EECS 2311 Group 17 - Student Budget and Expense Tracker

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Student Budget and Expenses Tracker - Vision Statement

The Student Budget and Expenses Tracker is a simple budgeting app made for university students that helps them manage and understand their finances across academic terms rather than traditional monthly budgets.

The Student Budget and Expenses Tracker is designed specifically for post-secondary students who want a simple and practical way to manage their money during the school year. Unlike most budgeting applications that are built around monthly financial cycles, this system is organized around academic terms, which better reflect how students actually receive and spend money during a semester.

The main users of this system are undergraduate and graduate students who manage their own personal finances and want a clearer and more realistic view of their spending throughout a school term. The application allows students to record expenses using specific categories such as tuition, rent, food, textbooks, and subscriptions, and to associate each expense with a particular academic term.

One of the main strengths of the system is that it separates high impact school expenses, such as tuition, textbooks, and lab materials, from everyday spending. This makes it easier for students to clearly see how much of their money is going directly toward school. The tracker is also designed to reflect how students usually receive money, such as loans, scholarships, or family support, which they often get at the beginning of the semester.

The application also helps students understand how their spending changes during important academic periods, such as midterms or final exams, when costs often increase due to food, transportation, or course-related purchases. In addition, students can use a simple planning mode to list expected academic expenses before the semester begins, helping them prepare for large upcoming costs.

Finally, the system provides short and easy to understand summaries intended to be shared with a financial advisor or family member. This is especially helpful for students who rely on external financial support and need a way to explain how their money is being used during the term.

The project will be considered successful if:

- students are able to record their expenses and organize them by academic term and student specific categories such as tuition, rent, food, and textbooks,

- the system correctly calculates total spending and remaining balance for a selected term,

- the system clearly indicates when a student is over budget for a term,

- students are able to see high-impact academic expenses separately from everyday spending,

- students can view simple summaries that help them understand how their spending changes during a semester,

Big User Stories

Big Story 1 – Term-based expense tracking

As a student**,** I want to record and view my expenses by academic term, so that I can clearly understand how I spend my money during each semester.

Priority: High
 Cost: 8 days

Big Story 2 – Term budgeting and spending insights

As a student**,** I want to see summaries of my spending and whether I am staying within my term budget, so that I can manage my money and avoid running out before the semester ends.

Priority: High
 Cost: 7 days

Big Story 3 – Student-focused planning and goals

As a student**,** I want to plan and track important school-related expenses and savings goals during a term, so that I can prepare for large academic costs like tuition and textbooks.

Priority: Medium
 Cost: 6 days

Big Story 4 – Multi-term review and reporting

As a student**,** I want to review and compare my spending across different academic terms and generate simple reports, so that I can reflect on my habits and share summaries with an advisor or family member.

Priority: Medium
 Cost: 6 days

PROJECT SCOPE SECTION

Unique customized features/ selling points:

Term cash-flow view (not just totals)
 Students can see how their money is spread across the term (early term vs midterm season vs exam period), so they can clearly tell when their spending spikes during busy school weeks.

Big school expense planning
 The app lets students mark certain expenses as *planned academic costs* (like tuition, books, lab fees), so these don't feel like random expenses and can be prepared for ahead of time.

International student support mode
 Students can tag expenses as "school country" vs "home country" spending (for example travel, remittances, or exchange-related costs), which helps international students better understand their real term budget.

Term survival indicator
 Instead of only saying "over budget", the system can show a simple message like:
 "At this rate, your money may not last until the end of the term."
 This directly matches how students think ("Will I survive this semester?").

Advisor-friendly report view
 The export summary is formatted specifically so a student can easily show it to a financial advisor, sponsor, or school support office without needing to explain the data.

Course-related spending insight
 Students can optionally link expenses to a course (for example, textbooks, lab kits, or online tools), so they can see which courses are costing them the most outside tuition.

High-level feature categories (Big User Stories)

1. Term-based expense tracking (ITR1)

Big story

As a student, I want to record and view my expenses by academic term, so that I can clearly understand how I spend my money during each semester.

Smaller user stories

- Add a new expense to a selected academic term (Iyinoluwa Blossom Olu-Alabi)
    - The system must allow a user to select an active academic term (e.g., "Winter 2026") and input a new expense entry. The entry must include a numeric amount, a description (e.g., "Math Lab Kit"), and a specific date within the term's range.
    - Unanswered questions:
        - Should the system allow users to enter expenses for dates that fall outside the defined term start/end dates?
        - Will the system support multiple currencies if the student is an international student?

- Assign a category to an expense (Ayesh Ahmed)
    - When creating or editing an expense, the user can select a category from a predefined list (Tuition, Rent, Food, Textbooks, Subscriptions, etc.) to enable future reporting.
    - Unanswered questions:
        - Can a user add "Custom Categories" if the defaults don't fit their needs?
        - Can one expense have multiple categories?

- Edit or remove an existing expense (Arvin Gholipoor)
    - Users need a way to correct data entry errors or delete accidental duplicates. Selecting an expense from a list should open a form with its current data pre-populated for modification.
    - Unanswered questions:
        - Should users be prompted to confirm deletions to avoid accidental data loss?
        - Should removed expenses be held somewhere temporarily for easy recovery?

- View all expenses for a selected term (Dexter Sargent)
    - The user should be able to see a chronological list of all recorded expenses within a chosen academic term. This view should display the total sum of these expenses at the bottom.
    - Unanswered questions:

- Should the list be sorted by date (newest first) or by the highest dollar amount by default?
- Should the user be able to change the way that options are sorted and filtered?
- Should there be a search bar?

- View expenses grouped by category for a term (Dexter Sargent)
  - This view should aggregate all spending by category (e.g., seeing a single total for "Food") rather than a list of individual transactions.
  - Unanswered questions:
    - Should this be a text-based list or include a basic visual chart (like a progress bar) for each category?
    - How do we handle categories that have $0 in spending? Should they be hidden or shown as empty?

2. Term budgeting and spending insights (ITR2)

Big story

As a student, I want to see summaries and insights for my spending in a term, so that I can manage my money and avoid running out before the semester ends.

Smaller user stories inside this category

- View total spending for a selected academic term

- Enter a planned term budget or income

- See remaining balance for the term

- Receive an over-budget warning when spending exceeds the term budget

- See a simple spending breakdown for the term (by category)

3. Student-focused planning and goals (ITR3)

Big story

As a student, I want to plan and track important school-related costs and goals during a term, so that I can prepare for large academic expenses.

Smaller user stories inside this category

- Mark expenses as major school costs (tuition, textbooks, lab fees, online tools, etc.)

- Set a savings goal for an academic term

- Track progress toward the term savings goal

- View upcoming planned academic expenses within a term

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4. Multi-term review and reporting (ITR3)

Big story

As a student, I want to review and compare my spending across different academic terms and export summaries, so that I can reflect on my habits and share them with an advisor or family member.

Smaller user stories inside this category

- Compare total spending between two academic terms

- View category-level differences between terms

- Export a term summary report

- Generate an advisor-friendly report view