



# Product Requirements Document (PRD)

## iiE Customer Portal (SaaS)

### Document purpose

This PRD defines *what must be built and why* for the iiE Customer Portal. It details the product scope, success criteria, and delivery alignment across design, engineering, audit, and stakeholders.

For visualisation (not authoritative design):

<https://www.figma.com/make/qJ0coVgdlzYJycXaDTGtcs/iiE-Portal-Design-V2?fullscreen=1&t=ZGbU4fVnVbLEE3FM-1>

## 1. Background & problem statement

Investors in the Environment (iiE) members require a single, auditable SaaS platform to:

- Configure organisational structures
- Capture and analyse resource and carbon data
- Set objectives and actions
- Submit audits and receive accreditation outcomes

Current processes are fragmented, making it more challenging to audit, introducing potential inconsistencies across members, creating delivery risk, and limited insight over time.

## 2. Product vision

Deliver a clear, trusted, audit-grade customer portal that enables iiE members to measure, manage, and improve environmental performance with confidence, while allowing iiE to assess, score, and accredit consistently.

The platform must be:

- Auditable (clear history, versioning, and evidence)
- Scalable (future criteria, metrics, and members)
- Simple for non-technical users



### **3. Goals & success metrics**

#### Primary goals

1. Enable members to accurately track resources and carbon over multiple years
2. Support objective-driven performance improvement
3. Provide a robust audit and accreditation workflow

#### Success metrics

- ≥90% of members complete annual data entry without support
- Consistent accreditation outcomes for identical data sets
- Positive auditor feedback on clarity and evidence traceability

### **4. In-scope**

- Organisation setup (organisation / division / site)
- Resource setup and tracking
- Carbon footprint calculation and reporting
- Objectives and action planning
- Audit submission, scoring, and reporting
- Historical data visibility and versioning
- Benchmarking between members

### **5. Out-of-scope**

- Financial billing and invoicing
- Public reporting
- Automatic external data integrations (initial release)

### **6. Users & personas**

#### Member User

- Sets up organisation and sites
- Enters and reviews data
- Manages objectives and actions
- Submits audits

#### Auditor (iiE)

- Reviews submissions
- Scores audits
- Uploads findings and recommendations



## iiE Administrator

- Manages system configuration
- Oversees accreditation outcomes

## 7. Functional requirements

### 7.1 Organisation setup

- Users must configure organisational structure via a guided wizard
- Support single-organisation and corporate structures
- Support multiple reporting years with a single baseline year

### 7.2 Resource setup & tracking

- Users must select resource groups, types, and options
- Data entry must be context-filtered and validated
- Aggregation only permitted where resource definitions match exactly

### 7.3 Carbon footprint

- Automatically calculated from resource data
- Support manually calculated emissions, and homeworking emissions
- Support offset tracking (non-deductive)

### 7.4 Objectives & actions

- Objectives may be resource-linked, carbon-linked, or standalone
- Actions may reference objectives and organisational elements
- Objectives and actions must not own source data

### 7.5 Audit & accreditation

- Sectioned audit questions with evidence upload
- Deterministic scoring rules
- Generated audit report with strengths, improvements, and actions

## 8. Non-functional requirements

- UK English throughout
- WCAG-compliant UI patterns
- Full audit trail for data changes
- Role-based access control
- Secure document and evidence storage

## 9. Data & rules (summary)

- Organisation → Division → Site → Resource → Data Entry



- Editing historical data creates a new version
- Finalising years lock calculations, not visibility
- Section score = total of question scores
- Overall accreditation = total of scores

## **10. Dependencies & assumptions**

### Dependencies

- Final accreditation criteria definitions
- Carbon conversion factors

### Assumptions

- Users may have incomplete historical data

## **11. Acceptance criteria (release-level)**

- A member can complete a full reporting year end-to-end without manual intervention
- Auditors can trace every score to source data and evidence

## **12. Future considerations (not committed)**

- API integrations (utilities, travel providers)
- Automated anomaly detection