

# Financial Budgeting App

## High Level Requirements Document

Version 1.5

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### Project Identification

Project:	Group 8
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### Contributors

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### Distribution

*This document is distributed to all the following people.*

Name	Title
Adam Simcoe	Information Flows
Trang Nguyen	Requirement Scope Area
Christian Do	Requirement Scope Statements
Nhan Tran	Requirement Scope Statements
Nhu Ly	External Entity

### Referenced Documents

*This document refers to the following materials*

Version number	Title	Author	Date	Source / Location
1.2	Project Summary	Adam Simcoe, Trang Nguyen, Christian Do,	September 18 <sup>th</sup> , 2024	

## HIGH LEVEL REQUIREMENTS Financial Budgeting App

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		<i>Nhan Tran, Nhu Ly</i>		
<i>1.4</i>	<i>Project Vision</i>	<i>Adam Simcoe, Trang Nguyen, Christian Do, Nhan Tran, Nhu Ly</i>	<i>September 26<sup>th</sup>, 2024</i>	
<i>1.4</i>	<i>Minutes of Meeting</i>	<i>Adam Simcoe, Trang Nguyen, Christian Do, Nhan Tran, Nhu Ly</i>	<i>September 26<sup>th</sup>, 2024</i>	

### Revision History

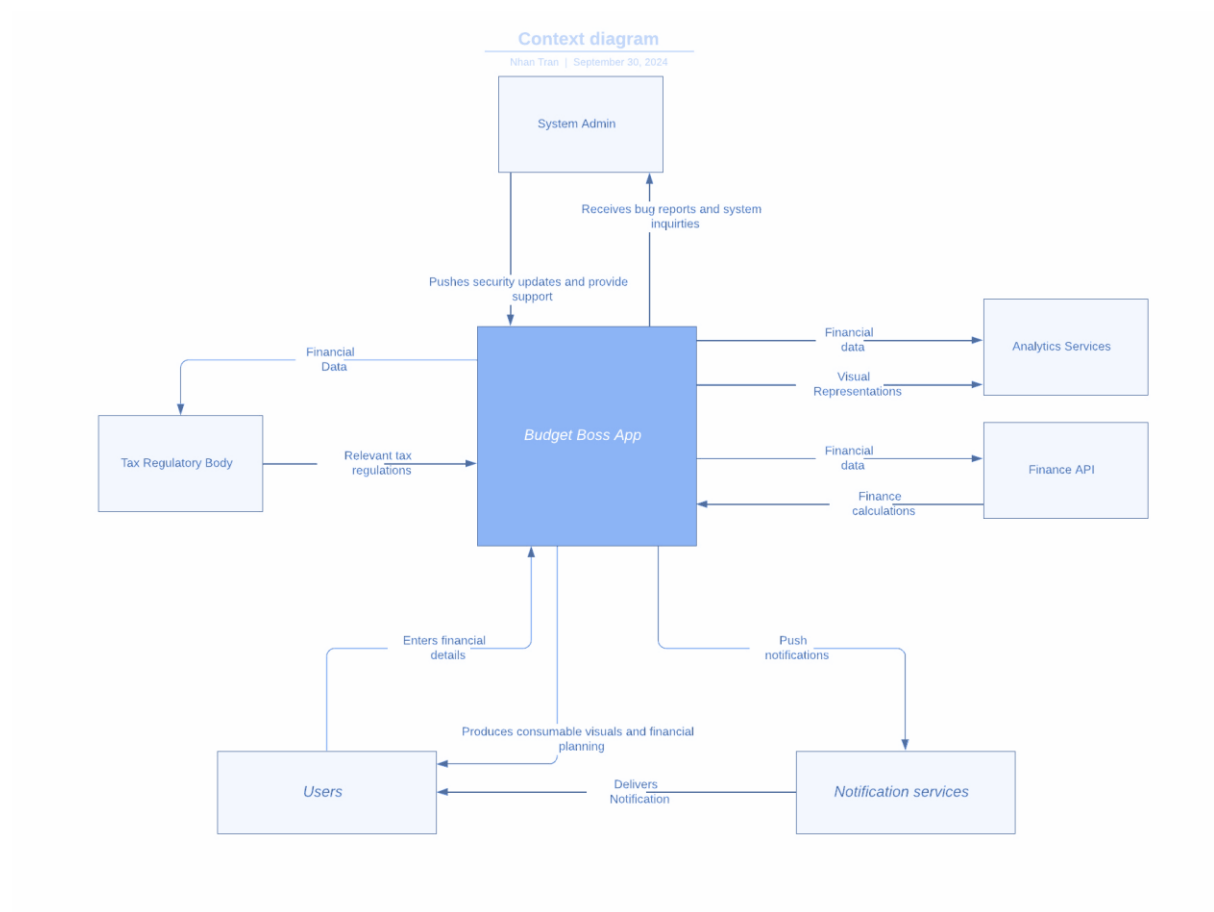
Version Number	Revision Date	Summary of Changes	Modified by
<i>1.3</i>	<i>September 19<sup>th</sup>, 2024</i>	<i>Updated Business Context Diagram, Requirements Scope Statements, and High Level Business Requirements Sign-Off</i>	<i>Adam Simcoe, Trang Nguyen, Christian Do, Nhan Tran, Nhu Ly</i>
<i>1.4</i>	<i>September 26<sup>th</sup>, 2024</i>	<i>Updated Referenced Documents section.</i>	<i>Adam Simcoe, Trang Nguyen, Christian Do, Nhan Tran, Nhu Ly</i>
<i>1.5</i>	<i>September 30<sup>th</sup>, 2024</i>	<i>Added Business Context Diagram</i>	<i>Adam Simcoe, Trang Nguyen, Christian Do, Nhan Tran, Nhu Ly</i>

