

DESIGN SPRINT: DOCUMENTATION

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EPA-EQUITY PRO ADVISORS

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Background

Background

Equity Pro Advisors (EPA), a prominent consulting firm specializing in financial equity and strategic advisory services, recognized the critical need for an efficient dashboard as its client base and project portfolio expanded. The dashboard would serve as a vital tool for monitoring project health, profitability, and financial metrics, while also facilitating informed decision-making. Our challenge was to create a dashboard that met functional requirements and prioritized user experience (UX). To address this challenge, we embraced the design sprint framework—a time-bound, collaborative approach. This paper documents our journey in designing the dashboard for Equity Pro Advisors, EPA, highlighting the additional features incorporated to further assist managers and project leads.

Objective: Propose layouts for a dashboard interface that will help the company's management and team leaders optimally track, review and manage projects in real time.

Design Team:

- Jeremiah Modzuka - UX Designer
- Prince Mulea - UX Designer
- Wendy Gumede - UX Designer
- Lwando Madebe - UX Designer

Key Stakeholders:

- **Management Team:** To see all projects.
- **Project Leads:** They are primarily interested in their projects, but they can access all project information if required.

Goals:

- Create a seamless, user-friendly dashboard that houses the following functionalities: Project Overview, Analysis of Projects, Financial Reports, Task Management, Scheduling

Resources:

- Figma
- Google Material Design
- Canva (Graphical Illustrations)

Design Sprint

Schedule:

- **Day 2: Ideate**

During day two of the design sprint. The team held 3 meetings, one in the morning, evening and afternoon. During the morning meeting, the team took a good look at the brief, to read and understand the needs of the users. The task that EPA has

assigned to the team was broken down into smaller chunks. Team members took a turn explaining to the others how they understood the brief. This exercise was to ensure that everyone was on the same page when it comes to understanding what had to be done. Team members were then given time to brainstorm ideas and provide basic sketches of what the dashboard should look like.

The second meeting of day 2 was held during the day where each member presented their sketches of the dashboard. The other team members were encouraged to ask questions in order to test the team members understanding of what they had created. This was to reduce any incongruity that might arise at a later stage of the project. After hearing the presentations and understanding the perspectives of each designer. The meeting was adjourned

The last meeting of day 2 was held in the evening this is where designers picked what they like the most about each design that was presented. Upon completion of this task, the team had an idea of what they needed to create and what the final dashboard would look like. Each team member was assigned with a dashboard screen that they had to create individually.

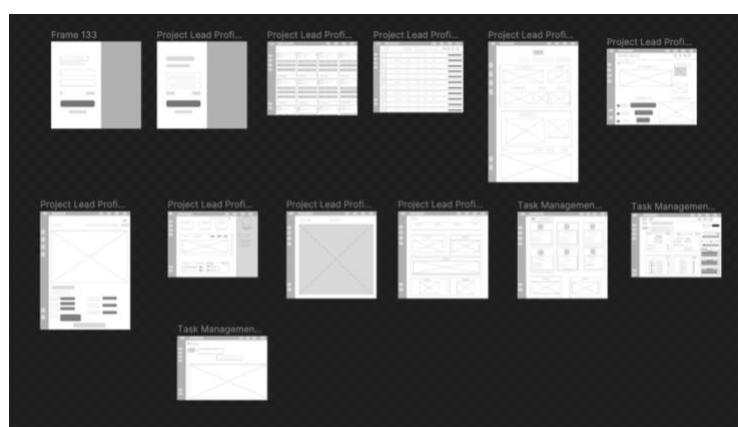
Challenges

There were multiple challenges that the designers had to overcome during day 2. The first problem we encountered was some of the designers interpretation of the brief. Some designers could not fully understand the brief and what was being expected of everyone in the team. Another challenge was the fact that some designers were unable to see the vision of others. We had to overcome these challenges by being patient and working through the brief over and over again, we resolved the second problem by taking inspiration from all the dashboards and combining them into one.

[Low-fi Mobile Wireframes]



[Low-fi Desktop Wireframes]



Day 3: Decide

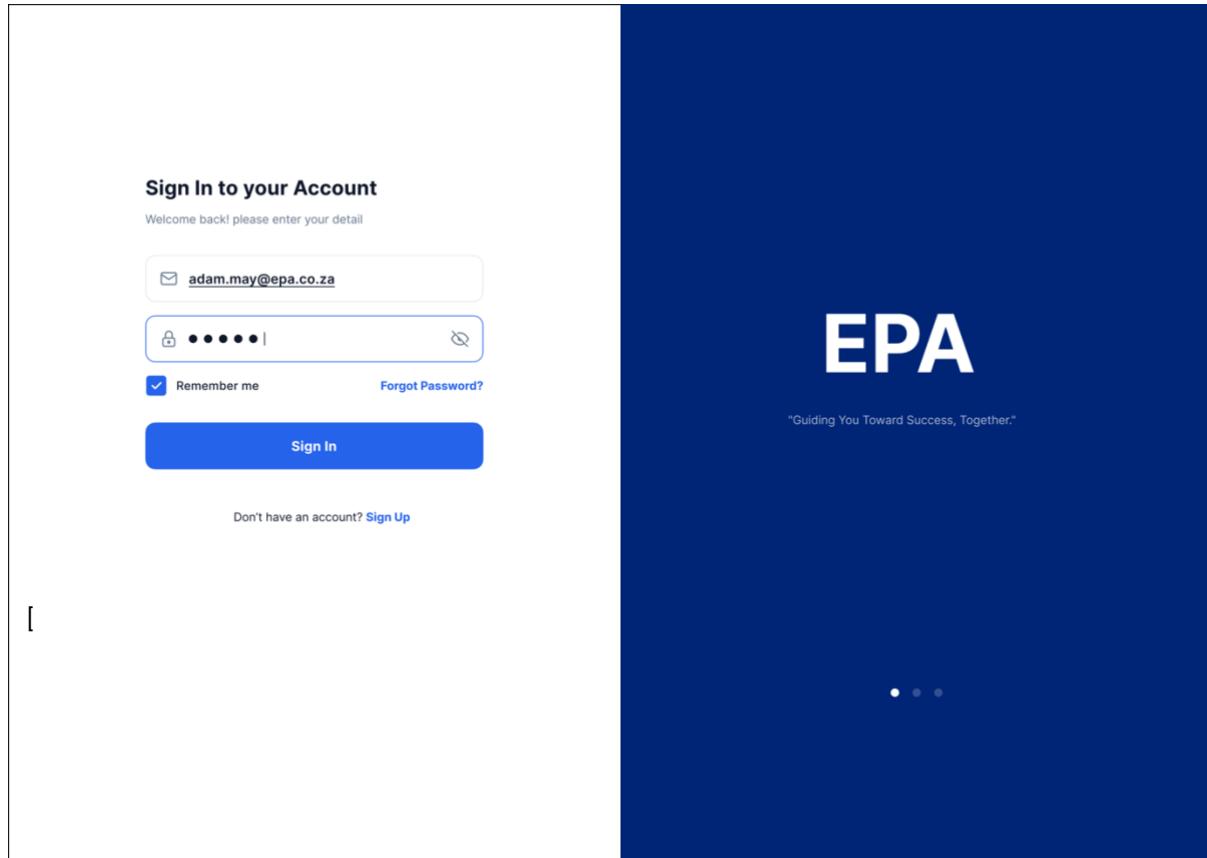
Day 3 of the UX design sprint was an important stage for the team as we started to converge on all our possible solutions and began to prototype and test our different ideas. In the morning we had a recap and review session of the multiple low-fidelity wireframes and their workflow and a review of the insights gained from the research we performed on system usability, functionality and user experience of similar designs. After the review we decided on the wireframe user flows, based on what the different users, the different team members, team lead, and team manager aim to achieve from using the platform. This involved mapping out the steps users will take to accomplish their goals within the platform. We followed this step with sketching out potential solutions for the user flows, in preparation for the high-fidelity wireframes. This process was followed by a quick review discussion where we shared our different ideas and looked at common themes throughout the group and innovative solutions. After lunchtime, based on the sketches and discussions, we created storyboards and user journey maps to visualize how users will interact with the proposed solutions. This helped identify potential pain points and areas for improvement. We then moved onto Figma and began prototyping the key features and interactions of the proposed solution. This included creating wireframes and more low-fidelity prototypes to test with our peers later in the day. We then prepared for user testing by creating a test plan, including a questionnaire they would answer post working through the workflow, defining tasks for users to complete during testing, and setting up the testing environment. Based on feedback from our classmates we refined the prototypes, making adjustments to improve usability and address the small issues identified and improve user experience.

At the end of the day we conducted the usability testing, observing how our peers interacted with the prototypes and gathered feedback through a survey. Moving onto the last phases we debriefed and discussed the insights gained from the testing and identified pain points, and areas of strength in the prototypes.

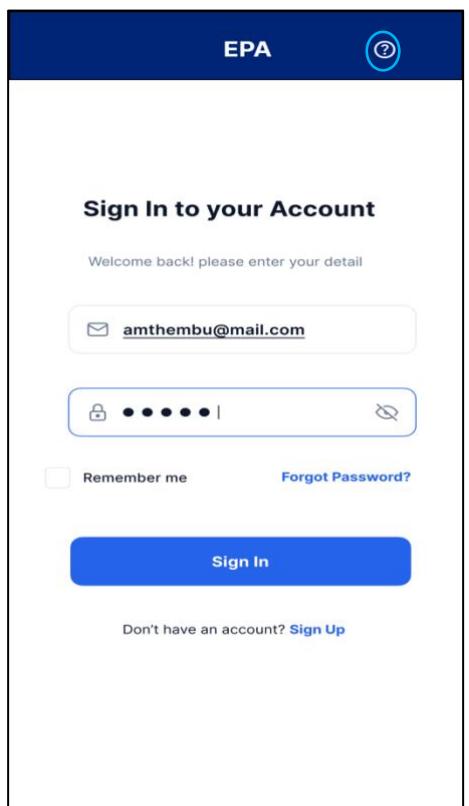
Day 4: Prototype

- Morning: Prototyping tools and methods
- Afternoon: Prototype development

[High-fidelity Wireframes – Log In]
[Desktop]



Mobile]

