:

- **Frontend:** HTML, CSS, JavaScript.
- **Backend:** Flask (Python-based).
- **Database:** MySQL.
- **Visualization Tools:** Chart.js or D3.js for graphical representations.
- **Development Tools:** MySQL Workbench, Figma for wireframes.

4. Milestones and Deliverables:

- **Proposal Submission:** Final draft by [Insert Deadline].
- **System Design:** ERD and normalized database schema by [Insert Date].
- **Frontend/Backend Development:** Initiated post-proposal approval.
- **Testing and Deployment:** Final phase post-feature integration.

5. Responsibilities:

- **Abstract and Introduction:** Sai Pranav Sripathi.
- **System Features and Use Cases:** Varshan Kumar.
- **ER Diagram and Database Schema:** Kumari Shyama.
- **Technical Specifications:** Prasanna Sai Rohit Durbha.
- **Formatting and Final Review:** Abhishek Rasikbhai Shekhada.

Action Items:

Task	Assigned To	Deadline
Complete assigned proposal sections	All team members	Sep 26, 2024
Compile and format the proposal	Abhishek Rasikbhai Shekhada	Sep 26, 2024
Submit the final proposal	Team lead (Sai Pranav Sripathi)	Sep 26, 2024

Next Meeting:

November 15, 2024
Focus: Setup the project skeleton

Meeting Minutes: Project Kickoff

Project Title:

Personal Finance Tracker - A Web-Based Financial Management Tool

Date of Meeting:

Nov 15, 2024

Time of Meeting:

10 pm

Location:

Online Discord Call

Participants:

- Sai Pranav Sripathi (SJSU ID: 018188677)
- Varshan Kumar (SJSU ID: 017099368)
- Kumari Shyama (SJSU ID: 018231512)
- Prasanna Sai Rohit Durbha (SJSU ID: 018230693)
- Abhishek Rasikbhai Shekhada (SJSU ID: 017609475)

Agenda:

1. Confirm project goals and objectives.
2. Review the finalized project proposal and scope.
3. Assign roles and responsibilities.
4. Set up project tools and development environment.
5. Outline the immediate tasks and project timeline.

Discussion Notes:

1. Project Goals and Objectives:

- Reaffirmed the goal to create a scalable, user-friendly Personal Finance Tracker.
- Highlighted features to focus on during the initial phase:
    - Transaction management.
    - Budget tracking.

○ Financial goal setting.

2. Review of Proposal and Scope:

- Revisited the finalized proposal to ensure alignment with objectives.
- Discussed prioritizing features for the initial build:
  ○ Core functionalities like transaction recording and visualization tools.

3. Roles and Responsibilities:

- **Team Lead:** Sai Pranav Sripathi (overseeing progress and coordinating tasks).
- **Database Design and Backend Development:** Kumari Shyama and Prasanna Sai Rohit Durbha.
- **Frontend Development:** Varshan Kumar and Abhishek Rasikbhai Shekhada.
- **Documentation and Testing:** Abhishek Rasikbhai Shekhada.

4. Project Tools and Environment:

- **Version Control:** Set up a GitHub repository for collaboration.
- **Development Environment:** Flask for the backend and MySQL for the database.
- **Wireframing and Design Tools:** Figma for UI/UX prototyping.
- **Communication Tools:** Slack for team discussions and updates.

5. Immediate Tasks and Timeline:

- **Week 1:**
  ○ Finalize ERD and database schema.
  ○ Create wireframes for key pages.
- **Week 2:**
  ○ Begin backend and frontend integration.
  ○ Implement basic CRUD operations.
- **Week 3:**
  ○ Develop and test core features (transaction management).
- **Week 4:**
  ○ User acceptance testing for the initial build.

Action Items:

Task	Assigned To	Deadline
Set up the GitHub repository	Varshan Kumar	Nov 15, 2024
Finalize ER Diagram and database schema	Kumari Shyama	Nov 25, 2024

Research libraries for visualizations	Abhishek Rasikbhai Shekhada	Nov 25, 2024
Test development environment setup	Entire Team	Dec 2, 2024

Next Meeting:

December 1, 2024
Focus: Review progress on ERD and setup the website and database.

Meeting Minutes: Website and Database Development

Project Title:

Personal Finance Tracker - A Web-Based Financial Management Tool

Date of Meeting:

Nov 30, 2024

Time of Meeting:

10 pm

Location:

Online Discord Call

Participants:

- Sai Pranav Sripathi (SJSU ID: 018188677)
- Varshan Kumar (SJSU ID: 017099368)
- Kumari Shyama (SJSU ID: 018231512)
- Prasanna Sai Rohit Durbha (SJSU ID: 018230693)
- Abhishek Rasikbhai Shekhada (SJSU ID: 017609475)

Agenda:

1. Plan the website architecture and user interface.
2. Finalize the database schema and relationships.
3. Discuss integration between frontend, backend, and database.
4. Assign development tasks and set milestones.

