CMSI 401 Project Status Sheet
Fall 2005

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Project: Finance Buddy

Period Covered: Oct 12 - 25

Accomplishments since last report:

➢ Connected the Firebase database to the app's front end, for real time storage

➢ Updated the app's layout and design to improve usability and visual appeal, using the new Canva design updates

➢ Narrowed down potential Hugging Face chatbot models to three options that best fit the app's goals for financial advice and personalization

➢ Conducted team discussions and preliminary testing of the models to evaluate response quality and user experience

Scheduled tasks to be done by next report:

➢ Vote and finalize the chatbot model selection for Finance Buddy (Nov 8)

➢ Begin initial integration of the chosen model into the app to enable basic chatbot interactions (Nov 8)

➢ Develop a calming and user friendly color scheme for the app's interface to give a stress free financial planning experience (Nov 8)

➢ Continue refining the UI design and testing the new layout for visual consistency and responsiveness (Nov 8)

Noteworthy risks, concerns, or problems:

➢ Risk 1: Final model selection may take additional time if we don't agree
Mitigation Plan: Establish clear evaluation criteria (accuracy, tone, personalization potential, and runtime efficiency) to guide the voting and decision-making process efficiently

➢ Risk 2: Design changes may affect feature placement or require code refactoring
Mitigation Plan: Document all layout updates and assign testing to ensure UI consistency across screens after each design iteration

➢ Risk 3: Color scheme experimentation may slow development if too many design variations made
Mitigation Plan: Limit testing to 2–3 color palette options and decide quickly

Explanation of expectations for status reports

Status reports must be specific. Project management will not understand what is going on with the project, and thus be able to track progress and "earned value", unless you provide details. This means they will come bug you later for the details you didn't provide them, and will interrupt your work progress twice for one report. This is not only inefficient, but also can be downright annoying. So, here are some tips for informative status reports. Keep in mind these are good things to present as part of your oral status reports as well.

Under "Accomplishments" it is not sufficient to write "Wrote code". Instead, describe the details of the tasks you completed:

- ➢ Held two group meetings and hashed out button placement issues on GUI design.
- ➢ Modified two product line windows to the shorter version, as agreed in prior meeting.
- ➢ Removed hard-coded path names and replaced them with symbolic references that included separate site, directory, and filename components.
- ➢ Replaced the login function with one that made UNIX called, rather than NT calls.

Under "Scheduled tasks" it is not sufficient to write "Write code". Instead, write explicit text describing the task and include the data for scheduled completion:

- ➢ Code and standalone test add-manufacturer capability (23 March)
- ➢ Complete design, code and standalone test of add-facility capability (25 March)
- ➢ Complete facility inspection report generation (29 March)

Under "Risks" it is not sufficient to write "not enough time". Explain what the risk or concern is, how it impacts schedule, and how the problem will be solved:

- ➢ Need to travel on other business 30 March - 4 April.
- ➢ Will not be able to meet 5 April due date at a result.
- ➢ Will link with existing customer interview report generator, rather than redesigning the report using the updated layout and logo, with delivery on 8 April.
- ➢ Should be able to include improved customer interview report generator by 15 April.