# **CSC154 Software Development**

# **Project Overview Template**

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**Project Name: Personal Finance & Budget Tracker**

**Team Number: Group 2**

**Project Manager: Ricardo Robinson**

**Mentor: Heber Romero**

**Team Members:** **Duncan Matthews,** **Brian Balderas-Ortega,**

**Marwan Lebbos,** **Hans Gonzalez,** **Garrett Ellington**

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## **Project Objective**

The primary goal of our Expense Tracking App is to help businesses efficiently track their expenses for tax and reporting purposes. The app will provide users with a clear understanding of their financial situation through categorization, visualization, and analytics.

1. **Project Scope**

* User account creation and authentication
* Income and expense tracking with categorization
* Monthly and yearly budget goal setting
* Visual reports for spending trends
* Simple alerts for budget limits

## **Team Collaboration and Documentation Tools**

* GitHub for version control of documents that require coding/need to be made over multiple weeks within a sprint.
  + A GitHub repository has been created for items that will need version control.
  + Branches will be created and merged so that no one accidentally overwrites each other.
* Microsoft Teams for communication and meetings.
  + Weekly Teams calls will be held to ensure the majority of the team are on the same page and are aware of the work needed by the end of the week.
  + Notes will be taken and a post made to keep members informed if they are unable to come to the meeting.
* Trello for notifications and keeping track of work needing to be completed.
  + A Trello board will be made this week to ensure that all items needing to be completed are tracked.
  + This will allow us to see the progress that the team makes throughout the week.

## **Project Management Plan and Methodologies**

* Specify what project management methods and tools will be used in this project development.
* In this project, a mix of Agile and Scrum methodologies will be used for flexible iterative development.
* Trello will be used for task management and tracking backlogs
* Describe how your group will use these project management methods and tools during this project development.
* Agile will be used on development and delivering small, functional pieces of the project regularly, allowing for responses to changes and feedback efficiently.
* Scrum will provide the structure to manage and track the project’s progress.
* Trello will help track and manage backlogs, monitor progress, and allow tasks to be created and assigned.

1. **Project Timeline**

*Sprint 1 - Project Selection and Development Plan*

* 2/10/2025 - 03/16/2025
* Tasks:

- Team kickoff meeting (Teams)

- Gathered project requirement

- Project management plan

*Sprint 2 – Project Requirements Specification*

* 3/03/2025 - 3/16/2025
* Tasks:

- Team meeting

- Collecting User stories

- Completing and submitting project requirements specification,

version 1

*Sprint 3: Project High-level Design*

* 3/24/2025 – 4/06/2025
* Tasks:
* Analyzing project architecture
* Caring out high-level design

- Submitting high-level design, version 2

*Sprint 4: Project Presentation and Evaluation*

* 4/07/2025 - 5/047/2025
* Task:

- Completing and submitting project presentation

- Presenting the group project

- Completing and submitting self and peer evaluations

1. **Project Deliverables**

* Weekly Project Progress Reports (Project Manager)
* Project Overview Documentation (Sprint 1)
  + Project management plan
  + Research and project selection
* Project Software Requirements specification documentation, Version 1 (Sprint 2)
  + User stories and project requirements
* Project Software Requirements specification documentation, Version 2 (Sprint 3)
  + High level design and project architecture
* Project Presentation Documentation (Sprint 4)
  + Documenting and presenting a presentation of our project
* Self and Peer Evaluations (Sprint 4)