Discussion Notes:

1. Website Architecture and UI Design:

- **Frontend Frameworks and Tools:**
  - Technologies: HTML, CSS, JavaScript.
  - Libraries: Bootstrap for responsive design and Chart.js for visualizations.
- **Wireframe Review:**
  - Reviewed wireframes designed in Figma for key pages:
    - Login/Signup Page.
    - Dashboard (overview of accounts, transactions, and budgets).
    - Transaction Management Page.
    - Budget and Goals Page.

- **User Experience (UX) Goals:**
  - Ensure seamless navigation and intuitive design.
  - Implement responsive design for compatibility across devices.

2. Database Schema and Relationships:

- **Entities and Tables:**
  - Users, Accounts, Transactions, Budgets, Goals.
- **Relationships:**
  - A user can have multiple accounts.
  - Each account can have multiple transactions.
  - Budgets and goals are linked to user accounts.
- **Normalization:**
  - Ensured the schema was in Third Normal Form (3NF) to minimize redundancy.
- **Integrity Constraints:**
  - Primary keys for unique identifiers.
  - Foreign keys to enforce relationships.

3. Frontend-Backend-Database Integration:

- **Backend Framework:** Flask (Python) to handle requests and interact with the database.
- **API Endpoints:**
  - Defined endpoints for CRUD operations:
- **Database Queries:**
  - Used MySQL queries for data retrieval and updates.
  - Created stored procedures for repetitive tasks like updating account balances.

4. Development Task Assignments:

- **Frontend Development:**
  - Login/Signup Page: Varshan Kumar.
  - Dashboard and Graphical Reports: Abhishek Rasikbhai Shekhada.
- **Backend Development:**
  - User authentication and session management: Sai Pranav Sripathi.
  - API endpoint implementation: Prasanna Sai Rohit Durbha.
- **Database Development:**
  - Schema design and table creation: Kumari Shyama.
  - Stored procedures and triggers: Prasanna Sai Rohit Durbha.

Action Items:

Task	Assigned To	Deadline

Finalize database schema and implement tables	Kumari Shyama	December 1, 2024
Design and implement Login/Signup Page	Varshan Kumar	Dec 3, 2024
Develop Flask API for user authentication	Sai Pranav Sripathi	Dec 3, 2024
Research and implement Chart.js visualizations	Abhishek Rasikbhai Shekhada	Dec 3, 2024
Create stored procedures for account updates	Prasanna Sai Rohit Durbha	Dec 3, 2024

Next Meeting:

December 5, 2024
Focus: Finish the project and all documentation.

Meeting Minutes: Final Submission Day

Project Title:

Personal Finance Tracker - A Web-Based Financial Management Tool

Date of Meeting:

Dec 5, 2024

Time of Meeting:

12 pm

Location:

Interdisciplinary Science Building

Participants:

- Sai Pranav Sripathi (SJSU ID: 018188677)
- Varshan Kumar (SJSU ID: 017099368)
- Kumari Shyama (SJSU ID: 018231512)
- Prasanna Sai Rohit Durbha (SJSU ID: 018230693)
- Abhishek Rasikbhai Shekhada (SJSU ID: 017609475)

Agenda:

1. Final review of the project deliverables.
2. Validate all functionality and ensure all features are operational.
3. Submit the final project report and deliverables.
4. Reflect on the project process and discuss lessons learned.

Discussion Notes:

1. Final Review of Deliverables:

- **Key Features Reviewed:**
    - Transaction management.
    - Budget and goals tracking.
    - Financial insights with dynamic charts.
    - User authentication and account management.
- **System Testing:**
    - Confirmed all unit tests, integration tests, and user acceptance tests were successful.
    - Verified database integrity and consistency.

2. Functionality Check:

- Reviewed the live version of the application to ensure:
  - Smooth navigation across all pages.
  - Responsive design compatibility across devices.
  - Real-time data updates and notifications.

3. Submission of Deliverables:

- **Submitted Items:**
  - Final project report including the abstract, methodology, and features.
  - Complete source code for frontend, backend, and database.
  - Presentation slides summarizing the project.
  - User manual/documentation for application usage.
- **Submission Confirmation:**
  - Verified successful submission on [Insert Submission Platform/Link].

4. Reflection and Lessons Learned:

- **Challenges Faced:**
  - Debugging API endpoints and ensuring cross-platform compatibility.
  - Managing workload and timelines among team members.
- **Key Learnings:**
  - Effective communication and clear role assignments improve collaboration.
  - Importance of thorough testing and documentation.
- **Team Appreciation:**
  - Acknowledged everyone's contributions and effort throughout the project.

Action Items:

Task	Assigned To	Deadline
Submit all deliverables to the instructor	Sai Pranav Sripathi	Dec 5, 2024
Archive project files in team repository	Varshan Kumar	Dec 5, 2024
Prepare for project presentation	Entire Team	Dec 5, 2024