CMSI 401 Project Status Sheet
Fall 2005

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Project:	Finance Buddy	**Period Covered**:	Oct 1 - 11

Accomplishments since last report:

- Designed and finalized the UI/UX layout of the Finance Buddy app using Canva, including screens for login, dashboard, and chatbot interaction
- Implemented Firebase authentication for user login and sign-up functionality
- Set up the Firebase database structure for storing user financial data (e.g., income, expenses, and savings goals), though integration with the front end is still pending
- Conducted a team brainstorming session to explore potential AI chatbot models on Hugging Face
- Researched and compared several financial assistant and personalized recommendation models to determine which would best support Finance Buddy's personalized financial advice and budgeting features

Scheduled tasks to be done by next report:

- Connect Firebase database to the app's front end to enable real-time data storage and retrieval for user financial inputs
- Select and fine-tune a Hugging Face model suitable for financial advice and personalization
- Begin chatbot integration into the app, starting with basic user input/output testing
- Continue UI implementation in the app (based on Canva design) using Swift to ensure consistent design and functionality

Noteworthy risks, concerns, or problems:

- Risk 1: Difficulty identifying an open-source Hugging Face model that accurately provides financial advice while maintaining compliance with responsible AI use.
  Mitigation Plan: Continue testing multiple models and, if necessary, fine-tune an existing model with publicly available financial data to improve relevance and safety (October 30)
- Risk 2: Firebase database isnt connected yet, delaying progress on user data storage and app testing
  Mitigation Plan: Prioritize database integration and schedule time to resolve any connection issues (October 30)

- Risk 3: Time constraints in balancing AI model integration and app functionality.
  Mitigation Plan: We each get assigned a role (so one person focuses on finding the best model, another on Firebase integration) to make sure all the features are being improved at once (Oct 30)

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.