

This is the first deliverable of your capstone project

Please submit a document that outlines describe your capstone project, its application, and use and utility. No technical details are needed. Just English text describing the project is good.

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Product: Stock Portfolio portal such as finance.yahoo.com that displays financial data/information about chosen multiple stocks.

On finance.yahoo:

There is a field for "Ticker lookup"

Ex: The user uses the ticker for google "(GOOG)" and it searches for stocks with that name.

A few finance.yahoo fields:

Open:

Bid:

Day's Range:

Price:

Market Cap:

52 week range:

If one looks at it during the weekend he/she will get a different time than if looking during the week.

We need to base ourselves in yahoo finance

When you scroll down:

A particular user may be interested in a lot of stocks.

Functionalities:

- **Sign up**

- The first time user shall be able to sign. At the time of creating the user's profile.
 - the user shall be able to enter his/her profile information.
 - Part of the profile is to set up his/her stocks, where the program shall display a drop-down menu with 20 stocks symbols of any choice to suggest the user.
 - User shall be able to search any stock using the ticker name.
 - User shall be able to add any other stock besides the displayed stocks.
 - User shall be able to add 1 or more stocks and user shall be able to type his/her own symbols as preferences.
 - User shall be asked to set up 3 different security questions.
 - All the user's information should be stored in a database.

Ex: user chooses 5 out of 20 and provides 2 of his/her own stock symbols. Now he's got 7 stocks listed that he's interested on. Once the user logs on user shall be able to see information for only the 7 stocks the user picked.

We have the responsibility of displaying the information of the user's preferences.

- Setup 3 security questions for the forgot password functionality.

- **Login**

- After user create the profile, the user shall be able to log in with his/her credentials.
- As the user logs in, the user shall see the dashboard
 - **Dashboard**
 - As the user logs on → the software shall display a dashboard with his/her selected stock ticker displaying data (Previous Close value, Bid value, Ask Value, Day's Range, 52 Week Range Value, Avg. Volume, etc.) of each.
 - The software shall either display a list of the user's preferred stocks or shall displayed as a dashboard with the most important information, if the user wants to see the full information.
 - Dashboard shall includes edit profile link.

- **Forgot password**

- No need to set up sending email for forgot password. Once the user sets up his/her account, as specified before, the user shall be able to choose 3 different security questions from a drop-down and set 3 different answers.
- The system shall save the questions and answer in a database.

- The software shall validate the security answers entered by the user against what is stored in the database in the user's record.
 - The security question shall not display in same order. The questions shall display in random order.
 - When the information matches with database the system shall let the user recreate his/her password.
 - The new password shall be updated in the database with the user's record.
- Edit Profile
 - The user shall have edit profile option to edit his/her personal information.
 - The user shall be able to delete/add the stocks of his/her preference.
 - Edit profile will allow the user to edit all of his/her personal information and also add/delete stocks of preference.

Creating UI

Saving in database

Profile

Login

- Not looking for portfolio performance.

If we decide not to show any info that might be relevant for the end user in our app, we can add a link that redirects the user to the yahoo finance page.

Whatever mechanism we use to capture information from yahoo should be a separate script, which whenever we run it will get the information. Ex: if we run the script at 9am it should be running the information that was lastly saved in our database.

- We need to save the data to our database.

Capture the information, save in the database multiple times during the day.

- Project Description
 - aggregating financial information.
 - Target users (audience)
 - What is this tool going to solve? Users only get to see the information they are interested in. Informational tool
- Requirements Document
 - Pages, links, UI, UX, etc..
 - Outline things we are going to implement
 - The program that we write can be separate from finance yahoo (cr
 - Sign in/sign up, dashboard, script, edit profile, forgot password (with questions)

During the demo, if the professor creates a profile and chooses a few stocks from the list of 20 that we have as favorites, he expects to see data from our database.

We can add details of implementation (diagrams and everything) if we want to.

On the 14th week, the following are due:

- Final Demo Report (upload it into EMS)
- Powerpoint slides
- Demo day