

Project Requirement Document: Financial Dashboard and Reporting Platform

Project Overview The platform is being developed to process financial data files downloaded from Corpository, which will be in Excel and PDF formats. This data will be stored in a database and used to:

1. Display a financial dashboard with visualizations.
2. Generate automated reports for user consumption.

Scope of the Project

- 1. Input Processing**
 - Accept data files (Excel and PDF) uploaded by users.
 - Parse and validate the uploaded files.
 - Extract financial data and store it in a structured database.
- 2. Data Storage**
 - Design and implement a robust database schema for financial data.
 - Ensure data integrity and security during storage.
- 3. Financial Dashboard**
 - Display key financial metrics in an interactive dashboard.
 - Provide graphical visualisations such as bar charts, pie charts, and trend lines.
- 4. Automated Report Generation**
 - Generate comprehensive financial reports.
 - Provide options for exporting reports in PDF or Excel format.
- 5. Future Scope**
 - Integrate with Corpository API to fetch data directly.
 - Enhance AI-driven insights for anomaly detection and trend prediction.

User Journey

- 1. User Login and Authentication**
 - The user logs into the platform using secure credentials.
 - Role-based access ensures only authorized users can upload files or access reports.
- 2. Data File Upload**
 - The user navigates to the "Upload Data" section.
 - Uploads an Excel or PDF file downloaded from Corpository.
 - The system validates the file format and checks for errors.
- 3. Data Parsing and Storage**
 - The platform extracts relevant financial data from the uploaded file.
 - Data is stored in a relational database with an organized schema.
- 4. Dashboard Interaction**
 - The user accesses the "Dashboard" to view financial KPIs.
 - Interacts with dynamic charts, filters, and tables.
- 5. Report Generation**
 - The user navigates to the "Reports" section.
 - Downloads or views the generated report.
- 6. Future Integration**
 - User enables API-based data retrieval to eliminate manual file uploads