TERI 11/28/2016–12/4/16

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| Progress  * Refactored front-end (Ryan) * Created Presentation (Everyone) * Refactored objects for projection (Jordan) * Refactored objects for spending optimization (Phil) | Risks  * Presentation demo |
| Plans  * Present * Break | Needs  * Host project on VM for sponsor |

TERI 11/21/2016–11/27/16

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| --- | --- |
| Progress  * Created bar chart (Ryan) * Added forms for financial info (Derek) * Rough version of projections (Jordan) * Rough version of spending optimization (Phil) | Risks  * Long Break * Miscommunication |
| Plans  * Refactor and fix up code (Everyone) * Presentation (Everyone) | Needs  * None |

TERI 11/14/2016–11/20/16

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| --- | --- |
| Progress  * Completed the projection table, totals calculation, download xlsx (Ryan) * Monetary accounts are editable, bug fixes (Derek) * Spending Projection calculation (Phil) * Savings Projection calculation (Jordan) | Risks  * library issue on Derek’s computer |
| Plans  * Complete the basic projection flow before the end of the semester (Ryan / Derek) * Fix UI bugs (Ryan / Derek) * Combine savings and spending projection into one API call (Phil / Jordan) * Document the algorithm structure (Phil / Jordan) | Needs  * Break |

TERI 11/7/2016–11/13/16

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| --- | --- |
| Progress  * Projection Table shows the totals (Ryan) * Updated create accounts and fixed bugs (Derek) * Began Savings projection (Jordan) * Began Spending projection (phil) | Risks  * Senioritis |
| Plans  * Finish and style the projection table (Ryan) * Make Monetary accounts editable (Derek) * Finish Simple savings projection (Jordan) * Create simple spending allocation algorithm (Phil) | Needs  * None |

TERI 10/31/2016–11/6/16

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| --- | --- |
| Progress  * Client information can be edited in the UI * Monetary accounts are displayed in the UI * Beginnings of projection table * Account rules have been created | Risks  * Taking on too many story points |
| Plans  * Bug fixes documented in JIRA * Implement savings projection in front end * Implement savings projection in back end * Begin savings optimization implementation | Needs  * Discover what’s wrong with Steve’s computer |

TERI 10/24/2016–10/30/16

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| Progress  * Created script to install and run the entire program (Ryan) * Started working on Teri-35, make account information editable (Derek) * Modified Account Types (Jordan) * Modified APIs to support new Account types (Phil) | Risks  * Not enough unit tests on the Tax Engine |
| Plans  * Finish tax computations (Ryan) * Move tax configurations to database/import.sql (Ryan) * Implement the savings projection (Jordan) * Implement APIs to modify financial info for pension and social security (Phil) | Needs  * To complete other projects |

TERI 10/17/2016–10/23/16

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| --- | --- |
| Progress  * Started script to install and run the program (Ryan) * Fixed monetary account creation connection to backend (Derek) * Began work on account rules (Jordan) * Updated 401k attributes (Phil) | Risks  * No native unzip tool for Windows 7 batch script |
| Plans  * Finish install script (Ryan) * Make client information editable on frontend (Derek) * Start work on savings projection (Jordan) * Update account types per last meeting’s discussion (Phil) | Needs  * None |

TERI 10/10/2016–10/16/16

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| --- | --- |
| Progress  * Implemented UI   + Create client accounts (Derek)   + Create monetary accounts (Derek)   + Navigation bar (Ryan)   + Integrate with backend (Ryan) * Created API (Phil) * Implemented database connection (Jordan) | Risks  * Team members not here * Trial license of jira expired |
| Plans  * Develop script to automatically install dependencies and run program on Steve’s laptop (Ryan) * Finishing touches for UI (Derek) * Backend additions to support UI additions (Phil) * Update account fields based on Sponsor feedback (Jordan) | Needs  * Get Jira running again |

TERI 10/3/2016–10/9/16

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| --- | --- |
| Progress  * Tax Calculation (Ryan)   + Fixed small bug in AGI calculation   + Verified data with sponsor * Began New UI (Derek)   + Completed flow for creating client account   + Completed flow for adding monetary account * Accounts (Jordan/Phil)   + Implemented APIs for CRUD operations on accounts | Risks  * Away for long weekend * Projects from other classes |
| Plans  * Finish front end user stories (Derek/Ryan)   + Make the existing UI stuff look better   + Connect front-end to back-end via APIs * Finish API and documentation (Phil/Jordan)   + Complete the APIs for monetary accounts   + Connect Monetary accounts to database | Needs  * None |

TERI 9/26/2016–10/2/16

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| Progress  * Tax Calculation (Ryan)   + Qualified Dividends and Capital Gains Worksheet   + ~80% of tax test data is correct * Began New UI (Derek)   + Followed tutorials to learn React.js   + Implemented client creation flow * Accounts (Jordan/Phil)   + Hooked up an ORM tool   + Finished implementing account classes   + Experimented with building APIs | Risks  * Exams * Columbus day weekend |
| Plans  * Finish the tax calculation (Ryan)   + Implement tax calculation worksheet * Finish front end user stories (Derek)   + Expand understanding of react/redux workflow   + User stories 12 and 13 * Finish API and documentation (Phil/Jordan) | Needs  * Work time |

TERI 9/19/2016–9/25/16

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| --- | --- |
| Progress  * Tax Calculation (Ryan)   + Adjusted Gross Income   + Taxable Social Security Amount   + Itemized Deductions and Limits   + ~50% of test tax data is calculated correctly * Savings Component(Phil/Jordan)   + Account abstract class   + IRA/Non-qualified/ROTH IRA begun * Did tutorials for UI technology (Derek) | Risks  * Illness * Tax data mismatching between pdf and spreadsheet * Finding Accurate Tax rule explanations |
| Plans  * Add persistence to accounts (Jordan/Phil) * Have UI call APIs and show adding an account (Derek) * Complete tax engine (Ryan) | Needs  * Health |