1-30-17

Bank Budget Application

Abimbola Adeyemi

Richard Borsella

Anthony Boruch

Zachary Brown

John Buckley

Nicholas Thompson

Wayne Nguyen

|  |  |
| --- | --- |
| **Project Title:** Bank Budget Application | |
| **Start Date:** 1/17/17 | **End Date:** 5/12/2017 |
| **Project Manager:** Anthony Boruch | |
| **Project Sponsor:** UMKC | |
| **Customer:** Commerce Bank | |
| **Users:** Commerce bank Clientele | |
| **Stakeholders and Expectations:**  Commerce Bank: Wants a web application that allows customers to set goals for budgeting and gamify the rewards when goals are met.  Team: Will deliver a web app that meets the requirements of the client and in our own way to gamify the process and rewards  User: to have an app/tool that is useful and easy to navigate. | |
| **Purpose (Problem or opportunity addressed by the project)**:  For many households, budgeting and saving money is a luxury that seems out of reach, or too complicated to manage in their daily lives. There are many budgeting applications that feels disconnected from the real world or geared more towards businesses.  The purpose of this project is to provide a web/mobile based application/tool to help average bank clientele achieve real-world goals of saving money. This could be handled by depositing money into a savings account or reduce the amount of money spent on purchases like dining out, groceries, entertainment, etc. Other money saving tips can be suggested.  Another purpose of this project is to make budgeting/ saving money fun and rewarding. For people to stay on course, a reward system can be implemented, and to make them actually want to use the application, we will gamify as much of the process to make it fun for our users. | |
| **Goals and Objectives**: The general goal of this project is to make a web application that will help an average bank user to manage and save money. This can be done on a desktop PC or a mobile device.   * The web application should be useful at managing user funds. Users should be able to set up savings goals and spending limit goals. * The web application should be convenient and easy to read. (base users will be obtained from Commerce Bank) User should be able to navigate thru application and set up goals within several minutes. Experience of application should not cause confusion, frustration, or anxiety to the user. * The web application should incorporate gamification. Once savings goals or limit achievements are met, a reward feature is activated for the user. Gamification of application can ensure reusability once one goal is met. | |
| **Schedule Information (Major milestones and deliverables)**:  The following milestones are planned. Dates are rough estimates and can be changed  Additional milestones can be added or deleted.  02/03/2017 - Gather Requirements  02/06/2017 - Project Charter Complete  02/08/2017 - Scenarios of Use Complete  02/08/2017 - Project Backlog Complete  02/15/2017 - Requirements Complete  02/27/2017 - Technical Prototype Complete  03/01/2017 - Project Plan Complete  03/06/2017 - Iteration #1 Complete  03/08/2017 - Customer Approved UI Prototype Complete  03/15/2017 - Architecture Document Complete  03/20/2017 - Iteration #2 Complete  04/03/2017 - Iteration #3 Complete  04/12/2017 - Testing Report Complete  04/24/2017 - Iteration #4 Complete  04/26/2017 - User Guide and System Documentation Complete  05/05/2017 - Product Released | |
| **Financial Information (Cost estimate and budget information)**:  There is no budget for this project. Recourses can be provided by UMKC staff and facilities. All team members have the rights to this project. | |
| **Project Priorities and degrees of freedom:**  Final due date of project is not negotiable. A requirements and clarification meeting from Commerce Bank will be held on 2-3-17. Other milestones can be moved up or down depending on the complexity. In the end, the product has to be reliable, robust, complete, etc. | |
| **Approach:**  An iterative and incremental approach is planned. Scrum meetings are scheduled. High priority features will be implemented first versus optional low-use features. Meetings with Commerce Bank will be held to further address requirements and overall direction of project. | |
| **Constraints**:   * Web application built in .Net framework * Database for application is SQL server 2012 * Web application due May, 2017 | |
| **Assumptions**:  So far this project is aimed at regular Commerce bank clientele. The application should be easy to use, easy to read, etc so a 5th grader can be proficient with it. Some requirements by Commerce Bank are laid out in a handout, but clarification is needed when we meet with them. | |
| **Success Criteria**: Success for this project will be achieved when the application meets all of the customer’s expectations while operating reliably. The application must pass each rigorous test that the project team drafts for it as well. | |
| **Scope**:  In this project we will deliver:   * A web-based budgeting application that will provide customers of Commerce Bank a tool to plan and save for the future * A reward system for the customer to track and meet their goals * A smooth user experience that will not intimidate any customer and be enjoyable to use * A completed product by 05/05/2017 | |
| **Risks and obstacles to success**:  Team staff has little experience with .net framework.  Integration with other software and devices might not be compatible.  Requirements/ wants from Commerce Bank might not be known. | |
| **Signatures**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Project Manager : Tony Boruch**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Project Sponsor : UMKC**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Customer : Commerce Bank**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Technical Lead : Nick Thompson** | |