*[Note: It is recommended that drafts be numbered 0.1 to 0.9, and that the first approved version be numbered 1.0. Thereafter, new version numbers will depend upon changes: 1.01, 1.1, etc for minor updates, 2.0, 3.0 etc for major changes.]*

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## 1. Business Context Diagram



Requirement Scope Area	Description
Client Dashboard	Area for viewing and entering personal information
Budget Creation	Allows users to set up customizable budgets by categories
Expense Tracking	Area for tracking expenses
Income Management	Area for tracking income sources to compare against planned budgets
Data Visualization	Area for graphs and charts to present expense and saving patterns

External Entity	Description
User	Individual using application
Financial APIs	It helps to analyze the inputs from users and shows specific information.
Tax Service APIs	Generate tax-related documents.
Notification Services	Services used to communicate with users (Twilio, etc.)

Information Flows	Description
User	Provide personal information
Data Table	Receives and stores financials information from users
System	Compiles and analyze user's information and financials
Visual Dashboard	Display the compiled and analyzed data in a visual format for users

## 2. Requirements Scope Statements

HLR#	Description	Priority (H, M, L)
HLR01	Users must have a visual view of their finances	H
HLR02	Users must be able to create and manage monthly budgets	H
HLR03	Users must be able to input their expenses and income	H
HLR04	Users must be able to categorize their expenses	M
HLR05	Users must receive notifications and alerts for budget limits	L
HLR06	Users must be able to create and manage their profile information	H
HLR07	The system must provide data security with encryption	H
HLR08	Users must have access to customer support and help resources (e.g., FAQ, live chat).	L

## 3. High Level Business Requirements Sign-Off

The undersigned acknowledge their agreement with the contents of Version 1.3 of the **High-Level Requirements** document for **Financial Budgeting App**.

Following approval of this document, requirements changes will be governed by the project's change management process, including impact analysis and appropriate reviews and approvals, under the general control of the Project Plan and according to company policy. Approved Change Request Documents, if present, will be attached to this Requirements Document as updates.

Name	Project Role and Functional Area	Date Signed
Adam Simcoe		September 19, 2024
Trang Nguyen		September 19, 2024
Christian Do		September 19, 2024
Nhan Tran		September 19, 2024
Nhu Ly		September 19, 2024

\* Note: physical signatures are not required. Email approvals are acceptable and should be appended to project documents.