**Financial Dashboard**

**Business Requirements Document**

**Version Number: 2.0**

**Date: 2024/10/11**

**Revision History**

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Version | Description | Author |
| October 10 2024 | 1.0 | First Draft | Junelle Winston |
| October 11 2024 | 2.0 | Refine requirements and assign priorities. | Junelle Winston |
|  |  |  |  |

**Table of Contents**

**1. Introduction ………………………………………………………………………3**

**1.1 Problem Statement……………………………………………………….3**

**1.2 Business Goals…………………………………………………….……….3**

**1.3 Business Objectives………………………………………………………3**

**2. Proposed Solutions…………………………………………………………….4**

**2.1 Description of the Solution……………………………….…………….4**

**2.2 Functional Requirements……………………………………………….4**

**3. Evaluation………………………………………………………………………….5**

**3.1 Key Feature……………………………………………………………………5**

**3.2 Feature Review……………………………………………………………….5**

1. **Introduction**
   1. **Problem Statement**

The business intends to create a straightforward functional financial tool that prioritizes the display of account balances. This tool is targeted to simplify desktop access to financial data while satisfying accessibility needs.

* 1. **Business Goals**
     1. Simplicity and Accessibility- very easy to use for anyone without technical expertise
     2. Ease of use target for Desktop users only for this release.
     3. Clean display of account balances, recent transactions and spending categories.
  2. **Business Objectives**

1.3.1 Instant access to a summary of account balances and recent transactions.

1.3.2 Visual clarity which allows readability to be maximum

1.3.3 Categorization of transactions based on items purchased.

**2. Proposed Solution**

**2.1 Description of the Solution**

The project consists of a simple, functional financial dashboard for computer users. The interface is clean and intuitive and provides a display of account balances and categorization of transactions. It caters to users with no technical expertise and accessibility restrictions.

**2.2 Functional Requirements**

|  |  |
| --- | --- |
| Use Case ID | 1.0 |
| Use Case Name | Display Account Balances |
| Actors | End user |
| Pre-Conditions | The client has entered his username and password and has successfully passed authentication. The client has logged in into the application. |
| Primary Steps | none |
| Alternate Steps | none |
| Post Conditions | The client can view account balances for all accounts on his dashboard. |
| Business Objective | [1.4.1] Instant access to a summary of account balances and recent transactions. |
| Priority | High |

|  |  |
| --- | --- |
| Use Case ID | 2.0 |
| Use Case Name | Display Account Transactions |
| Actors | End user |
| Pre-Conditions | The client has entered his username and password and has successfully passed authentication. The client has logged in into the application. |
| Primary Steps | The user selects the account to view. |
| Alternate Steps | none |
| Post Condition | The user can view the selected account number, current balance and the recent transactions for that account. |
| Business Objective | [1.4.1] Instant access to a summary of accounts balances and recent transactions. |
| Priority | High |

|  |  |
| --- | --- |
| Use Case ID | 3.0 |
| Use Case Name | Display Summary of Accounts |
| Actors | End user |
| Pre-Conditions | The client has entered his username and password and has successfully passed authentication. The client has logged in into the application. |
| Primary Steps | none |
| Alternate Steps | none |
| Post Condition | The user can view all the various accounts he owns in each category. |
| Business Objective | [1.4.1] Instant access to summary of account balances and recent transactions. |
| Priority | High |

|  |  |
| --- | --- |
| Use Case ID | 4.0 |
| Use Case Name | Visual Clarity |
| Actors | End user |
| Pre-Conditions | The client has entered his username and password and has successfully passed authentication. The client has logged in into the application. |
| Primary Steps | none |
| Alternate Steps | none |
| Post Conditions | The dashboard is divided into several tables of account categories. Each category has a list of client accounts displayed showing the account number and balance. |
| Business Objective | [1.4.3] Visual clarity which allows readability to be maximum |
| Priority | High |

|  |  |
| --- | --- |
| Use Case ID | 5.0 |
| Use Case Name | Categorization |
| Actors | End user |
| Pre-Conditions | The client has entered his username and password and has successfully passed authentication. The client has logged in into the application. |
| Primary Steps | The user selects the account in the desired category to view. |
| Alternate Steps | none |
| Post Conditions | The dashboard displays the selected account, the account number, the current balance and each transaction. Each transaction is identified by type of item purchased. |
| Business Objective | [1.4.3] Categorization of transactions based on items purchased. |
| Priority | Low |

1. **Evaluation**

**3.1 Key Feature**

The most valuable and feasible feature for this project is Use Case ID 4.0 Visual Clarity. This use case empathizes the key objective of this project, clear concise financial information that is easily accessible to the end user.

**3.2 Feature Review**

To complete my evaluation of the requirements, I have added a Priority section to each use case. I consider Use Case ID 5.0 to be the lowest priority. Although it is useful to know the category of spending for each transaction, a dashboard is not the ideal way to display this data. I believe it would be best served if the data is displayed in the form of a pie chart.