**Software Project Management Plan**

**Finance App**

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**Team Members**

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Document Control

**Change History**

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**Document Owner**

Ali Alsagri is responsible for developing and maintaining this document.

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# Overview

## Purpose and Scope

We are interested in creating a .Net application that will be useful for the financial stakeholders and give financial stakeholders visibility in the growing field of web applications. Our application will give the stakeholders to grab clients more effectively and give good quality of service.

The application will provide stakeholders the ability to log in to their agent portal. In this application the agent gets access to register the customers for their product and forward the application to the approval team of the particular vendor.

The user interface will be intuitive and simple to navigate, with 95% of new users being able to use the application without referencing the user manual. A user guide and system administration manual will be provided.

## Goals and Objectives

The overall objective is to give agents a way to keep track of their applications.

Project Goals:

1. Create an application that functions as expected, looks great.
2. Give agent visibility in the mobile application environment.
3. Learn about software engineering and creating a web applications.

Project Objectives:

1. Create a web application to give agents / customers access to their account information.
2. Create an application that functions in a simple manner.
3. Provide agents with full access to use their accounts to register the customers.

## Project Deliverables

|  |  |
| --- | --- |
| **Date** | **Deliverable** |
| 09/23/10 | Requirements Specification |
| 09/28/10 | Project Plan |
| 11/02/14 | Iteration #1 |
| 11/12/14 | Iteration #2 |
| 11/25/14 | Iteration #3 |
| 12/03/14 | Iteration #4 |
| 12/07/10 | Iteration #5 |
| 11/11/10 | Test Report |

## Assumptions and Constraints

### Assumptions

1. UMKC terminals are available and function when we need them.
2. Remote MAC Lab will allow our programmers to work away from UMKC.
3. Interfacing the app with a proxy server and third-party website is feasible.

### Constraints

Constraints:

1. This application will run on any bowser.
2. Application restrains to a particular financial institution.
3. Gathering the customer information.

## Success Criteria

A working prototype, which is easy to use, that allows users to check their Application.

# Startup Plan

## Technical Process

An iterative and incremental development process is planned. Feedback will be used from each iteration to improve the next. The first iteration will focus on basic functionality of the application. Subsequent iterations will build upon that and incorporate more features as time allows.

## Tools

* Programming – .Net, SQL, MVC
* Operating System – Windows, Mac
* Version Control – all work products will be stored in an SVN repository

# Work Plan

## Resource Estimate

Detailed resource estimates are available in the team effort table.

In this document, tasks, roles, owners, and effort estimates & actuals are listed.

## 

## Iteration Plans

A detailed iteration plan will be provided for Iteration 1. Further task details are available in the schedule.

### First Iteration

The purpose of this iteration is to create a working skeleton of the system. The system is divided into three components namely User Interface, Middle-ware(ASP.NET), and a database to store information.

### Second Iteration

The purpose of this iteration is to work with the customer information, providing him to add account details, modify details, request sales representative to get best quotes from the vendors. At the end of this iteration, stakeholders should be able to: Create, Login and manage their account

### Third Iteration

The purpose of this iteration is to create an application form filled by sales representative. Design the Database required to store the application details. Fill the application with the details provided by the customer and submit to the vendor.

### Fourth Iteration

The purpose of this iteration is to integrate frontend with the database to update the application details.

### Fifth Iteration

The process of testing involves Functionality testing, Usability testing, and Interface testing. Functionality testing is done to ensure whether all the links are working or not, the form data is submitted correctly or not. Interface testing is done to ensure all the data entered in the forms are stored in database in the correct or required order.

### Final Product

Proxy server interfaces with the facebook web page containing Roo Bucks merchant locations. Mobile iOS application interfaces with the proxy server, giving users the ability to see these locations.

# Control Plan

## Configuration Management Plan

The following procedure is to be used when making changes to all baselined work products:

1. All project work products will be stored in a centralized SVN repository running on a central server.
2. All baselined documents will have a Document Control section with a change history to track initialization and subsequent changes.
3. All project work products (documents, source code, test cases, program data, test data, etc). Only the system requirements, project plan and source code will be baselined and under configuration control.
4. Items that are subject to change control will be considered baselined after a group review at the end of the initial document creation.
5. The change control procedure once a product is baselined is:

(1) anyone wanting to make a change to a baselined item sends an email to the rest of the team and project sponsor describing the change, reason for the change, expected schedule impact, and time line for integrating the change.

(2) if no one responds to the group within 2 days with a reason for why the change request shouldn't be permitted, it will be considered accepted and the person proposing the change may proceed with the change.

1. if anyone does object to the change, the reason for objecting will be discussed at a meeting where everyone is invited to attend and voice their opinion. At the end of the meeting a democratic vote will be held to decide whether or not the change should be allowed.
2. if a change takes place, the initiator must collaborate with the project manager to update the schedule

# Supporting Process Plans

## Test Plan

The test plan defines the items that will be tested, methods for testing, and a schedule detailing the tasks, owners, and time line.

The test plan will be available in a separate document.

## Product Acceptance Plan

At the conclusion of each iteration, the prototype created will tested to ensure it meets the requirements of that iteration. An environment such as the iPhone simulator may be used to test functionality in lieu of the app being loaded on an actual smartphone.

For the final iteration, product acceptance testing will ensure that the prototype functions as expected with a user's data.