Additional Requirements & Information

The purpose of this document is to provide additional information that the project team can obtain during any requirements elicitation they conduct with the client (trainer).

## Scope

**In-Scope**

* Development of a basic chatbot capable of answering FAQs and providing basic financial advice.
* Integration with simple financial databases and APIs for real-time information.
* Deployment on a cloud service provider (AWS, Azure, or GCP).
* Compliance with data security and privacy regulations.
* Basic user training and documentation.

**Out-of-Scope**

* Advanced financial advisory services.
* Integration with complex third-party systems.
* Development of a mobile application.

## Phases and Milestones

1. **Initiation & Planning (Oct 1 - Oct 2, 2024)**
   * Project kick-off meeting
   * Requirement gathering
   * Project plan development
2. **Design (Oct 3 - Oct 4, 2024)**
   * Chatbot conversation flow design
   * Integration and architecture design
3. **Development (Oct 5 - Oct 10, 2024)**
   * Chatbot development
   * Integration with basic financial databases/APIs
   * DevOps setup for cloud deployment
4. **Testing (Oct 11 - Oct 12, 2024)**
   * Functional testing
   * User acceptance testing (UAT)
5. **Deployment & Go-live (Oct 13, 2024)**
   * Deployment to the cloud environment
   * Final testing and validation
   * Go-live
6. **Post-Implementation Support (Oct 14, 2024)**
   * Monitoring and issue resolution
   * Project closure

## Suggested Project Plan

**Initiation & Planning (Oct 1 - Oct 2, 2024)**

* Kick-off meeting
* Requirement gathering sessions
* Development of project charter and plan

**Design (Oct 3 - Oct 4, 2024)**

* Chatbot conversation flow design workshops
* Integration and architecture design sessions

**Development (Oct 5 - Oct 10, 2024)**

* Chatbot development sprints
* Integration with basic financial databases/APIs
* DevOps pipeline setup and configuration

**Testing (Oct 11 - Oct 12, 2024)**

* Functional testing by the development team
* User acceptance testing (UAT) by the testing engineer
* Bug fixing and retesting

**Deployment & Go-live (Oct 13, 2024)**

* Deployment to the chosen cloud environment
* Final validation and testing
* User training sessions and go-live support

**Post-Implementation Support (Oct 14, 2024)**

* Monitoring and issue resolution
* Final project review and closure meeting
* Handover to maintenance team

## Suggested Tools and Technologies

* **Cloud Provider:** AWS, Azure, or GCP
* **Programming Languages:** C#, Python
* **AI/ML Frameworks:** Dialogflow, Microsoft Bot Framework,
* **Data Storage:** SQL Server, Azure SQL Database, AWS RDS
* **DevOps Tools:** Jenkins, Git, Docker, Kubernetes
* **Testing Tools:** Postman, Manual Testing
* **Project Management:** Jira, MS Project
* **Version Control:** Git, GitHub

## Success Criteria

* Chatbot meets all documented business requirements.
  + This includes requirements discovered during requirements gathering sessions and during stakeholder collaboration throughout the duration of the project.
* Successful deployment to the cloud environment.
* Positive feedback from user acceptance testing.
* Compliance with all relevant data security and privacy regulations.
  + Appropriate documentation, frameworks, and standards should be identified and followed.
* Project completed within the specified timeframe and budget.