



**Sprint Planning Document (Sprint 2)**

**Sprint Goal Backlog (Sprint 2)**

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# High-level Project Overview

## Project Mission:

- The Insighters Workflow Automation project aims to provide a secure, modernized, and automated client onboarding platform for Insighters Inc. Through this application, the firm can securely collect sensitive tax information, automate document storage, and trigger operational workflows without manual data entry.

## Problems We Are Solving:

- There is currently a heavy administrative burden on staff to manually process physical or emailed PDF intake forms.
- Client onboarding tasks (like creating secure folders and notifying the team) are currently decentralized and require manual steps across different platforms (ShareFile, Monday.com).
- Handling Highly Sensitive PII (like SSNs and Bank Routing numbers) via email or unencrypted storage poses a significant security liability.
- Adding additional workflows to Monday.com automatically will drastically reduce the time needed spent on manual repetitive tasks.

## Project Overview (High-Level Features):

- **Web-Based Intake Forms:**
  - **Temp Login:** Clients can sign into the emailed form link using a generated temp login to prevent duplicate submissions and form spam.
  - **Business Intake Form:** A secure digital form for corporate clients to submit organizational and financial history.
  - **Individual Intake Form:** A secure digital form for personal tax clients to submit demographic, dependent, and income information.
- **Admin Dashboard:**
  - Login protected dashboard for Insighters Inc. Employees to generate temp logins and email form links to prospective clients using Microsoft OAuth and the Graph API
- **PII Handling (Security):**
  - The system will accept highly sensitive data (SSNs) but will never save it to the database. Instead, it will temporarily hold the data in memory to generate a completed PDF form.
- **Workflow Integrations:**

- **ShareFile Integration:** Automatically upload the generated, PII-containing PDFs directly to the firm's secure ShareFile system. *This feature is temporarily on hold based on client feedback.*
- **Monday.com Integration:** Automatically ping the firm's Monday.com board using GraphQL when a new client form is submitted and generate a new client workflow.
- **PDF Email Integration:** Automatically email the completed PDF to a centralized Insider's email inbox that will in turn run a process created by their IT team to upload the PDF to the ShareFile cloud storage.
- **Secure Infrastructure:**
  - **Google Cloud Platform (GCP):** Host the application via Cloud Run, utilize Google Secret Manager to protect all API keys and database credentials, and use Cloud SQL to host the database.
  - **Docker:** Containerize the application and database for consistent local development and production deployment.

# Sprint 2 Planning

## Sprint 2 Goals:

1. **Private Cloud Deployment hosted on Google Cloud Platform (GCP)**
2. **Enterprise Authentication using Microsoft OAuth.**
3. **Automated Emails to Clients using Microsoft Graph API**
4. **Managed Database Persistence using Cloud SQL**
5. **Automated PDF Generation after form completion**
6. **Integration with Monday.com and Workflow initiation**
7. **Automated PDF emailing upon form completion**
8. **Security Hardening**
9. **Update Project Website**

## Sprint 2 Deliverables:

- **Private Cloud Deployment on GCP:**
  - **Assigned:** {Keegan Doyle}
  - Migrated the application from local Docker containers to a production Cloud Run environment.
  - Configured Cloud Build triggers to automate deployments directly from the GitHub repository.
  - Established an internal-only deployment strategy for secure testing before public exposure.
- **Enterprise Authentication using Microsoft OAuth:**
  - **Assigned:** {Keegan Doyle}
  - Implement django-allauth to facilitate secure Single Sign-On (SSO) for Insighters Inc. staff
  - Configure the Microsoft Entra ID handshake, replacing the initial “Temp Login” prototype.
  - Restrict dashboard access to corporate identities to ensure internal data security. Currently any Microsoft account can log in for testing.
- **Automated Email to Clients using Graph API:**
  - **Assigned:** {Keegan Doyle, EJ Jones, and Tyler Bish}
  - Integrate the Microsoft Graph SDK to allow the application to send emails from the firm’s domain. (Keegan)
  - Use the Temp Login Logic from Sprint 1 and include the custom temporary login to the client email (Tyler)
  - Create custom email template with input from the sponsor (EJ)

- Create process completion status for the client post submission (Tyler)
- **Managed Database Persistence using Cloud SQL:**
  - **Assigned:** {Keegan Doyle and Ayush Singh}
  - Provision a PostgreSQL 15 instance on Google Cloud SQL to replace the local Docker database for the live deployment. (Keegan)
  - Connect the application via the Cloud SQL Auth Proxy for encrypted data transmission. (Keegan)
  - Execute migrations to establish the BusinessIntake and IndividualIntake tables in the cloud. (Ayush)
- **Automated PDF Generation after form completion:**
  - **Assigned:** {Ayush Singh}
  - Build a backend engine to map user input directly into a fillable PDF template in-memory.
  - Ensure that sensitive PII, such as SSNs, are injected into the PDF but never written to the SQL database.
  - Implement validation logic to ensure the generated PDF matches the formatting of the original physical forms
- **Integration with Monday.com and Workflow initiation:**
  - **Assigned:** {Tyler Bish}
  - Utilize GraphQL to automatically create new items on the firm's Monday.com boards upon submission.
  - Map form fields to specific Monday.com columns to eliminate manual data entry for staff.
  - Trigger automated status updates to notify the team when a new client requires review
- **Automated PDF emailing upon form completion:**
  - **Assigned:** {EJ Jones}
  - Configure the system to automatically attach the generated, PII-containing PDF to an internal email.
  - Encrypt the outgoing email attachments to maintain high-level security for sensitive tax data.
  - Streamline the delivery process so the firm receives completed files without manual intervention.
- **Security Hardening:**
  - **Assigned:** {Keegan Doyle and Tyler Bish}
  - Finish Implementation of Google Secret Manager to dynamically inject API keys and database credentials at runtime. (Keegan)
  - Enforce production SSL/TLS settings, including secure cookies and CSRF trusted origins. (Tyler)
  - Avoid printing secrets and sensitive information into cloud logs (Keegan)
- **Update Project Website:**
  - **Assigned:** {Keegan Doyle}

- Refresh the GitHub Pages project site with new documentation for Sprint 2 milestones