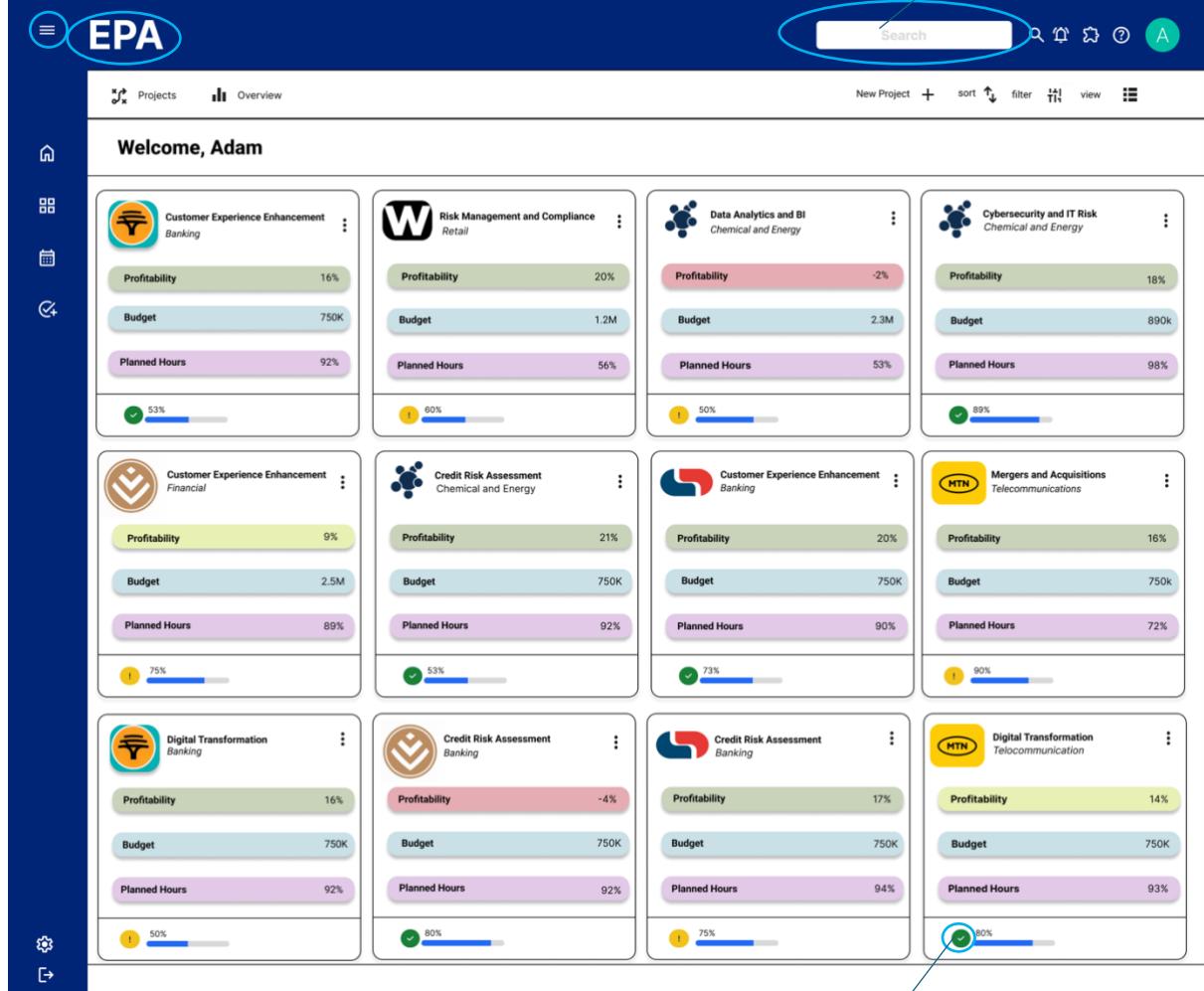


Login Page
(Project Manager Desktop)
The login page initiates identification of a specific user affiliated with the consulting firm. The user is required to enter their platform registered email address, followed by their personal password for identification purposes. If the user does not have an email address registered on the platform, they then have access to clicking the 'sign up' call to action, where the user will then be redirected to the registration page.

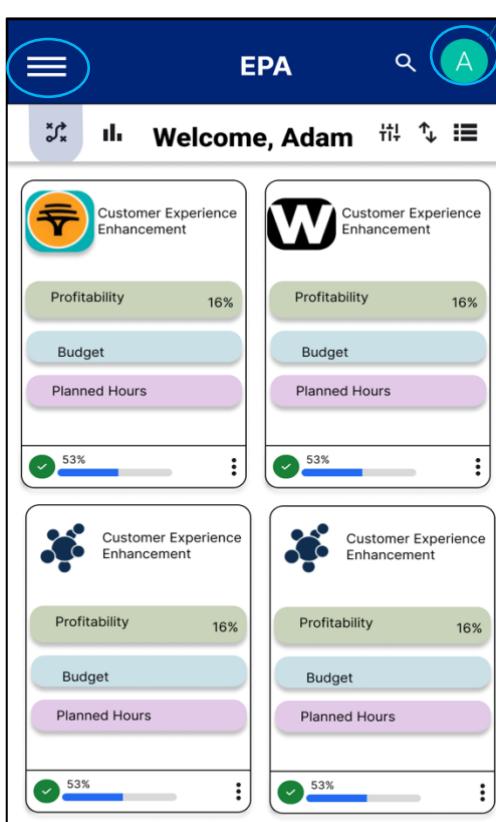
On the right-hand side of the login page, we have the consulting firm's logo and slogan, introducing the user to the organization's theme of the platform. In the example above we have the project manager logging onto the platform starting the project manager workflow. There's also the option to check the 'remember me' checkbox to keep the personal information saved on the platform and avoid re-entering the personal information upon logging in each time on the platform. Once all the project manager details are filled in and necessary information is on the page the project manager clicks the 'sign in' button to access the platform.

Login Page (Project Manager mobile)
The login page initiates identification of a specific user affiliated with the consulting firm. The user is required to enter their platform registered email address, followed by their personal password for identification purposes. If the user does not have an email address registered on the platform, they then have access to clicking the 'sign up' call to action, where the user will then be redirected to the registration page. In the example we have the project manager logging onto the platform starting the project manager workflow. There's also the option to check the 'remember me' checkbox to keep the personal information saved on the platform and avoid re-entering the personal information upon logging in each time on the platform. Once all the project manager details are filled in and necessary information is on the page the project manager clicks the 'sign in' button to access the platform. The user can also reset their password by clicking the 'forgot password' call to action.

[High-Fidelity, Management Team Landing Page]
[Desktop]



[Mobile].



Profile icon.

Alert Icon: Green: No review, Yellow: Alert review

Management team: Landing Page
[Desktop]

When managers log into the screen, they see all the projects grouped by different clients. The dashboard overview uses cards to display essential information like profitability, budget, and hours spent. The profitability colour changes based on the current status: red for below 0%, yellow for 0-15%, and green for above 15%. This quick visual helps managers assess client profitability without reading lengthy details. The cards also include a progress bar showing project completion. Next to it, a green circle indicates everything is on track, while a yellow circle flags projects for review. The team chose cards for the purpose of visualising this information for their modular structure which makes information organization easy.

[High-Fidelity, Management Team Landing Page, Changed View]
 [Desktop]

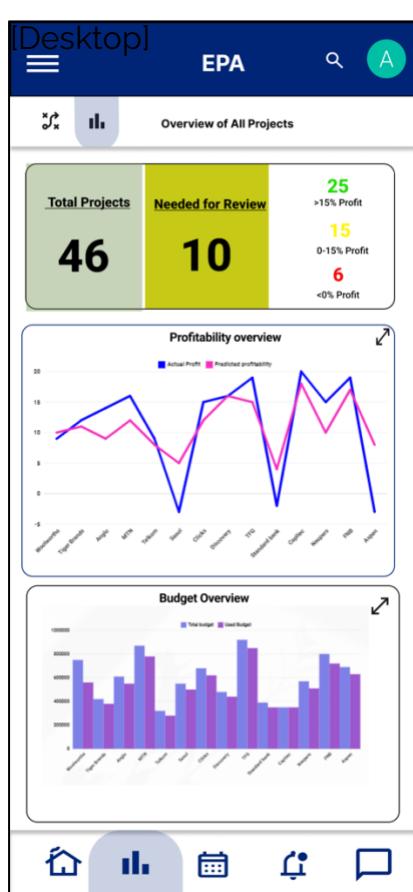
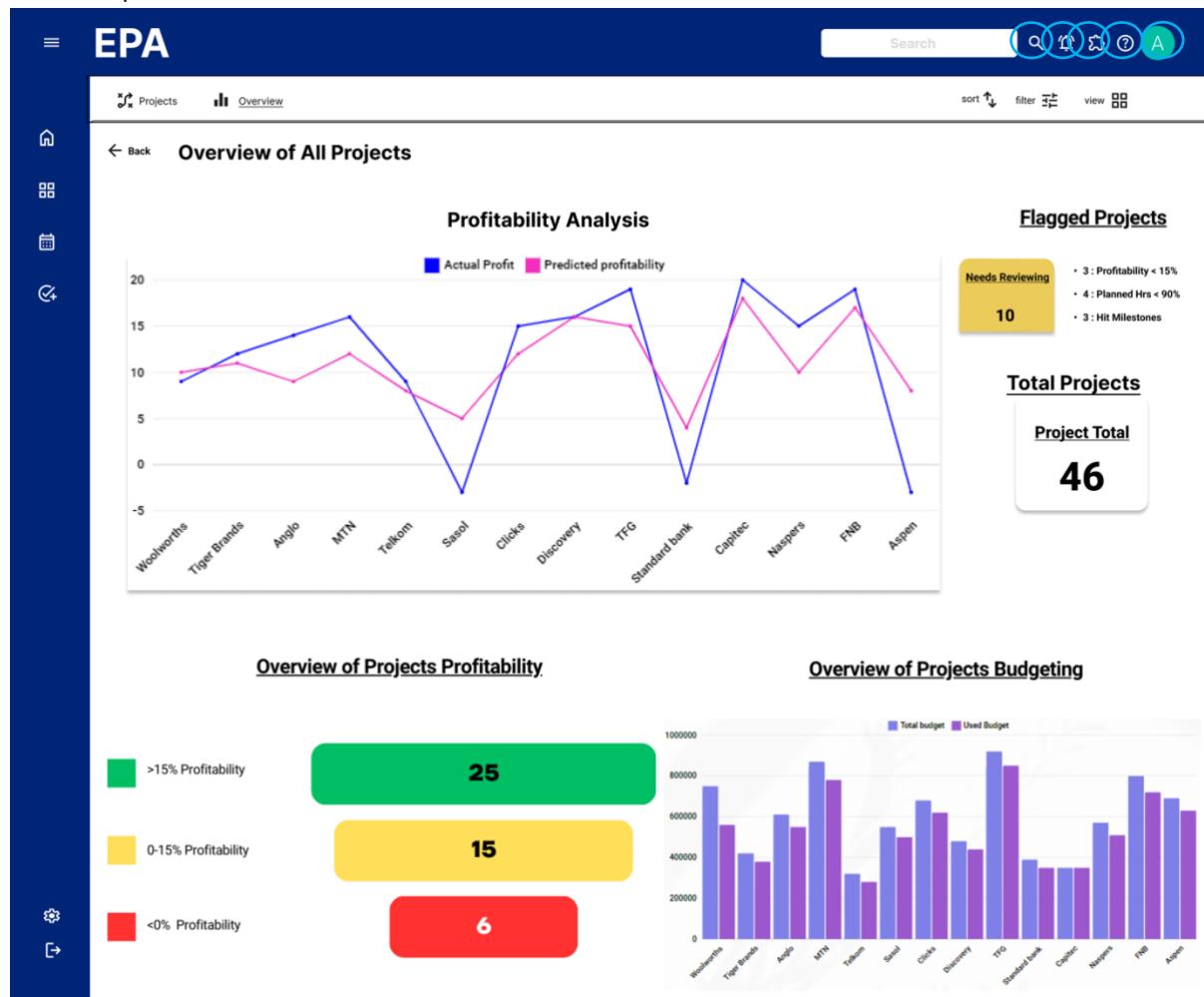
Project	Industry	Progress (%)	Budget	Planned Hours	Status
Customer Experience Enhancement	Banking	16%	740K	92%	Green
Data Analytics and BI	Retail	16%	740K	92%	Yellow
Cybersecurity and IT Risk	Chemical and Energy	16%	740K	92%	Yellow
Customer Experience Enhancement	Financial Services	16%	740K	92%	Green
Credit Risk Assessment	Banking	16%	740K	92%	Yellow
Customer Experience Enhancement	Banking	16%	740K	92%	Green
Mergers and Acquisitions	Telocommunication	16%	740K	92%	Yellow
Customer Experience Enhancement	Retail	16%	740K	92%	Green
Customer Experience Enhancement	Retail	16%	740K	92%	Yellow
Customer Experience Enhancement	Banking	16%	740K	92%	Green

