

Objective

The objective of this document is to propose a roadmap for the development of the "Dashboards" product, a web application with the characteristics detailed in the service vision document.

More than defining delivery dates for functionalities, the goal is to make visible the generation and delivery of value for each phase presented here.

Phases

The development phases of CLIENT's "Dashboards" are essentially four:

Phase 1 - MVP (Minimum Viable Product)

The goal of this phase is to provide public access to the dashboards from the CLIENT website. With this, internet users who are interested will be able to view the application and choose sets of Dashboards to consult and interact with, based on the thematic business areas: Finance, Investments, Auditing, etc.

It is also in this phase that internal users of CLIENT will have secure access (using login and password) to the application, in order to manage and maintain the data used by the Dashboards.

Phase 2 - Advanced Features

This phase aims to improve the user experience based on feedback from users after interacting with the Dashboards application in phase 1.

Examples of possible improvements are:

- Integration (API construction) directly with data sources from other systems
- Development of advanced filters
- Report generation

Phase 3 - Optimization and Scalability

The focus of this phase is performance optimization, security, and support for larger volumes of data and users.

Phase 4 - Maintenance and Ongoing Evolutions

With the application already built and reaching the proposed value, it is considered that the product will enter the maintenance and ongoing evolution phase. This allows for adjustments that generate more value and further facilitate the use of the application.

Roadmap for the MVP of the "Dashboards" Application

The following is the proposed roadmap for the MVP of the "Dashboards" application, as there is already a predefined date and sufficient requirements for its development and release. The remaining phases will naturally begin after phase 1 and will be detailed in future revisions of this document.

Sprint 1: 08/10/2024 – 23/10/2024

Objective: Finalize the basic functionality for viewing public dashboards and the foundation of the administrative area for data management, as the development started in a “Sprint 0” with architecture and infrastructure.

Module 1: Public Dashboard Viewing Page

- Creation and display of a basic public dashboard: Develop the public interface where any user can view the data.
- Change of the initial integration with a static data source: Stop using mock data or static files for display on the dashboard and build the (backend) real integration with the dedicated application database.
- Improve page responsiveness: Implement improvements so the public page is accessible across different devices (desktop and mobile).

Module 2: Administrative Area for Data Management (Essential)

- Basic authentication: Implement integration with Keycloak to allow internal users to log in with differentiated permissions (admin).
 - Basic Excel file upload (.xls, .csv): Implement the basic functionality for uploading Excel spreadsheets without full template validation.
 - Display reference templates: Create an area where internal users can view and download the expected Excel templates.
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Sprint 2: 24/10/2024 – 06/11/2024

Objective: Expand the implemented functionalities and ensure the minimum viable delivery of essential modules.

Module 1: Public Dashboard Viewing Page

- Basic filters on the public dashboard: Ensure functionality for users to apply simple filters such as date and categories.
- Initial integration with dynamic data sources: Improve integration with real data using a simple data source (database). Start the implementation or evaluate the technical feasibility of using web sockets for real-time dashboard updates.

Module 2: Administrative Area for Data Management (Essential)

- **Basic Excel template validation:** Implement validation for uploaded Excel files, ensuring they follow the necessary basic format for processing.
 - **List of imported files:** Display a simple list of imported files with basic success or failure status.
 - **Simple error notifications:** Implement basic notification functionality for internal users if the uploaded file contains errors.
 - **Simulation of dashboard updates:** Study or begin implementing a feature to simulate dashboard updates before the actual update occurs on the public page.
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Considerations for the MVP

- **Focus on essential functionalities:** The goal is to have a functional public interface and an internal area with the minimum required to import and validate data. More advanced details, such as complex integrations and detailed reports, will be handled in future sprints.
- **Flexibility for adjustments:** Both sprints should be agile, allowing for quick adjustments and prioritizing the continuous delivery of crucial functionalities.

With this roadmap, we will cover the essential components for a functional first version of the application.

MVP Presentation

The MVP presentation is scheduled for **15/10/2024** to the financial board of CLIENT and other stakeholders. As this date falls during the course of Sprint 1, some functionalities may still be in refinement stages.

Points of attention for this date:

- **Rigorous testing:** Complete the tests for the public page by **13/10/2024** to ensure stability and present a well-prepared version to stakeholders.
 - **Guided demonstration:** Prepare a narrative for the presentation, highlighting the main benefits of the public visualization page and how it facilitates data and indicator tracking.
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Revision History

Date	Version	Description	Author	Approved by
01/10/2024	1.0.0	Initial version	Lucas Goularte Godoy	