

## DATE1 - 3/3/26

- Met in Doster Hall from 2:15-2:30

### Keegan Doyle

- **Tasks completed since last meeting:** Reworked on project plan to better align with Sprint 2 timeline. Worked on PDF forms to make them easy to integrate with PyPdf.
- **Tasks to complete before next scrum:** Set up Microsoft 365 Developer account for the group to set up Oauth and Microsoft Graph API Email sending.
- **Any barriers or challenges encountered:** Trouble figuring out how to best send emails within the budget of Insighters. Definitely further discussions with sponsor need to be had.

### EJ Jones

- **Tasks completed since last meeting:** Researched Django email documentation
- **Tasks to complete before next scrum:** Create HMTL Email templete used for emailing clients information on accessing the PDF
- **Any barriers or challenges encountered:** Not much experience with Microsoft GraphAPI which would be used to send the emails to the client. Have to make sure that it has the proper SMTP

### Tyler Bish

- **Tasks completed since last meeting:** Coordinated project plan adjustments and storyboarded Monday.com implementation details before beginning program development.
- **Tasks to complete before next scrum:** Begin Monday.com API integration and confirm functionality before pushing to application and beginning initial debugging.
- **Any barriers or challenges encountered:** Working in production environment of Monday.com and had initial concerns regarding setting up a testing environment within their prod application.

### Ayush Singh

- **Tasks completed since last meeting:** Researched how to work with fillable PDF files and how to generate PDFs from Django.
- **Tasks to complete before next scrum:** Start implementing PDF generation and map model data to the fillable PDF templates so the files can be generated and saved locally.
- **Any barriers or challenges encountered:** None to mention.

## DATE2 - 3/5/26

- Met in Doster Hall from 2:15-2:30

### Keegan Doyle

- **Tasks completed since last meeting:** Integrated Oauth using a dev Microsoft Entra ID tenant and put the logic in place to connect to Insighters Entra ID once we can gain access from their IT.
- **Tasks to complete before next scrum:** Work with EJ and the Graph API to get emailing from the app to the client working properly.
- **Any barriers or challenges encountered:** Microsoft disabled the 365 developer program for students so I had to work around that when creating a dev Entra ID to code with.

### EJ Jones

- **Tasks completed since last meeting:** Created bareboned email templete used to email clients their login information as well as instructions on how to access intake forms.
- **Tasks to complete before next scrum:** Tasks to complete before next scrum: Work with Keegan and the Graph API to get emailing from the app to the client working properly. Add finishing touches to email templete.
- **Any barriers or challenges encountered:** Email templettes can be tricky when working with them because of the numerous email clients avialible. I found trouble make sure that the html was able to work with all clients.

### Tyler Bish

- **Tasks completed since last meeting:** Instantiated developer Monday.com test suite. Configured correct Monday.com boards (tables) with same data from production environment and configured the correct GraphQL API call to update boards.
- **Tasks to complete before next scrum:** Integrate GraphQL API calls in Javascript to be worked into Django application. Ensure security and API keys are not visible on client-side.
- **Any barriers or challenges encountered:** Integrating a custom Javascript program to automatically run using ported data from our Django web-app has proved difficult, requires lots of debugging time.

### Ayush Singh

- **Tasks completed since last meeting:** Worked on the initial PDF generation setup for the Individual Intake form. Implemented the base structure for autofilling PDF templates using submitted form data.
- **Tasks to complete before next scrum:** Continue testing the PDF generation and begin refining the field mapping between the Django models and the PDF template fields.
- **Any barriers or challenges encountered:** Main challenge was identifying the correct PDF field names and handling checkbox fields properly.

## DATE3 - 3/8/26

- Met on Microsoft Teams from 1:20-1:45

### Keegan Doyle

- **Tasks completed since last meeting:** In Oauth, setup the Microsoft Graph API for emailing from the web admin portal to the client and worked with EJ on the email templates. Work with the Insighters IT to setup the Oauth using their AD instead of the dev AD
- **Tasks to complete before next scrum:** Work on documentation for this sprint, work with Ayush and Tyler on minor problems and pain points for what they are working on to have an MVP by Thursday.
- **Any barriers or challenges encountered:** Microsoft was blocking and limiting the emails sent through the Graph API, though that was related to the new dev tenant and test email rather than the setup itself. Once the prod AD is used, this should not be a problem.

### EJ Jones

- **Tasks completed since last meeting:** Finished the email template and email.py for sending to client email.
- **Tasks to complete before next scrum:** Research sending emails back to Insighters Inc to give confirmation of the intake form being complete.
- **Any barriers or challenges encountered:** No major blockers so far

### Tyler Bish

- **Tasks completed since last meeting:** Fully integrated GraphQL API backend logic into Django web-app, ensuring secure backend handling of data with nothing exposed client-side.
- **Tasks to complete before next scrum:** Continue debugging Monday.com integration (business and personal intakes, edge case errors) and ensure all fields are properly mapped and stored in Monday.com boards.
- **Any barriers or challenges encountered:** Had some difficulty with initial implementation exposing API keys and PII to the front-end client-facing web application, reworked so all logic is handled in the backend and nothing is exposed.

### Ayush Singh

- **Tasks completed since last meeting:** Implemented the PDF autofill system structure, separating the logic into a mapping module for field matching and a PDF engine for generating and saving completed forms locally.
- **Tasks to complete before next scrum:** Finalize the mapping between form fields and PDF fields and test that generated PDFs save correctly in the local generated\_forms/individual directory.
- **Any barriers or challenges encountered:** No major blockers, mainly working through field mapping and ensuring the PDF template fields align with the form data.