[Mobile]

Users can switch between card and list views, accommodating those familiar with traditional interfaces like email clients or file managers. This familiarity enhances usability for certain users

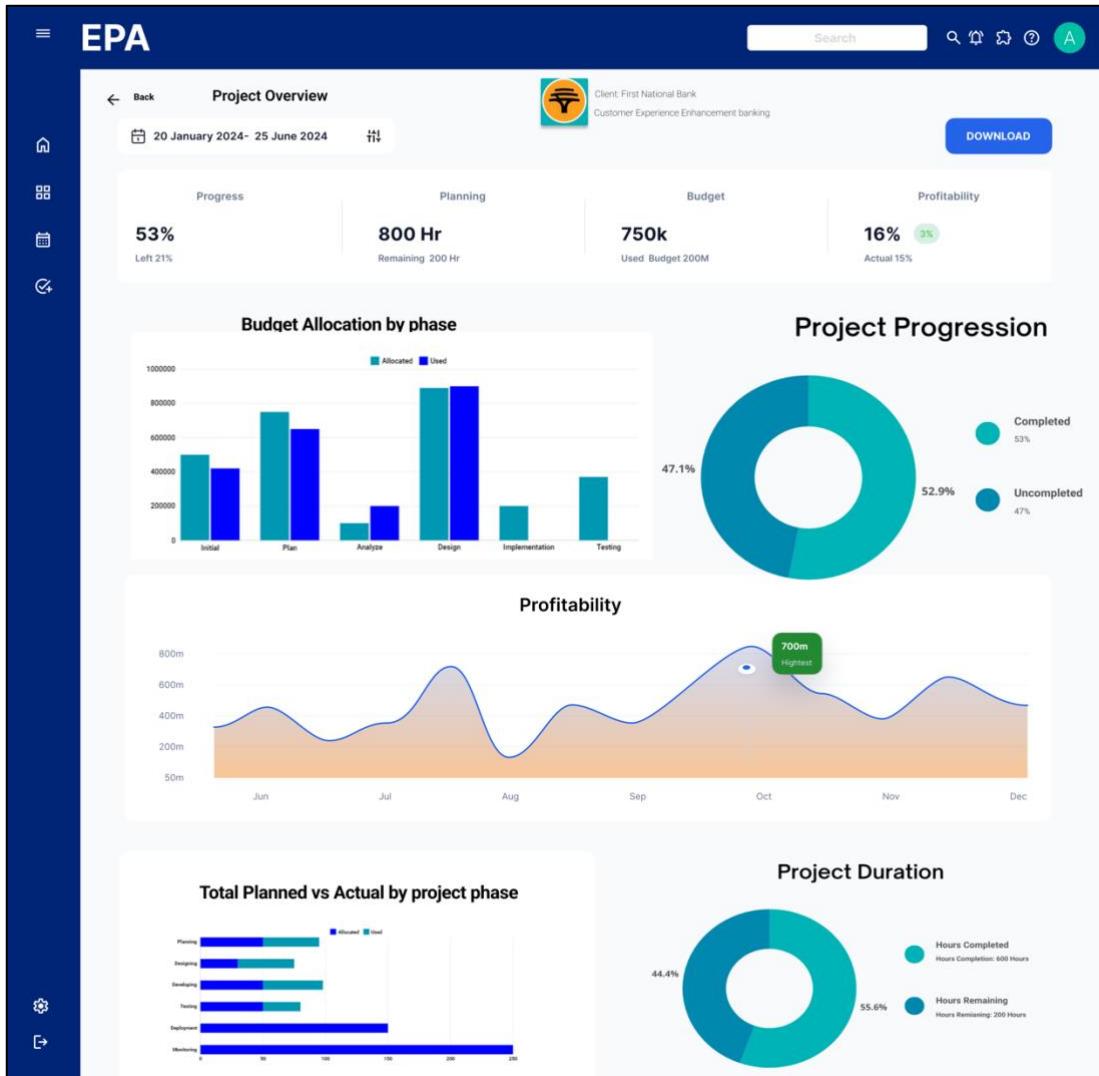
	Home button
	Dashboard button
	Calendar-Scheduler button
	Task button

[High-fidelity: Management Team, Overview of All Projects]
 [Desktop]



When users select the "overview" option, they encounter multiple charts designed to assist management. The profitability graph visualizes project performance in terms of profitability and it takes centre stage as the largest graph on the screen. Given the company's primary interest in profitability indicators, this graph holds more prominence. Other graphs which ranked lower in the information hierarchy, occupy less screen space. The budget allocation chart illustrates how much of the allocated budget is currently utilized by the projects. Additionally, the project profitability overview provides a concise summary: it highlights the number of projects incurring losses, those performing at an average level, and those generating profits. The purpose of this dashboard overview page is to enable managers to swiftly assess project performance and take necessary actions.

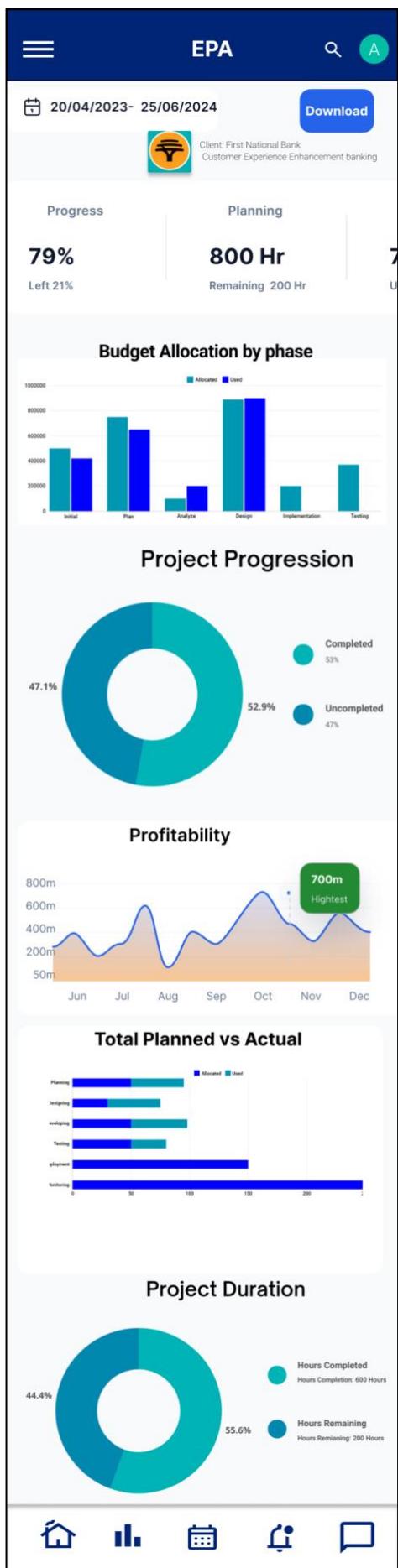
[High-Fidelity, Management Team Landing Page, Project Selection]
 [Desktop]



Detailed Project overview (Desktop)

When a user has clicked on the specific project on the dashboard, the user will be directed to this project overview page where we illustrate the four key indicators of the specific project which is FNB project, namely, progress, planning, budget, and profitability. We decided to include a download button where a user can download pdf format for the project overview. We used graphs to illustrate how the progress is going, the duration of the project, how the budget was used and the profitability of the project, there is also a duration of the project where a user can filter and see other months of the project.

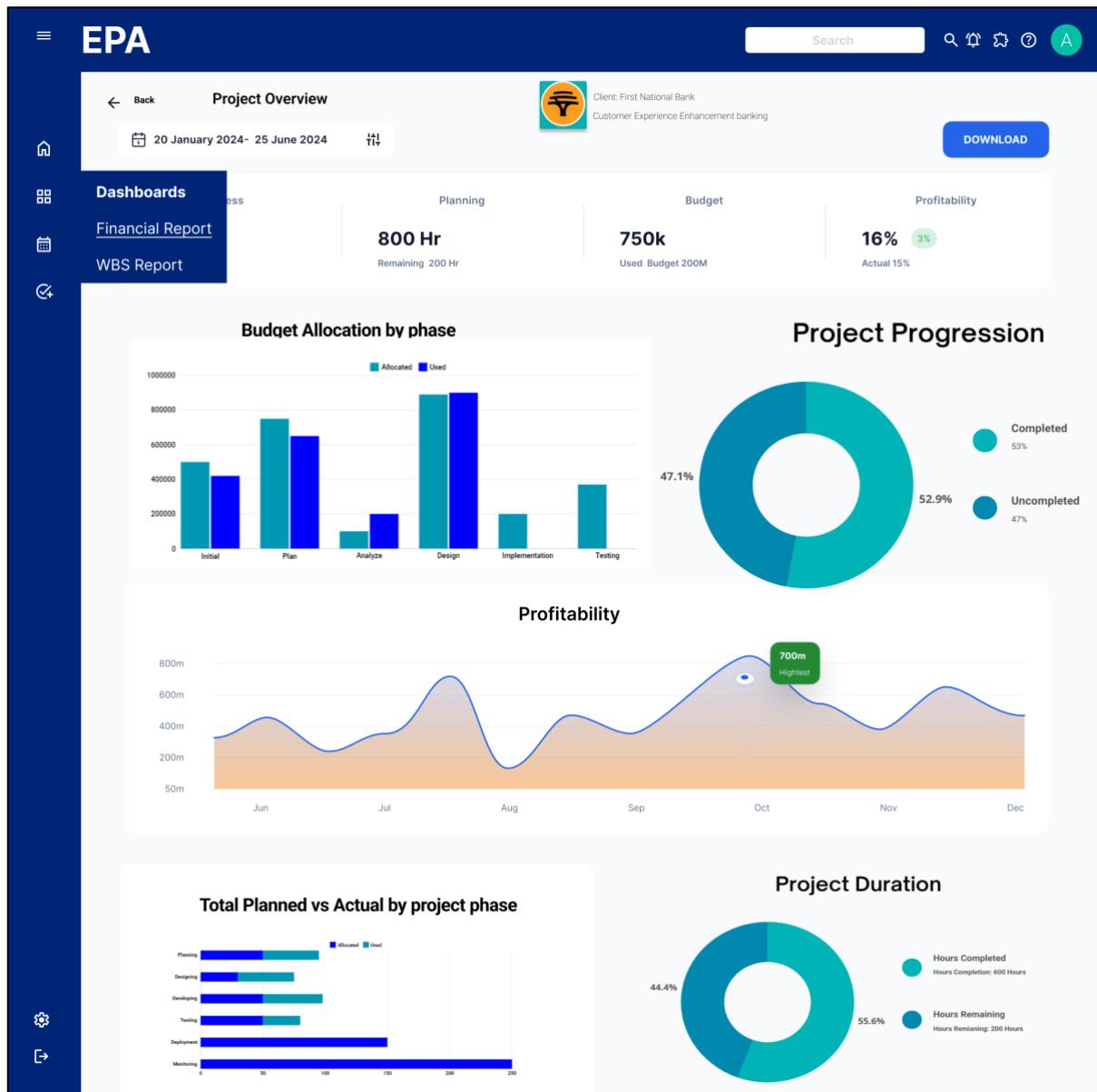
[Mobile]



