PRODUCT REQUIREMENTS DOCUMENTATION

General Overview

Project Name	PI Portfolio
Description	PI Portfolio is a mobile app for Principal Investigators (aka Faculty Researcher) to be able to check the financial health of their research grants
User Problems	PIs are very busy, not only overseeing their research projects and managing their research staff, but they also have the responsibility of teaching as well. They need quick access on the go (via mobile) to check the financial health of their research projects so they can better plan their research progress and make better informed decisions that can optimize their research output
Business Goals	- PIs will be able to make better and efficient decisions on the progress of their research grants - PIs will be able to provide more accurate reporting and planning to their research sponsors - Minimize risks of research grants being overspent - Minimize financial compliance risks

Assumptions

- Because of the security sensitivity of financial information, it is assumed the PI will already have their research institution's IT department download the PI Portfolio app on their mobile phone. => No need to create flow for onboarding PI
- The research institution's financial system already takes care of linking research grants and accounting to the PI's profile through their own contract and accounting process. => No need for the PI to add research accounts through the app
- The research institution provides an accountant or research administrator to assist the PI in managing their research grants => Assume the accountant/research administrator inputs projections (i.e recurring salaries, research supplies, etc) so PI can see both overall balance and "projected" balance

User's Stories

Story No.	User Story	Priority
1	The user logs into PI Portfolio through their mobile phone using	Must Have

	their username, password, and facial ID recognition (for enhanced security)	
2	Once the user is successfully logged in, the user is be able to see the overall account summary of all their active research grants	Must Have
3	The user see the title of their research grant, overall account balance, the sponsor's name, and the start and end date	Must Have
4	The user can toggle between seeing overall account balance vs. projected balance.	Must Have
4.1	The overall vs. projected balance toggle should be saved throughout the logged-in session	Nice to have
4.2	The default option is "overall" balance, but user can set the option in settings and save it	Nice to have
5	The user taps on the specific research grant and is taken to the detail page of the research grant	Must Have
5.1	The user can see the same overview information from the account summary page, plus additional following additional information: - Transaction details last 30 days, or first 15 transactions - Toggle button for "overall" vs "projected" balance	Must Have
5.2	On the detail page, the user can see the quick link to the submitted Research Progress Reports and Financial Reports	Nice to have
5.2	On the detail page, the user can see the quick link to "projections"	Nice to have

Out of Scope
- PIs are not able to make actionable transactions, such as transferring expenses, requesting additional funding, approving funding and expenses, and close funding.

MVP
- A mobile app for PIs to be able to view all of their active research grant balances and expenses.