## DATE4 - 3/10/26

- Met in Doster Hall from 3:00 - 3:20

Keegan Doyle

- **Tasks completed since last meeting:** Worked on the documentation for this sprint and worked with Ayush to debug the PDF submissions.
- **Tasks to complete before next scrum:** Continue to work with Ayush to debug the PDFs as well as investigate potential credential leak in DB, check for encryption on the token value.
- **Any barriers or challenges encountered:** Strange issue with fillable PDFs. The PDFs fill and are viewable in all PDF viewers except for Adobe Acrobat. Need to figure out why the filled fields are not visible in Acrobat.

EJ Jones

- **Tasks completed since last meeting:** Began working on the email confirmation template and completing the logic function in email.py needed to send the email back to admin users.
- **Tasks to complete before next scrum:** Continue to work and research sending automatic sending of email back to the admin.
- **Any barriers or challenges encountered:** Issues understanding how to set the return email up. I thought that the Microsoft Graph API could work but I believe I will run into problems with so.

Tyler Bish

- **Tasks completed since last meeting:** Tested and debugged edge cases for business and personal submissions. Implemented last name, first name formatting for individual submission with logic for same-last-name and different-last-name spouses.
- **Tasks to complete before next scrum:** Add more field mappings for monday.com and set up a cloud\_deployment branch with remote merging protections.
- **Any barriers or challenges encountered:** N/A

Ayush Singh

- **Tasks completed since last meeting:** Worked on debugging the PDF generation and fixed an issue where filled fields were not visible in Adobe Acrobat. Updated the PDF handling to improve cross-viewer compatibility and ensure fields render correctly.
- **Tasks to complete before next scrum:** Continue refining the PDF generation and finish mapping remaining model fields to the fillable PDF templates.
- **Any barriers or challenges encountered:** Ran into an issue where filled PDF fields were not appearing in Adobe Acrobat even though they worked in other viewers, which required additional configuration of the PDF form settings.

## DATE5 - 3/12/26

- Met in Bruno Library from 3:00 - 3:20

Keegan Doyle

- **Tasks completed since last meeting:** Began work on private cloud. Set up Cloud SQL as well as the environment variables in the cloudbuild.yaml
- **Tasks to complete before next scrum:** Finish private cloud deployment for this sprint. Work on making sure necessary permissions trigger cloud build.
- **Any barriers or challenges encountered:** Errors with cloud build. Need to figure out why the service account doesn't have the necessary IAM privileges. Need to comb through the debugging logs to finalize cloud deployment.

EJ Jones

- **Tasks completed since last meeting:** Edited view.py and email.py to create email sending functionality for the admin user. Also, edited the email\_confirmation templete with minor changes.
- **Tasks to complete before next scrum:** Push changes to the repo and continue work email sending. Add any feedback from sponsor.
- **Any barriers or challenges encountered:** None to report at this moment. Need to discuss future development endeavors after Cloud deployment begins.

Tyler Bish

- **Tasks completed since last meeting:** Added phone number field with specified country code mapping into Monday.com integration. Created cloud\_deployment branch with remote merge protections.
- **Tasks to complete before next scrum:** Add date and any other additional fields specified by sponsors following our meeting.
- **Any barriers or challenges encountered:** Multiple boards currently exist in the sponsor's Monday.com system with duplicate information, but different column mappings. Require confirmation and guidance from sponsor.

Ayush Singh

- **Tasks completed since last meeting:** Implemented PDF generation for the Business Intake form and connected it to the existing PDF generation system.
- **Tasks to complete before next scrum:** Make small adjustments to improve compatibility across different PDF viewers for both the Individual and Business forms.
- **Any barriers or challenges encountered:** Some inconsistencies with how different PDF viewers display filled fields, which required additional configuration.

## DATE6 - 3/13/26

- Met on Microsoft Team from 11:00 - 11:20

Keegan Doyle

- **Tasks completed since last meeting:** Set up a private cloud on google cloud with CI/CD triggers from pushing to the GitHub repo. Integrated Cloud SQL and Secret Manager properly. Need more work on Cloud Security.
- **Tasks to complete before next scrum:** Work on sprint documentation. Investigate cloud security and figure out shortcomings with current cloud deployment.
- **Any barriers or challenges encountered:** Continued errors with cloud build. My environment variables did not have a default fallback in the base.py so the build was crashing during the initial run before production.py maps secrets and env variables to the environment. Adding default dummy fallbacks fixed the cloud issues. Also had to add the live cloud links to the oauth environment for redirections.

EJ Jones

- **Tasks completed since last meeting:** Continued editing view.py and email.py to create email sending functionality for the admin user.
- **Tasks to complete before next scrum:** Push rest of changes and feedback to the repo and continue work email sending.
- **Any barriers or challenges encountered:** None to report at this moment

Tyler Bish

- **Tasks completed since last meeting:** Linked google cloud with github repository and confirmed monday.com integration is still functional with google cloud run deployment.
- **Tasks to complete before next scrum:** Compile documentation and validate accuracy of sprint 2 demo planning.
- **Any barriers or challenges encountered:** Security concerns with google cloud deployment since we were given literally 2.5 days to deploy to cloud with absolutely no prior warning that the sprint 2 demo would have to be deployed via cloud. Dr. Anderson needs to communicate better.

Ayush Singh

- **Tasks completed since last meeting:** Worked on PDF generation for both individual and business forms. Fixed issues with field visibility across different PDF viewers.
- **Tasks to complete before next scrum:** Finish refining PDF field mappings and ensure all form data is correctly populating and saving locally.
- **Any barriers or challenges encountered:** Minor issues with PDF compatibility across viewers, but mostly resolved.