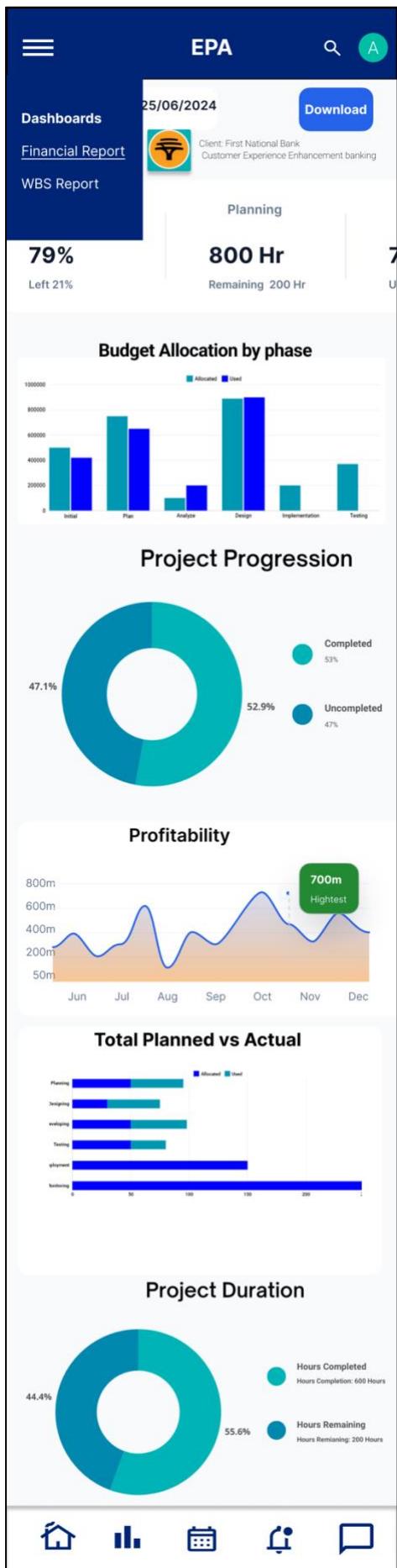
Detailed Project overview (Mobile)

In mobile version, there is a hamburger menu where a user click to view more dashboards , in this a user can swipe right to see the four key indicators just to give a clear indication of what the dashboard will be about, the user can also swipe up to see the detailed four key indicators graphs which have important information of how the progress is going, the duration of the project, how the budged was used and the profitability of the project, the mobile version also have the download button where a user can download pdf format for the project overview. The mobile version has the navigation bar below where a user can click home, or view calendar, the user can also view messages.

[High-Fidelity, Management Team Project Overview Page, Dashboard Selection]
[Desktop]



[Mobile]



[High-Fidelity, Management team: Financial Report Dashboard]
[Desktop]

EPA

Client: First National Bank
Customer Experience Enhancement banking

Financial Report Dashboard Client: FNB Project Status: Open Time Period: 12 Month Interval

Financial Performance Report

Profit Margin Analysis

Monthly revenue figures for the past year

Highest Revenue Trend Over Time
65,000 August 2024

Gross profit margin and net profit margin for the latest quarter

65% Gross Profit Margin
35% Net Profit Margin

Cash Flow Analysis

Expenses Breakdown by Category

Salaries	40%
Utilities	15%
Expenses	20%
Other	10%

Debt-to-Equity Ratio Trend

Quartile 1	0.8
Quartile 2	0.7
Quartile 3	0.6
Quartile 4	0.5

Invoices Overview

Values in Rand (R10 000)

Category	Amount
Total Income	140,000
Total Cost of Sales	15,900
Gross Profit	124,800
Total Expenses	35,690
Net Earnings	89,110

List of Invoices

Doc No.	Vendor/Supplier	Date received	Due Date	Payment Date	Status	Payment	Project Code	Approved By
123	XYZ Enterprise	Dec 13, 2023	Dec 28, 2023	2023-06-30 2:54:05	Pending	10,600	PRJ001	John Smith
125	Global Solutions Inc.	Nov 20, 2023	Dec 5, 2023	2023-06-30 2:54:05	Processing	10,600	PRJ001	John Smith
121	Premier Products LLC	Jun 13, 2023	Jun 28, 2023	2023-06-30 2:54:05	Processing	10,600	PRJ001	Emily Johnson
225	Swift Logistics	Jul 15, 2023	Jul 30, 2023	2023-06-30 2:54:05	Scheduled	10,600	PRJ001	John Smith
015	Elite Technologies	Feb 16, 2023	Mar 3, 2023	2023-06-30 3:28:48	Paid	10,000	PRJ001	Sarah Davis
101	United Solutions	Dec 25, 2023	Jan 9, 2024	2023-06-30 3:28:48	Overdue	10,000	PRJ001	Kevin Thompson
100	XYZ Enterprise	Apr 26, 2023	May 11, 2023	2023-06-30 3:28:48	Pending	10,000	PRJ001	Sibusiso Radebe
102	United Solutions	Jan 15, 2024	Jan 30, 2024	2023-06-30 3:28:48	Processing	10,000	PRJ001	Jonty Smith
105	Global Solutions Inc.	Nov 3, 2023	Nov 18, 2023	2023-06-30 3:28:48	Paid	8,440	PRJ001	Jonty Smith
108	Dynamic Industries	Dec 10, 2023	Dec 25, 2023	2023-06-30 3:28:48	Paid	8,440	PRJ001	Jonty Smith
1079	Quantum Services	Nov 11, 2023	Nov 26, 2023	2023-06-30 3:28:48	Paid	8,440	PRJ001	Emily Johnson
1059	Dynamic Industries	Feb 25, 2023	Mar 12, 2023	2023-06-30 3:28:48	Scheduled	8,440	PRJ001	John Smith
1059	Dynamic Industries	Mar 6, 2023	Mar 21, 2023	2023-06-30 3:28:48	Scheduled	8,440	PRJ001	John Smith
1025	Premier Products LLC	Apr 4, 2023	Apr 19, 2023	2023-06-30 3:28:48	Pending	8,440	PRJ001	John Smith
1025	Alpha Corporation	Dec 10, 2023	Dec 25, 2023	2023-06-30 3:28:48	Paid	8,440	PRJ001	John Smith
1079	XYZ Enterprise	Dec 21, 2023	Jan 5, 2024	2023-06-30 3:28:48	Pending	8,440	PRJ001	John Smith
1079	Swift Logistics	Apr 13, 2023	Apr 28, 2023	2023-06-30 3:28:48	Processing	8,440	PRJ001	John Smith

Grand total **557,571.8**

1 - 17 / 50

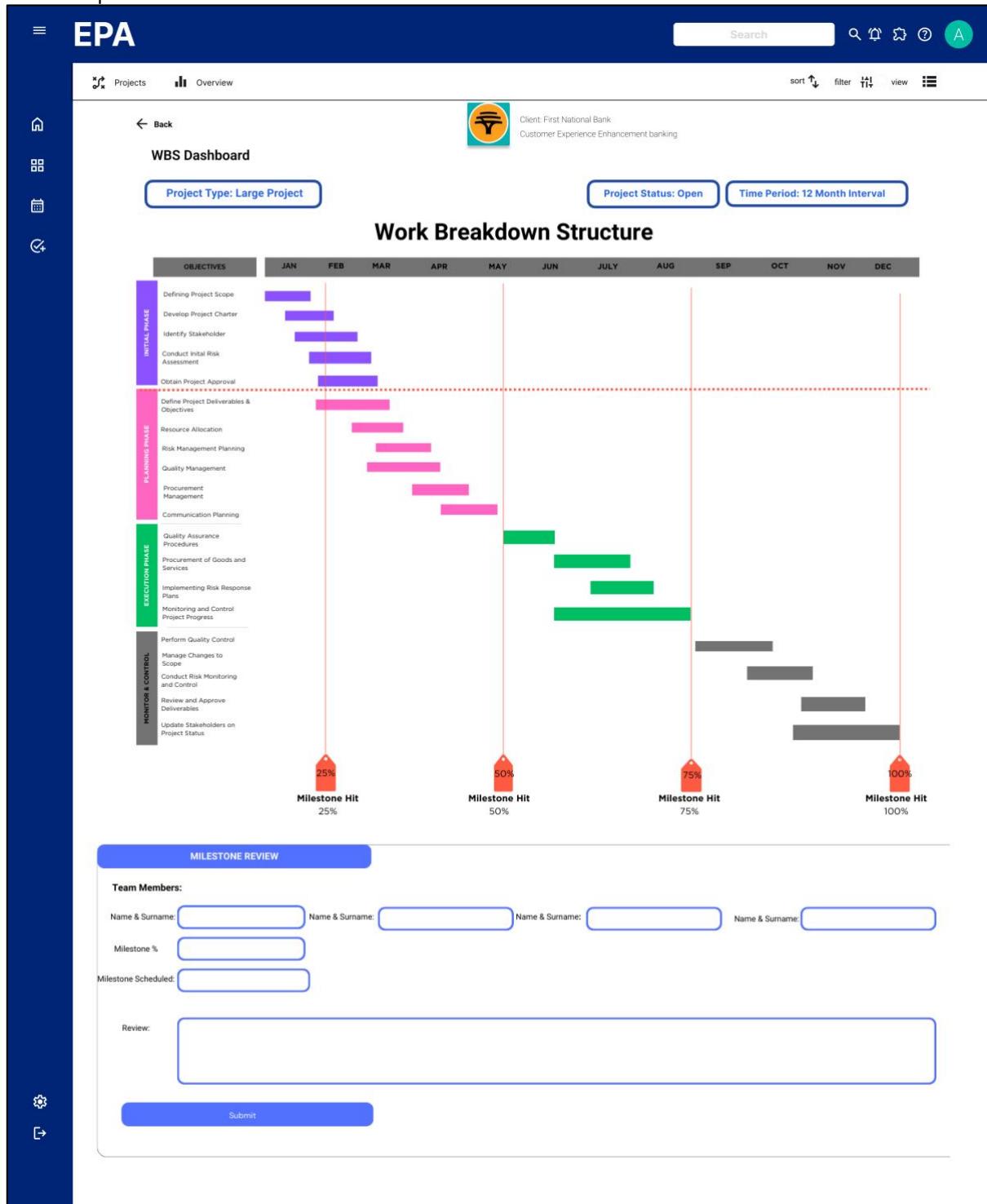
[Mobile]

The mobile application interface for the EPA (Customer Experience Enhancement banking) project. At the top, there is a blue header bar with a menu icon, the project name "EPA", a search icon, and a user profile icon. Below the header, the client information "Client: First National Bank" and "Customer Experience Enhancement banking" is displayed next to a logo. The main content area is titled "Financial Report". It includes a chart titled "Monthly revenue figures for the project" showing revenue from January to July. A section titled "Cash Flow Analysis" displays operating, investing, and financing cash flows. Another section titled "Expenses Breakdown by Category" shows percentages for Salaries, Utilities, Expenses, and Other. A "Debt-to-Equity Ratio Trend" chart compares quartiles. The bottom section, "Profit Margin Analysis", shows gross and net profit margins with a donut chart. At the very bottom, there is a navigation bar with icons for Home, Analytics, Calendar, Notifications, and Chat.

The financial report Dashboard

Once the user has clicked on the financial report dashboard dropdown option, the user will be redirected to the financial report dashboard where the user will be able to view all financial reports analysis in depts of the project overview for the entire team of the year as well as cashflow analysis and the expenses breakdown per category, date to issue trends profit analysis, and we have the list of invoices that have been processed, the will show all of the dashboards invoices that have been sent to our vendors and suppliers as well as the remaining invoices that still need to be processed and at the bottom of the page we have a list of all of the invoices, the user can click the button to download the pdf format, there a click on button by the financial performance report to expand on the graph.

