TERI 11/28/2016–12/4/16

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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

|  |  |
| --- | --- |
| 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
 |