

EECS 2311 Group 17 - Student Budget and Expense Tracker

Ayesh Ahmed
Iyinoluwa Blossom Olu-Alabi
Arvin Gholipoor
Dexter Sargent

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.

Most budgeting applications are built around monthly financial cycles. However, university students do not operate on monthly financial patterns. Students typically receive the majority of their funding at the beginning of an academic term (loans, scholarships, family support), and then spend gradually throughout the semester, with spending spikes during midterms, finals, and major academic deadlines.

This system is designed specifically for undergraduate and graduate students who want a clearer and more realistic way to understand their finances. Instead of tracking spending month-by-month, this application organizes financial activity by academic term (e.g., Fall 2026, Winter 2027).

Students can record expenses and associate them with a specific academic term and category, such as tuition, rent, food, textbooks, subscriptions, and other school-related costs. The system separates high-impact academic expenses from everyday spending so students can clearly see how much of their money is going directly toward school.

The tracker also allows students to plan ahead by listing expected academic expenses before the term begins. This helps students prepare for large costs such as tuition payments, textbooks, lab fees, or course-related materials.

Additionally, the system generates simple, easy-to-understand summaries that can be shared with financial advisors, sponsors, or family members. This makes it easier for students who rely on external support to communicate how their money is being used during the term.

The project will be considered successful if students can easily record their expenses by academic term, clearly see how much they've spent, and understand how much money they have left for the semester. The system should show when a student is going over budget, separate major school costs from everyday spending, and run smoothly without errors. Overall, the goal is for students to actually feel more in control of their money during the term.

Big Stories

Term - Based Expense Tracking

As a student I want to record and view my expenses by academic term.

Priority: high

Cost: 8 days

Term Budgeting and Spending Insights

As a student I want to set a budget for an academic term and see how much I have spent.

Priority: high

Cost: 7 days

Student Focused Planning and Goals

As a student I want to mark important academic expenses and set saving goals during a term.

Priority: Medium

Cost: 6 days

Term Review and Advisor Reporting

As a student I want to compare my spending across different academic terms and generate summaries.

Priority: Medium

Cost: 6 days

User Stories.

Add expense to selected academic term

As a student, I want to add a new expense to selected academic term, so that I can accurately track my spending during that semester.

Acceptance Criteria

- The user can enter:
 - ① Amount ② description
 - ③ Category ④ Date ⑤ Academic term
- The expense is saved in the system
- The expense appears when viewing the term
- Amount > 0.

Priority: high

Cost: 3 days

Assign Category To An Expense

As a student, I want to assign a predefined category to each expense.

Acceptance Criteria:

- There is a predefined category
- A category must be selected when adding an expense.
- Expenses can be filtered by category

Priority: high

Cost: 1.5 days

Delete Expense

As a student I want to delete an expense so that I can remove accidental entries.

Acceptance Criteria

- The user can select an expense to delete.
- The expense is removed
- The term total updates after deletion

Priority: Medium

Cost: 1 day

Edit Existing Expense

As a student I want to edit an expense I have added.

Acceptance:

- The user can modify fields and save changes
- The updated values replace the old values
- Invalid edits are rejected.

Priority: Medium

Cost: 1.5 days

View Expenses For a Selected Term

As a student, I want to view all recorded expenses within a term.

Acceptance Criteria

- Expenses are displayed
- Only expenses for the selected term are displayed

Priority: High

Cost: 2 days

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
-

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