[High-Fidelity, Management team: WBS Report Dashboard]
 [Desktop]



[Mobile]

≡EPAA

← Back Client: First National Bank
Customer Experience Enhancement banking

Project Type: Large ProjectProject Status: OpenTime Period: 6 Month Interval

Work Breakdown Structure

OBJECTIVES	JAN	FEB	MAR	APR	MAY	JUN
Defining Project Scope	<div style="width: 20%;"> </div>					
Develop Project Charter	<div style="width: 25%;"> </div>	<div style="width: 25%;"> </div>				
Identify Stakeholder	<div style="width: 20%;"> </div>	<div style="width: 20%;"> </div>				
Conduct Initial Risk Assessment	<div style="width: 20%;"> </div>	<div style="width: 20%;"> </div>	<div style="width: 20%;"> </div>			
Obtain Project Approval	<div style="width: 20%;"> </div>					
Define Project Deliverables & Objectives	<div style="width: 20%;"> </div>					
Resource Allocation		<div style="width: 20%;"> </div>				
Risk Management Planning		<div style="width: 20%;"> </div>				
Quality Management		<div style="width: 20%;"> </div>				
Procurement Management		<div style="width: 20%;"> </div>				
Communication Planning		<div style="width: 20%;"> </div>				
Planning Activities	<div style="width: 100%;"> </div>					
Procedures					<div style="width: 100%;"> </div>	

25%
Milestone Hit

50%
Milestone Hit

MILESTONE REVIEW

Team Members:

Name & Surname:	<input type="text"/>
Name & Surname:	<input type="text"/>
Milestone %	<input type="text"/>
Review:	<input type="text"/>

Name & Surname:	<input type="text"/>
Name & Surname:	<input type="text"/>
Milestone Scheduled:	<input type="text"/>



Work breakdown structure

When a user clicks the WBS dashboard, they will be directed to work breakdown structure dashboard which has the illustration of the specific project objectives which is broken down to view the work breakdown structure graphs, having above of the graph placeholders, the user have the project type icon, illustrating the type of the project the user is dealing with. can also illustrate if it's the large project, and there is a project status that shows its opens, or the project hasn't been finished or closed. The user has a time button to check the time period of the graph, the graph breaks the each of the key objective of the projects as well as the timeline and milestone, once the milestone has been targeted, the management team(users) will get the notification on his navigation bar, and the user will be prompted to review the milestone and be able to write down the teams leaders names, surnames, as well as the milestones that has been hit and the time it was captured . make any comments with regard to what the team members need to continue conducting going forward.

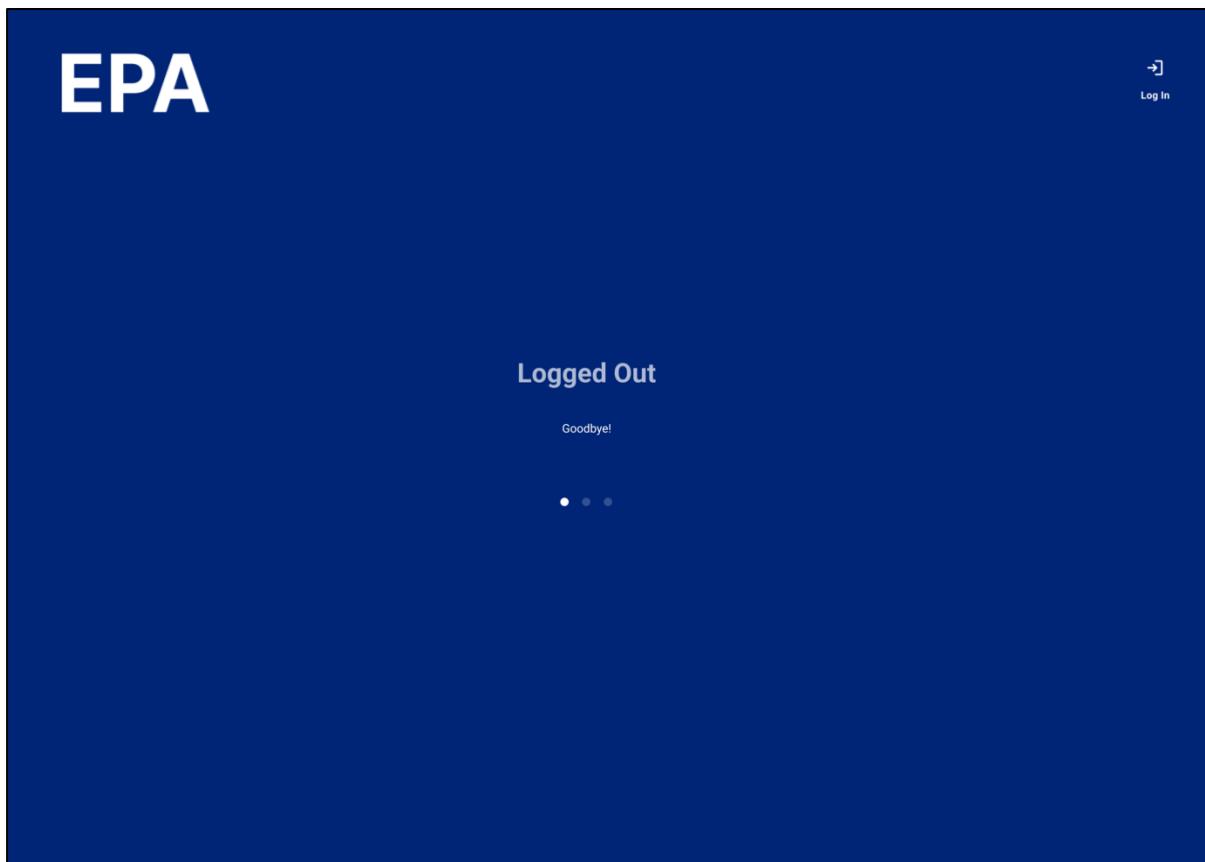
[High-Fidelity, Management team: Meeting Scheduler]
 [Desktop]

Day	Meeting	Duration	Start	End
Monday 12	Identify all stakeholders	1 Hour		
Tuesday 13	Team Meeting @08:00	1 Hour		
Tuesday 13	Define project scope	2.5 Hours		
Tuesday 13	Prioritise and set goals	3 Hours		
Tuesday 13	Define project tasks	2 Hours		
Tuesday 13	Estimate tasks duration, cost, and resources	2 Hours		
Tuesday 13	Define roles, responsibilities	2 Hours		
Wednesday 14	Team Meeting @08:00	1 Hour		
Wednesday 14	Assessing the risks	2 Hours		
Wednesday 14	Project Design	2 Hours		
Wednesday 14	Development of the project	4 Hours		
Thursday 15				
Friday 16				

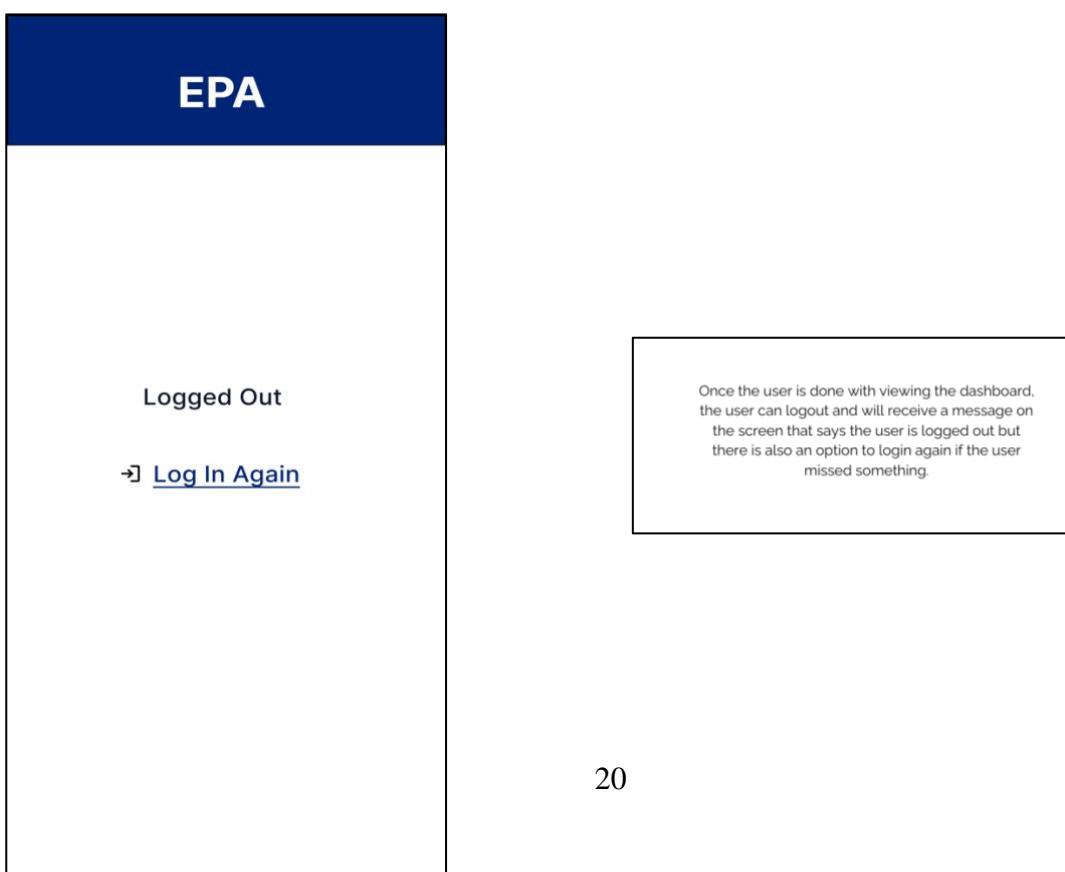
Project meeting scheduler dashboard (Desktop)

When a user has clicked on the calendar, will be able to schedule the meeting for that project, can be filtered to day or week, and the current date will be shown, there is also a button where a user can click to add the meeting, once the meeting has been scheduled, it will appear on the calendar and the time of the meeting will be highlighted in colors just to make the user is aware about the meeting, these colors play important role as red will indicate that meeting is the most important one. There is also a duration of that meeting that will be shown in colours. The user has an option to start or end that meeting.

[High-Fidelity, Management team: Logged Out]
[Desktop]



[Mobile]



[High-fidelity Wireframes – Log In – Project Lead]
 [Desktop]

[Mobile]

Login (Project Lead mobile)
 Similar to the project manager workflow login page, the project lead login page initiates the identification process of the project lead of the consulting firm's projects. The project lead is required to enter their registered email address, followed by their personal password. The project lead in the example above logs onto the platform, starting the project lead workflow. This login process also has the option to check the 'remember me' checkbox to keep the personal information saved on the platform and avoid re-entering the personal information upon logging in on different occasions. After entering the project lead details, the project lead can then click the 'sign in' button to gain access to the platform.

Login (Project Lead Desktop)
 Similar to the project manager workflow login page, the project lead login page initiates the identification process of the project lead of the consulting firm's projects. The project lead is required to enter their registered email address, followed by their personal password. The project lead in the example above logs onto the platform, starting the project lead workflow. This login process also has the option to check the 'remember me' checkbox to keep the personal information saved on the platform and avoid re-entering the personal information upon logging in on different occasions. After entering the project lead details, the project lead can then click the 'sign in' button to gain access to the platform.

