

# REPORT OF FINAL PROJECT WEB DESIGN

## Personal Finance Dashboard Final Project Report

**Course:** INFO 6150 - Web Design and User Experience Engineering

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### 1. Project Description

#### Purpose

- **Problem:** Poor financial management and a lack of awareness about spending habits.
- **Solution:** The **Personal Finance Dashboard** helps users track, visualize, and manage their finances effectively, promoting better budgeting and savings.

#### Target Users

- Budget-conscious individuals.
- Students and young professionals who aim to manage expenses and set savings goals.

#### Expected Results

- Provide users with an interactive platform to monitor income, categorize expenses, and visualize savings.

### 2. Persona Analysis

#### Persona 1: Budget-Conscious Student

- **Demographics:** 22 years old, college student, limited income from part-time work.
- **Goals:** Track expenses, save for tuition, and minimize non-essential spending.
- **Pain Points:** Difficulty tracking daily expenses and understanding spending patterns.

#### Persona 2: Young Professional

- **Demographics:** 27 years old, entry-level employee with a stable income.
- **Goals:** Save for long-term goals like a house or car.

- **Pain Points:** Challenges in categorizing expenses and setting savings goals.

### 3. User Journeys

#### User Journey 1: Tracking Income and Expenses

- **Actions:** Input monthly income, categorize expenses, view balance.
- **Opportunities:**
  - Simplify transaction input with pre-defined categories.
  - Provide a clear summary of spending habits.

#### User Journey 2: Setting Savings Goals

- **Actions:** Define a savings target, track progress with visual indicators.
- **Opportunities:**
  - Include motivational messages upon milestones.
  - Provide tips for increasing savings.

### 4. Sitemap and Processes

#### Sitemap

/ (Dashboard)  
├ Income & Expenses  
├ Savings Goals  
└ Reports

- **Dashboard:** Overview of finances with a graphical representation.
- **Income & Expenses:** Add, edit, or delete transactions.
- **Savings Goals:** Define and track progress toward goals.
- **Reports:** Monthly summaries with graphs.

#### Processes

- **Income & Expense Tracker:**
  - Input income → Categorize expenses → Calculate total balance.
- **Savings Goals:**
  - Set target → Update progress → Visualize milestones.

### 5. Low-Resolution Mockups

#### Mockup 1: Dashboard

- Overview of income, expenses, and savings.

- Includes a pie chart for expense distribution and a bar graph for monthly savings.

## Mockup 2: Savings Goals

- Interactive form for setting goals.
- Progress bar to track milestones.

## 6. Typography and Color Palette

### Typography

- Font Choices:
  - Headings: Lato for a professional, clean look.
  - Body Text: Roboto for readability.

### Color Palette

- Primary Colors:
  - Blue (#2196F3): Represents trust and reliability.
  - Green (#4CAF50): Indicates growth and success.
- Secondary Colors:
  - Gray (#424242): Provides contrast.
  - Orange (#FF9800): Highlights key elements.

## 7. Website Code and Deployment

- The website was developed using **HTML**, **CSS**, and **JavaScript**.
- Data is stored locally in the browser using **LocalStorage**.
- The project is hosted in a GitHub repository, accessible here.
- Includes two pages:
  - **Dashboard**: Displays income, expenses, and savings.
  - **Savings Goals**: Allows users to set and track financial goals.
- **Quality Assurance**:
  - Code adheres to industry standards.
  - Tested for responsiveness and functionality on multiple browsers.

## 8. Specialty Requirements

### Option 1: User Research

#### How do you currently manage your finances?

Most people use spreadsheets or apps, but some still rely on memory or don't track regularly.

### **What challenges do you face when managing your finances?**

Forgetting to log expenses and difficulty categorizing spending are common problems.

### **What features do you wish were available in financial tools?**

Users want clear visual graphs and tools for setting and tracking savings goals.

### **Would visual representations like graphs help you understand your finances better?**

Yes, visual aids like graphs make it easier to see where the money is going.

### **How important is it for you to set financial goals and track them?**

Very important, as it helps with staying motivated and focused on saving.

### **Would you prefer your financial data to be stored locally or on the cloud?**

Most people prefer local storage for privacy reasons.

### **How often do you review your financial activity?**

Weekly reviews are common, but some only check monthly or when issues arise.

### **What would make you use a new financial dashboard?**

Simplicity, ease of use, and meaningful insights that save time and effort.

Based personas on survey results.

### **Option 2: Delightful Design**

- Applied advanced design principles for a professional look with CSS.
- Created mockups with an effective design flow, guiding the user's attention.

### **Option 3: Javascript Mastery**

- Utilized advanced JavaScript techniques:
  - LocalStorage for data persistence.
  - Dynamic graph generation using Chart.js.
  - Form validation for accurate user input.

## **9. Future Scope and Learnings**

### **Future Scope**

- **Backend Integration:** Incorporate a database for secure data storage.
- **Advanced Analytics:** Offer detailed insights into spending patterns.

- **Multi-User Support:** Enable shared budgeting for families or groups.

## **Learnings**

- Enhanced skills in front-end development, user-centered design, and responsive web design.
- Gained valuable insights into team collaboration and project management.

## **10. Conclusion**

The **Personal Finance Dashboard** project demonstrates the practical application of front-end web design principles. By addressing a common problem with a user-focused approach, it provides a valuable tool for improving financial literacy and budgeting skills.

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