# **CSC154 Software Development**

# **Project Overview Template**

Project Name:

Team Number: Group 2

Project Manager: Phil Wallace

Team Members: **Andrea Yaser, Alexander Bass, Mariam Faragalla, Austin Carranza, Corey Presutty**

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## Project Objective

* Successfully implement key features.
* Create an intuitive and user-friendly interface that simplifies navigation.
* Enhance user experience by providing them with clear visualizations and progress indicators for
* savings goals, financial reports, and budget analysis.
* Enable automatic transaction imports through integration with financial institutions.
* Allow users to also manually input and categorize income and expenses using a wide range of detailed categories and sub-categories

1. Project Scope

Included in Scope:

* Income Tracking: Ability to automatically or manually input and categorize various income sources.
* Expense Tracking: Capability to record expenses (both manually or automatically), categorize them, and set budgets for different categories.
* Savings Goals: Feature to create and track savings goals with progress indicators.
* Financial Reports: Generation of detailed reports on income, expenses, savings, and spending habits.
* Budget Analysis: Tools to analyze spending patterns, identify areas for cutting cost, and provide recommendations.
* Integration with Financial Institutions: Optional integration with banks and credit unions to automatically import transaction data.
* User Interface: Easy to use User Interface that should be easy to navigate and understand.
* The requirements included within the project scope are the main features and functionalities to be developed.

Excluded from Scope:

* Investment Tracking: Detailed tracking of investments (stocks, bonds, ETFs etc.).
* Debt Management: Comprehensive tools for managing and paying off debts.
* Tax Preparation: Assistance with tax filing or calculations.
* Retirement Planning: Retirement savings estimation and planning.
* Mobile Application: Easy to use application for mobile devices (iOS and Android).

## Team Collaboration and Documentation Tools

## Collaboration and documentation tools

## Jira

## Discord

## GitHub

## Microsoft teams

Usage of Tools  
Jira: We will use Jira in several ways for project management to plan and manage sprints.

* Use the project board to assign tasks.
* Use the project board to track tasks and issues.
* Use the project backlog to define and prioritize work our team will take on now and in the future.
* Use Jira's calendar view or timeline to visualize work overtime and hit deadlines.
* We will generate reports on team performance, issue status, and project health.
* We will use sprint insights to view sprint health and progress towards goals.

Discord: We will use discord to communicate and have our weekly meetings.

* We will use Discord to discuss any problems, ideas, and to conduct reviews.
* We will use Discord to share files.

Microsoft teams:

We will use Microsoft teams for a second means of communication or back-up.

GitHub: We will use GitHub for version control and a code repository.

* We will each create branches for our code or bug fixes.
* We will perform pull requests to review code before merging with the main branch

## Project Management Plan and Methodologies

For our project, which involves income tracking, expense tracking, savings goals,  
financial reports, budget analysis, and integration with financial institutions, we  
will be using the following project management methods and tools:

Agile Methodology:

Given that our project encompasses multiple features (income, expenses,  
savings, reports, etc.), Agile is an ideal approach for our project. It allows us to  
break down the development process into smaller, manageable increments called  
"sprints," enabling continuous feedback and adjustments.

Application:

* Sprints: The project is divided into sprints, with each sprint focusing on  
  delivering specific features such as Income Tracking, Expense Tracking,  
  Savings Goals, and more.
* Stand-up Meetings: We hold regular, short meetings (usually on Thursdays)  
  to ensure the team is aligned and any blockers are addressed.  
  Review and Retrospective: After each sprint, we review progress, test  
  completed features, and gather feedback for future improvements.

Tools:

* Jira: We use Jira to create boards that track tasks for each feature (Income  
  Tracking, Expense Tracking, etc.). Tasks are assigned, deadlines set, and  
  priorities managed.
* Discord and Microsoft Teams: These platforms facilitate team  
  communication and quick discussions, ensuring everyone stays on the same  
  page throughout the project.