[High-fidelity Wireframes – , Project Lead Landing Page]
[Desktop]

Project Category	Client Logo	Project Name	Profitability (%)	Budget (M)	Planned Hours (%)	Progress (%)
Financial		Customer Experience Enhancement	9%	2.5M	89%	<div style="width: 75%;">75%</div>
		Credit Risk Assessment	21%	750K	92%	<div style="width: 53%;">53%</div>
		Customer Experience Enhancement	20%	750K	90%	<div style="width: 73%;">73%</div>
		Mergers and Acquisitions	16%	750K	72%	<div style="width: 90%;">90%</div>
Banking		Digital Transformation	16%	750K	92%	<div style="width: 50%;">50%</div>
		Credit Risk Assessment	-4%	750K	92%	<div style="width: 80%;">80%</div>
		Credit Risk Assessment	17%	750K	94%	<div style="width: 75%;">75%</div>
		Digital Transformation	14%	750K	93%	<div style="width: 80%;">80%</div>

[Mobile]

Project Category	Client Logo	Project Name	Profitability (%)	Budget (M)	Planned Hours (%)	Progress (%)
Financial		Customer Experience Enhancement	9%	2.5M	89%	<div style="width: 75%;">75%</div>
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		Credit Risk Assessment	17%	750K	94%	<div style="width: 75%;">75%</div>
		Digital Transformation	14%	750K	93%	<div style="width: 80%;">80%</div>

When the project leads into the screen, they will be directed to a project dashboard overview screen that is similar to the screen that managers see when they log in. This is to maintain consistency. The project lead will only see the projects they supervise but the option to view all the projects is also available on the navigation bar. The dashboard follows a similar format to the management dashboard as they have access to the same functionalities. All the projects grouped by different clients and again the logo is used for the project leads to easily identify the clients. The project lead also has the option for list or card view depending on their preferences . The project lead can assess the profitability of his projects before moving on to other options

[High-Fidelity, Project Lead Landing Page]
[Desktop]

EPA

Search J

Projects Overview sort filter view

Highlighted Projects All Projects (37)

Home grid calendar refresh

More

Customer Experience Enhancement <small>Banking</small>	Risk Management and Compliance <small>Retail</small>	Data Analytics and BI <small>Chemical and Energy</small>
Profitability 16% Budget 750K Planned Hours 92% <div style="width: 53%;">53%</div>	Profitability 20% Budget 1.2M Planned Hours 56% <div style="width: 60%;">60%</div>	Profitability -2% Budget 2.3M Planned Hours 53% <div style="width: 50%;">50%</div>
Customer Experience Enhancement <small>Financial</small>	Credit Risk Assessment <small>Chemical and Energy</small>	Customer Experience Enhancement <small>Banking</small>
Profitability 9% Budget 2.5M Planned Hours 89% <div style="width: 75%;">75%</div>	Profitability 21% Budget 750K Planned Hours 92% <div style="width: 53%;">53%</div>	Profitability 20% Budget 750K Planned Hours 90% <div style="width: 73%;">73%</div>
Digital Transformation <small>Banking</small>	Credit Risk Assessment <small>Banking</small>	Credit Risk Assessment <small>Banking</small>
Profitability 16% Budget 750K Planned Hours 92% <div style="width: 50%;">50%</div>	Profitability -4% Budget 750K Planned Hours 92% <div style="width: 80%;">80%</div>	Profitability 17% Budget 750K Planned Hours 94% <div style="width: 75%;">75%</div>
Cybersecurity and IT Risk <small>Chemical and Energy</small>	Mergers and Acquisitions <small>Telecommunications</small>	Digital Transformation <small>Telocommunication</small>
Profitability 18% Budget 890k Planned Hours 98% <div style="width: 89%;">89%</div>	Profitability 16% Budget 750K Planned Hours 72% <div style="width: 90%;">90%</div>	Profitability 14% Budget 750K Planned Hours 93% <div style="width: 80%;">80%</div>

[High-Fidelity, Project Lead Profile View] [Desktop]

The dashboard features a dark blue header with the acronym 'EPA' and a navigation bar on the left containing icons for Home, Projects, Overview, and Settings. On the right, there's a purple circular profile picture of 'Jack Wilshere, Project Lead'. Below the profile are sections for 'Messages' (with notifications from Matthieu Mossels and Simphiwe Tshabalala), 'Flagged Projects' (Credit Risk Assessment, Cybersecurity and IT Risk, Customer Experience Enhancement), and 'Meetings' (Board Meeting and Organisational Meeting on March 27). Key performance indicators at the top include 'Total Project: 27' (Completed: 14, Incomplete: 13), 'Milestones: 10' (Milestone Hit: January), and 'Total Hours: 120' (Hours worked: January). A central chart titled 'Statistics of Overall Projects' shows the distribution of small, medium, and large projects monthly.

[Mobile]

The mobile version of the dashboard has a similar layout to the desktop one. It includes the 'EPA' logo, a navigation bar with icons for Home, Projects, Overview, and Settings, and a purple circular profile picture of 'Jack Wilshere'. The key performance indicators and flagged projects section are identical to the desktop version. The 'Statistics of Overall Projects' chart is also present. At the bottom, there's a large callout box for 'Needs Review' with the number '10' and a 'Meetings' section listing the same two meetings as the desktop version.

Project lead Profile dashboard

Once the user which is project lead clicks on the profile icon on the right hand corner by the navigation bar, they will be prompted to this page. This page is a illustration all of the key performance indicators as well as statistics for the project that the project lead is supervising. This page has three APJs at the top to show the various project that the project lead is supervising as well as the milestone has been hit for that specific month, the total hours spent for each project, then we have the statistics for the project for small to large projects and the bottom there is a illustration of which project need to be reviewed, if you look at the side of the banner, there is a illustration of the messages that the project lead has from either different teams or any member of the project as well as flag projects with the logo of the company and the project name to illustrate who is the client, and the reason why its flagged because the milestone has been hit, profitability has dropped, the ability to click and review to expand the projects issues.

[High-Fidelity, Project Lead: Project View, Dashboard Selection]
[Desktop]

EPA

Projects Overview

Total Project: 7 (complete: 13)

Milestones: 10 (Milestone Hit: January)

Total Hours: 120 (Hours worked: January)

Statistics of Overall Projects

Small Projects: Medium Projects: Large Projects:

Month	Small Projects	Medium Projects	Large Projects
Jan	2	3	5
Feb	4	5	6
March	6	7	7
April	8	7	7
May	12	8	8
June	12	8	8
July	11	8	8
August	11	8	8
September	12	8	8
October	12	8	8
November	13	7	7
December	10	7	7

Needs Review: 10

Projects that need to be reviewed.

Meetings

- Board Meeting: 10:00 - 12:00, 27 March 2024
- Organisational Meeting: 10:00 - 12:00, 27 March 2024

Messages

- M** Matthieu Mossels: Please review the Financial report, we ...
- S** Simphiwe Tshabalala: Jack, please sign-off on the suppliers...

Flagged Projects

- Credit Risk Assessment**: Project: Credit Risk Assessment, Milestone: Passed 50%, Review
- Cybersecurity and IT Risk**: Project: Cybersecurity and IT Risk, Planned Hours less than 90%, Review
- Customer Experience Enhancement**: Project: Customer Experience Enhancement, Profitability dropped below 15%, Review

[Mobile]

EPA

Overview

Milestones: 10 (Milestone Hit: January)

Total Hours: 120 (Hours worked: January)

Statistics of Overall Projects

Small Projects: Medium Projects: Large Projects:

Month	Small Projects	Medium Projects	Large Projects
Jan	2	3	5
Feb	4	5	6
March	6	7	7
April	8	7	7
May	12	8	8
June	12	8	8
July	11	8	8
August	11	8	8
September	12	8	8
October	12	8	8
November	13	7	7
December	10	7	7

Needs Review: 10

Projects that need to be reviewed.

Meetings

- Board Meeting: 10:00 - 12:00, 27 March 2024
- Organisational Meeting: 10:00 - 12:00, 27 March 2024

Dashboard Selection

Home Overview Dashboards Financial Report WBS Report Task Manager Team Management

[High-Fidelity, Project Lead: Team Management Dashboard]
 [Desktop]

The screenshot displays the Team Management Dashboard for the Customer Experience Enhancement banking project. The top navigation bar includes a search bar and user profile icons. The dashboard features six individual profiles arranged in a 2x3 grid:

- Jack Willshore (Project Lead):** Purple circular icon with 'J'. Details: Financial Analyst (2 years), Sales (6 years).
- Greg Smith (Member):** Blue circular icon with 'G'. Expertise: Financial Planner (2 years), Digital Marketing (4 years). Project Hours: Spent 130 hours, planned 170 hours, 76.47% used.
- Connor Wall (Member):** Blue circular icon with 'C'. Expertise: Business Analyst (3 years), System Engineer (4 years). Project Hours: Spent 110 hours, planned 150 hours, 73.33% used.
- Daniel Willis (Member):** Orange circular icon with 'D'. Expertise: Software Engineer (8 years). Project Hours: Spent 93 hours, planned 153 hours, 60.78% used.
- Allison Wilky (Member):** Teal circular icon with 'A'. Expertise: Software Engineer (6 years). Project Hours: Spent 143 hours, planned 185 hours, 77.30% used.
- Gift Nkosi (Member):** Blue circular icon with 'G'. Expertise: Software Engineer (6 years). Project Hours: Spent 124 hours, planned 142 hours, 87.32% used.

Below the profiles are two charts:

- Project Duration:** A donut chart showing the distribution of work. Legend: Hours Completed (44.4%, teal), Hours Remaining (55.6%, blue).
- Total Planned vs Actual by project phase:** A horizontal bar chart comparing allocated vs. used hours across five phases: Planning, Designing, Developing, Testing, Deployment, Monitoring.

[Mobile]

The screenshot shows a mobile application interface for a 'Team Management Dashboard'. At the top, there's a header bar with a menu icon, the text 'EPA', a search icon, and a user profile icon. Below the header, the text 'Client: First National Bank' and 'Customer Experience Enhancement banking' is displayed. The main content area is titled 'Team Management Dashboard' and features three distinct profile cards, each with a large letter icon (J, G, C) and the member's name and title.

- Jack Willshore** (Project Lead):
Project Manager: 4 years Experience
Financial Analyst: 2 Years Experience
Sales: 2 Years Experience
- Greg Smith** (Member):
Financial Planner: 2 Years Experience
Digital Marketing: 4 Years Experience
- Connor Wall** (Member):
Business Analyst: 3 Years Experience
System Engineer: 4 Years Experience

Each profile card includes sections for 'Expertise' and 'Project Hours' with specific data points like hours spent, planned, and used.

At the bottom of the screen are navigation icons for Home, Reports, Calendar, Notifications, and Chat.

J

Team management dashboard (desktop)

The dashboard displays different project team member profile cards, of the specific project of interest, entailing their different qualifications and characteristics, including employee expertise, the total hours spent on the project, hours planned to be spent and the percentage of planned hours used by each team member. The percentage of the planned hours use is calculated through, hours spent relative to the total hours planned for the project by each team member. The profile dashboard includes a display of the project lead's profile, which is identifiable through its highlight effect, to differentiate the profile card from the rest of the team members. The project lead's project hours are not necessary to be displayed as they oversee all the team members and could contribute to the relative hours spent by each team member respectively. The information displayed in the profile cards is elaborated further at the bottom of the dashboard page graphically. The first graph, a doughnut graph, represents the total project duration, including the project hours completed and the hours remaining. This is all represented by different colours and percentage indications in the graph. The second graph represents the total planned hours in comparison to the actual hours spent by project phase, there are six phases represented in the graph.

Team management dashboard (mobile)

The dashboard displays different project team member profile cards, of the specific project of interest, entailing their different qualifications and characteristics, including employee expertise, the total hours spent on the project, hours planned to be spent and the percentage of planned hours used by each team member. Just like the desktop but are represented vertically on the mobile and the user can scroll down the screen to see more team members and click on the 'view all button' to view all the project team members. Below that the project graphs entailing the same information as the desktop graphs is represented at the bottom of the screen and the different graphs can be scrolled through horizontally on the screen and they all appear one graph at a time, unlike the desktop view appearing at once.

