



Sprint Planning Document (Sprint 1)

Sprint Goal Backlog (Sprint 1)

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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.
- **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.

- **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.
- **Secure Infrastructure:**
 - **Google Cloud Platform (GCP):** Host the application via Cloud Run and utilize Google Secret Manager to protect all API keys and database credentials.
 - **Docker:** Containerize the application and database for consistent local development and production deployment.

Sprint 1 Planning

Sprint 1 Goals:

1. **Understand the Client's Goals completely to better engineer a needed solution and research necessary tools.**
2. **Deploy and run the service through Docker.**
3. **Initiate a Django project for onboarding web form creation and use**
4. **Consistent Security Implementation**
5. **Local Database Setup**
6. **Begin setup of Google Cloud Platform and Google Secret Manager**
7. **Create draft of project website.**

Sprint 1 Deliverables:

- **Research the tools to be used in this project:**
 - **Assigned:** {Tyler Bish, Keegan Doyle, Ayush Singh, Ej Jones}
 - Research Django's form handling, security features, and validation methods.
 - Analyze the physical Business Intake and Individual Intake PDFs to map out all required data fields and get feedback from sponsors on these fields.
 - Review documentation for Docker Compose, PostgreSQL, and Google Cloud Platform.
- **Deploy and run the service through Docker:**
 - **Assigned:** {Keegan Doyle, EJ Jones}
 - Write the Dockerfile to handle system dependencies and Python requirements. (Keegan)
 - Create the docker-compose.yml file to configure the web service and the database service simultaneously. (Keegan)
 - Setup the Dockerfile as rootless to avoid security flaws. (EJ)
 - Write the cloudbuild.yaml for future cloud containerization. (EJ)
- **Initiate a Django project for onboarding web form creation and use:**
 - **Assigned:** {Keegan Doyle, Tyler Bish, EJ Jones}
 - Initialize the Django project and create the core app structure. (Tyler)
 - Build the base HTML templates (Home, Business Form, Personal Form) using Bootstrap 5. (Tyler, EJ, and Keegan)
 - Create the Django form classes and implement custom data validators (e.g., Regex for SSNs, phone numbers, and FINs). (Keegan)

- Create admin page HTML and backend logic for Insighters Inc employees (EJ)
- **Consistent Security Implementation:**
 - **Assigned:** {Tyler Bish, EJ Jones, and Ayush Singh}
 - Ensure highly sensitive PII (SSNs, Bank Routing numbers) is explicitly excluded from database models. (Ayush)
 - Configure Django security settings (SECURE_SSL_REDIRECT, SESSION_COOKIE_SECURE, CSRF protections) (Tyler)
 - Temp Login Logic and Implementation (Tyler)
 - Temp Login Frontend (EJ)
- **Local Database Setup:**
 - **Assigned:** {Ayush Singh}
 - Configure PostgreSQL within the docker-compose.yml file and establish persistent volumes for local data storage.
 - Create Django Models (BusinessIntakeSubmission and PersonalIntakeSubmission) to store non-sensitive form data.
 - Handle form submission and data entry into the database
 - Handle security and encryption for certain database fields
- **Begin setup of Google Cloud Platform and Google Secret Manager:**
 - **Assigned:** {Keegan Doyle and Tyler Bish}
 - Set up a split-settings environment (base.py, local.py, production.py). (Tyler)
 - Implement local .env file reading for local Docker development. (Tyler and Keegan)
 - Conn Integrate google-cloud-secret-manager in the production settings to fetch sensitive API keys and database URLs dynamically from GCP. (Keegan)
 - Create init scripts for the GCP project (Keegan)
- **Create Project Website:**
 - **Assigned:** {Keegan Doyle}
 - Create the first draft of the project website outlining the Insighters Workflow Automation goals.
 - Host the website with GitHub pages.
 - Include an about page for the team and a page for all sprint deliverables.
 - Update website with completion of each sprint.