

Meeting with Corrine Notes (10/24/2023)

Feedback

Overall Corrine liked what we had to show her in terms of what we had finished frontend wise for a grant dashboard. We also showed her a few wireframes on how we are planning on implementing the grant show page and all the tabs that come with it.

Below is some feedback from Corrine in the form of notes that she mentioned about certain features we will be implementing this sprint/

Charts

- Corrine was a little confused from the charts at first but we explained to her that the charts at the moment are made up of placeholder data and does not reflect what will actually be there, but she did like the idea of the charts and how they looked.

- Corrine mentioned that she sees no reason for a visual to be on an employee show page. However a visual will be required for a grant show page

- Pie charts will need to be added in terms of transactions/balance and she would like them on the grant show page.

Grant Dashboard

Progress Bar

- Corrine would like the progress bar to be color-coded (red if it is almost at the end)

- Have it in 3rds for now

- 0% - 33% green

- 34% - 66% yellow

- 67% and over red

- Corrine would like the button to create a grant to be at the top of the grant dashboard page

- Corrine would like the functionality for only filtered rows to be exported as a CSV or Excel file

- Corrine would like the ability to remove and re-add columns

Reports

Regarding labor and effort reports

- Corrine wants to be able to view 1 employee across multiple grants
- labor report (most of the time it will be just on one grant for the PI)
 - multiple grants should be considered however
- Effort report for 1 grant but also across multiple grants should be considered
- Employee Reports (across 1 grant)
- Budget report would ideally be specifically for 1 grant

Transactions she gets from Banner (she doesn't calculate them herself)

- Sometimes funding is provided year by year but other times it is provided all at once (these are the only times that she would go in and manually change something)
 - Total balance should not be affected (employee should not be able to spend that)
- She would still like the big picture when it comes to balance in the form of a chart it comes to Pie charts (Pie charts will need to be added)
- We will need to keep track of how much money is awarded per year
- Editing the values in place (Transactions)

Sponsor Dates are usually on specific dates each year for the most part (When a PI gets allotted their money is the usually the same as when the start date for a grant is)

Fields for Grant creation / Editing of an existing grant

- Corrine wants the ability to add CO-PI's to a grant (static CO-PI)