[High-Fidelity, Project Lead: Task Management Dashboard]
 [Desktop]

The screenshot shows the Task Management Dashboard for the Project Lead, Jack Willshire. The top navigation bar includes a search bar, filter, view, and a profile icon. The main header is "Task Management Dashboard" with a sub-header "FNB Customer Experience Enhancement Project Lead". On the left, there's a sidebar with icons for Home, Projects, Overview, and other navigation links.

Status of Tasks: Overall Tasks Status: 56% completion. Includes a list of tasks: Responsive Time Improvement, Interaction Personalization, Customer Journey Streamlining, and Monitor & Measure Experiences, each with a "View" button.

Current Project: Project Name: FNB Customer Experience Enhancement Project Lead. Project Manager: Andy May. Project Lead: Jack Willshire. Team: 6 members + 4 more. Timeline: A horizontal bar chart showing task progress over months (0 to 32).

Schedule: Shows a calendar for May 2024 with days 21 to 25 highlighted. A "Search" bar is also present.

To Do List: A table showing tasks assigned to team members: G (Strategy formulation), D (System Audit), J (Gather user feedback), and C (Measure ROI) with their respective due dates.

Team Task Overview: A table showing tasks assigned to team members: G (Responsive Time Improvement), D (Interaction Personalization), C (Customer Journey Streamlining), and J (Monitor & Measure Experiences).

Meetings, Events, and Holiday: A section listing meetings for the FNB CEO and team (09:00-12:00, Room 439 Board Room, 4 Consulting Team Members), Internal Finance Team (14:00-15:00, Finance Board Room, Team Lead and Finance team), and a Weekly Analysis Meet (16:30-17:00, Team lead office (office 5), FNB customer experience enhancement project team).

Task Management Dashboard (desktop)

The page contains all project task information, starting with the status of the tasks completed and in need of completion of the project. The task completion percentage is represented graphically in the status of tasks card, with a list of different tasks of the project listed in the card. To view all the tasks and enlarge the graph, the project lead can click the 'see all' button on the top right hand side of the card to view more information about the card and the card will enlarge and fill up the screen and view all the tasks and graphs clearly on the screen. The rest of the cards available for viewing include the 'current project card', entailing all relevant information concerning the project (the project name, the project manager and project lead, the different team members, and the project time line, represented graphically). All cards have the 'see all' button to enlarge the information of the card and view more information on the whole desktop. The 'to do list', which is a list of all the tasks which still need to be completed, and lastly we have the 'team task overview card', listing all the team members responsible for the respective tasks of the project. On the right we have the calendar of the project lead and the meetings related to the project.

Task Management Dashboard (mobile)

The page contains all project task information, similar to the desktop. The calendar of the project lead and the meetings related to the project appear first on mobile and have a horizontal scrolling feature to view all information and scroll through the different information presented.

[Mobile]

The mobile interface displays the Project Task Management Dashboard. At the top, it shows a navigation bar with a menu icon, the title 'EPA', a search icon, and a user profile icon. Below the title, it indicates the client is 'First National Bank' and the project is 'Customer Experience Enhancement banking'. The dashboard includes:

- Project Task Management Dashboard:** Shows a 'Schedule' section with a calendar for May 2024, a search bar, and a 'Status of Tasks' section with a progress bar at 56%.
- Current Project:** Displays the project name 'FNB Customer Experience Enhancement Project Lead', project manager 'Andy May', and project lead 'Jack Willshire'. It also shows a 'Timeline' chart for tasks like 'Responsive Time Improvement' and 'Interaction Personalisation' over 12 months.
- To Do List:** A table listing tasks assigned to team members (G, D, J, C) with their due dates.
- Team Task Overview:** A table mapping specific tasks to team members.

Task Management Calendar Dashboard (Desktop)

The page opens after clicking the 'see all' button on the team management dashboard calendar and showcases the different project activities on different days and tasks which need to be completed. The calendar can be filtered based on the task due dates and the project lead can add more tasks to the calendar as well for different team members.

[Mobile]

The page opens after clicking the 'see all' button on the team management dashboard calendar and showcases the different project activities on different days and tasks which need to be completed. The calendar can be filtered based on the task due dates and the project lead can add more tasks to the calendar as well for different team members.

[High-Fidelity, Project Lead: Task Management Dashboard: Expanded Schedule]
 [Desktop]

The screenshot shows a project management dashboard for 'FNB Customer Experience Enhancement Project Lead' managed by 'Jack Willshire'. The interface includes a sidebar with navigation icons and a header with a search bar and user profile.

Schedule:

- Display:** Horizontal
- Filter:** No Due Date, Past Due Date
- Date:** May, 2024
- Create:** + Create

Members	Greg Smith	Jack Wilshire	Daniel Jones
Monday May 23	FNB CEO and Team Time: 09:00-12:00 Venue: Room 439 Board Room 4 Consulting team members	Internal Finance Team Time: 14:00-15:00 Venue: Finance Board Room Team Lead and Finance team	<input type="checkbox"/> Email Junior Consultants
Tuesday May 24	<input type="checkbox"/> Consult Affiliation firm		
Wednesday May 25			New consultant interview Time: 14:30-16:00 Venue: New Marketing Lab Team Manager
Thursday May 26		Weekly Analysis Meet Time: 16:30-17:00 Venue: Team lead office (office 5) FNB Customer Experience Enhancement project team	<input type="checkbox"/> Meeting with junior consultants

[Mobile]

The screenshot shows the 'Project Task Management Dashboard' for 'Jack Willshire' (FNB Customer Experience Enhancement Project Lead). The interface includes a top navigation bar with a menu icon, search, and profile (J). Below is a header with signal strength and battery icons. The main area displays a 'Schedule' grid for May 2024.

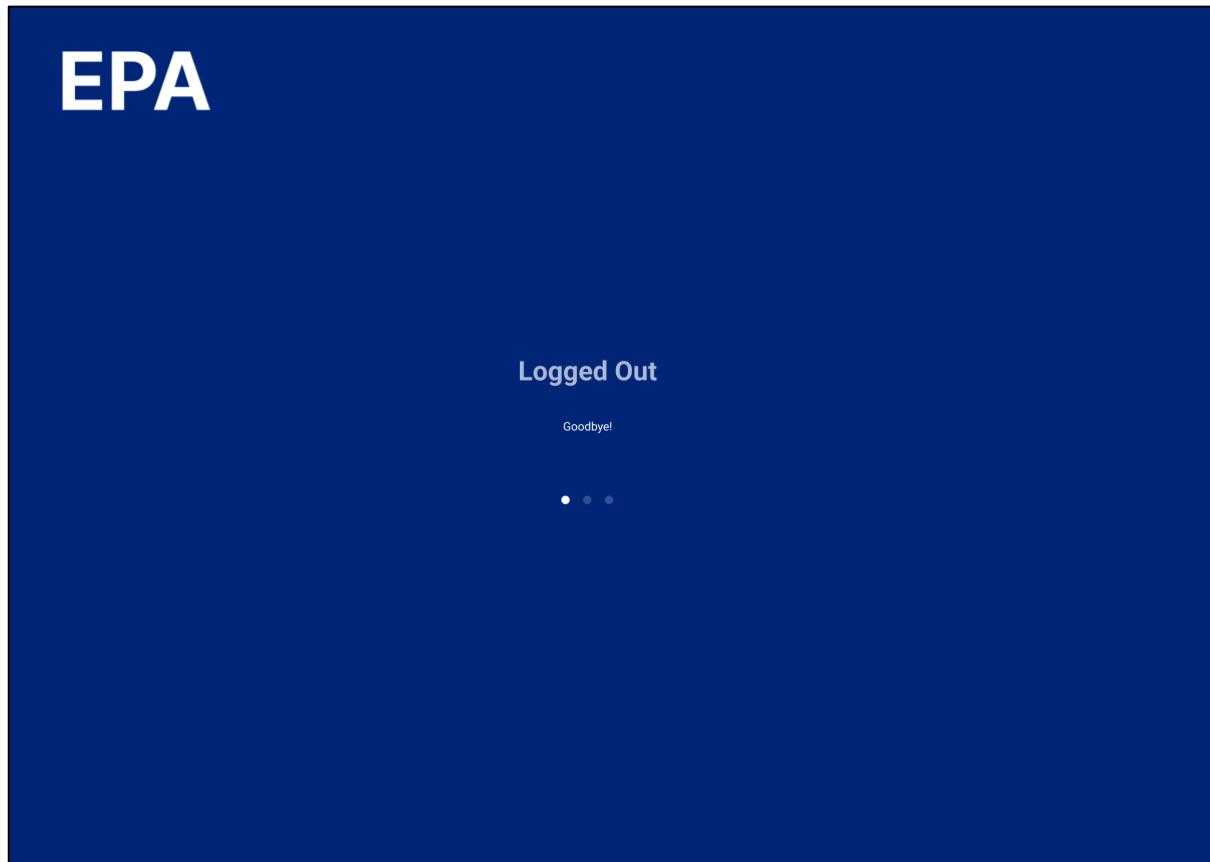
Schedule Grid:

Team Members	Greg Smith	Jack Willshire	Daniel Jones
Monday May 23	FNB CEO and Team Time: 09:00-12:00 Venue: Room 439 Board Room 4 Consulting team members	Int. Finance Team Time: 14:00-15:00 Venue: Finance Board Room Team Lead and Finance team	<input type="checkbox"/> Email Junior Consultants
Tuesday May 24	<input type="checkbox"/> Consult Affiliation firm		
Wednesday May 25		Consultant interview Time: 14:30-16:00 Venue: New Marketing Lab Team Manager	
Thursday May 26	Weekly Analysis Meet Time: 16:30-17:00 Venue: Team lead office (office 5) FNB Customer Experience Enhancement project team	<input type="checkbox"/> Meeting with junior consultants	

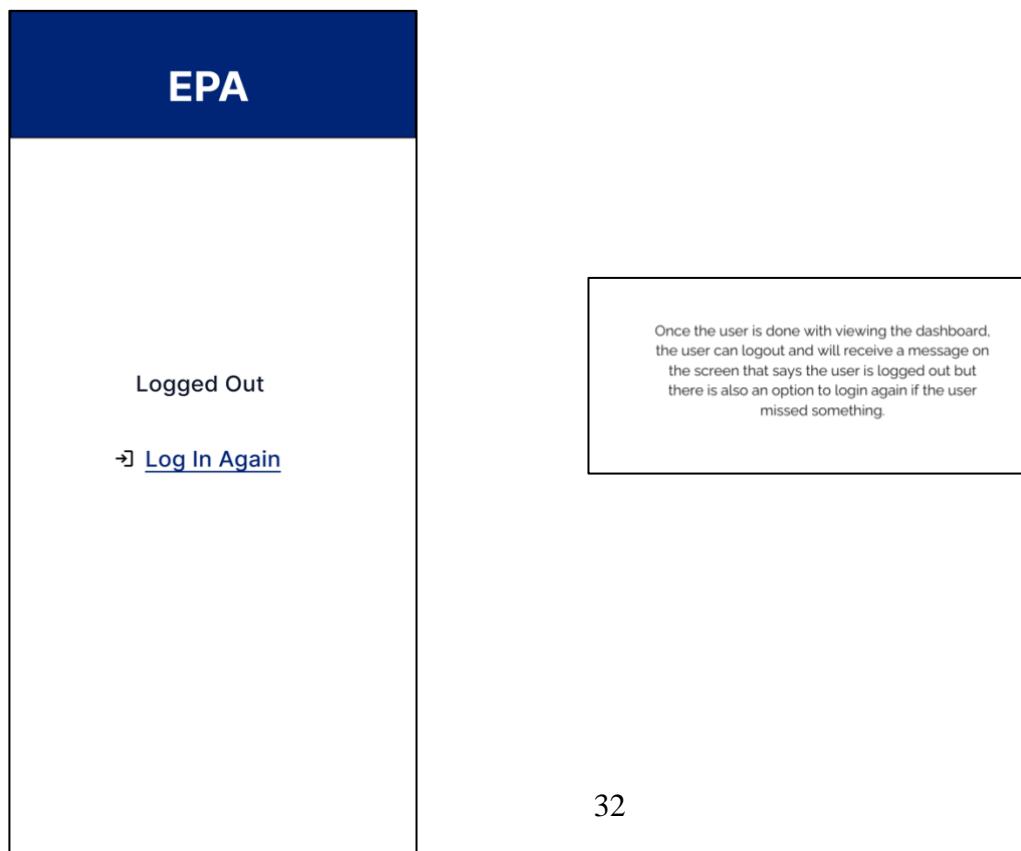
Bottom Navigation:

- Home
- Dashboard (selected)
- Calendar
- Notifications
- Messages

[High-Fidelity, Project Lead: Logged Out]
[Desktop]



[Mobile]



Day 5: Test

Feedback and Observations:

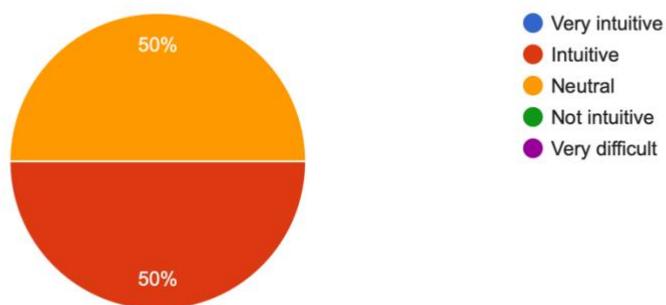
User Testing Questions:

Question 1: Ease of Use:

How intuitive was it to navigate through the dashboard?

Ease of Use: How intuitive was it to navigate through the dashboard?

4 responses



If you had issues with the dashboards, ease of use, could you elaborate more on the issues?

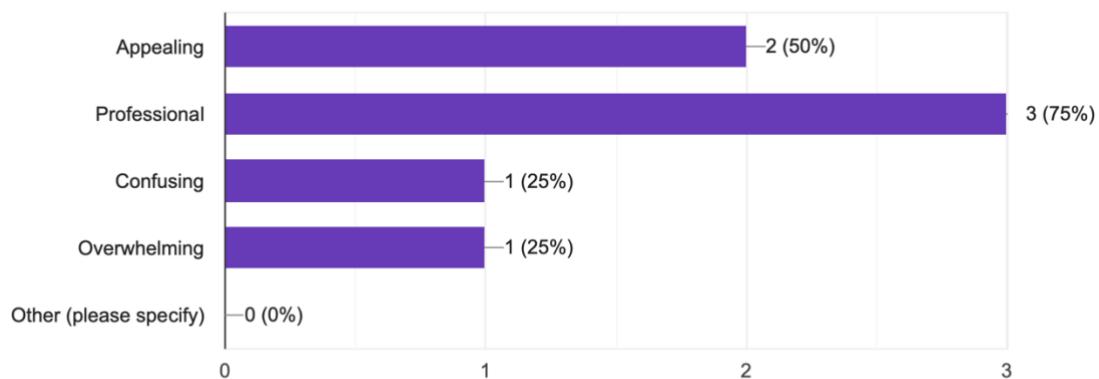
- If you had issues with the dashboards, ease of use, could you elaborate more on the issues?
- The navigation bar seemed a bit small think it will just take some time to get use to the navigation.
- The navigation would be easier to understand if there was labels or tool tips to let you know what they were.
- None

Question 2: Visual Design

What are your thoughts on the visual design of the dashboard?

Visual Design: What are your thoughts on the visual design of the dashboard?

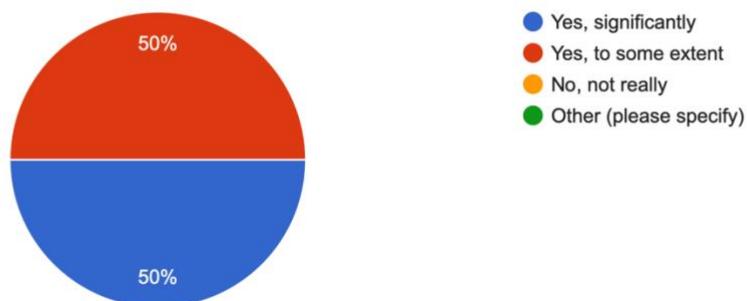
4 responses



Did the visual layout of the dashboard help you understand the data and information better?

Did the visual layout of the dashboard help you understand the data and information better?

4 responses



If you had issues with the dashboards, visual layout, could you elaborate more on the issues?

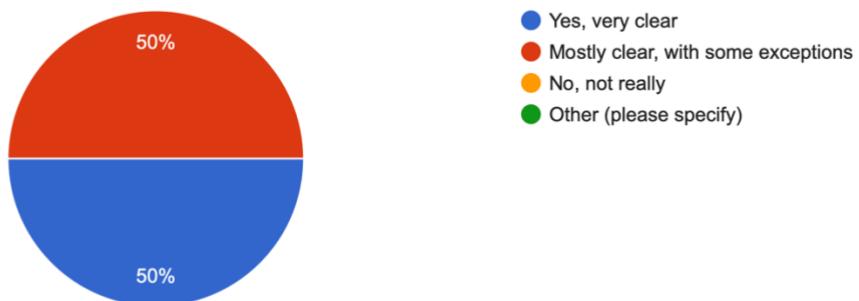
- If you had issues with the dashboards, visual layout, could you elaborate more on the issues?
- Some graphs need headings.
- very colour and content heavy
- The text on some of the visuals was a bit too small to read easily and quickly.
- None

Question 3: Clarity of Information:

Did you find the information presented on the dashboard clear and easy to understand?

Clarity of Information: Did you find the information presented on the dashboard clear and easy to understand?

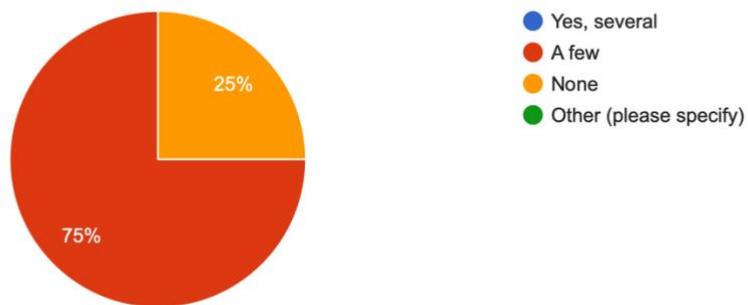
4 responses



Were there any data visualisations or metrics that were difficult to interpret?

Were there any data visualisations or metrics that were difficult to interpret?

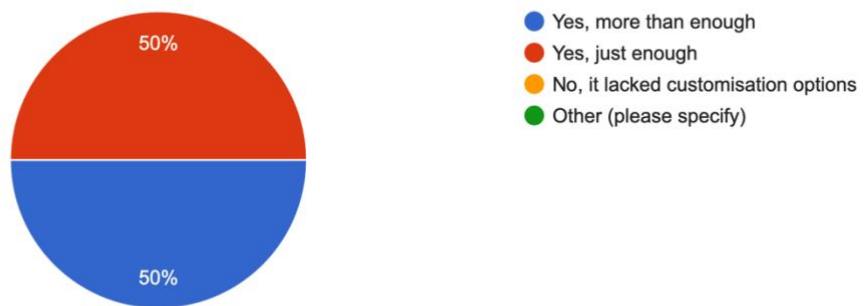
4 responses



Did you feel that the dashboard allowed enough customisation options to tailor it to user's needs?

Did you feel that the dashboard allowed enough customisation options to tailor it to users needs?

4 responses

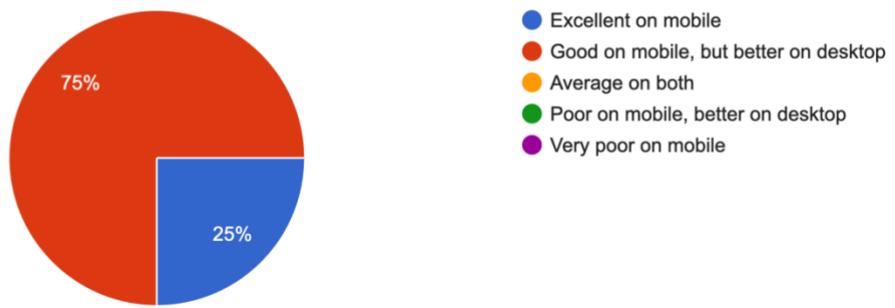


Question 4: Mobile Design:

Did you test the dashboard on mobile devices? If so, how was the experience compared to desktop?

Mobile Design: Did you test the dashboard on mobile devices? If so, how was the experience compared to desktop?

4 responses



Were there any specific challenges or issues you encountered while using the dashboard on a mobile device?

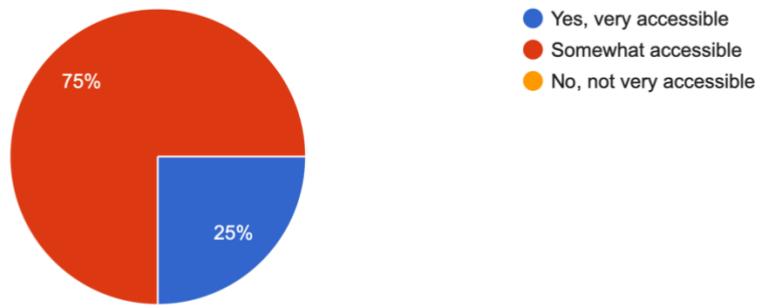
- *Scollable pages are very long.*
- *No.*
- *No, the information was condensed in a way that it didn't feel like information was being left out.*
- *A bit small.*

Question 5: Accessibility:

Did you find the dashboard accessible for users with disabilities (e.g., screen reader compatibility, colour contrast)?

Accessibility: Did you find the dashboard accessible for users with disabilities (e.g., screen reader compatibility, colour contrast)?

4 responses



Are there any accessibility features or improvements you would suggest for the dashboard?

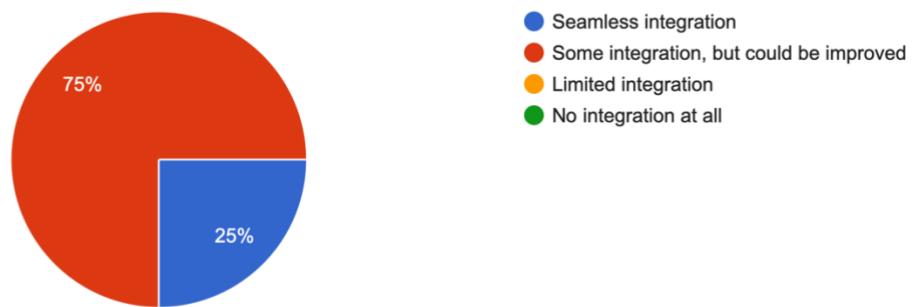
- Are there any accessibility features or improvements you would suggest for the dashboard?
- No
- Bigger text size
- The ability to increase the text size.

Question 6: Integration with Other Tools:

How well does the dashboard integrate with other tools or platforms you use for project management?

Integration with Other Tools: How well does the dashboard integrate with other tools or platforms you use for project management?

4 responses



Were there any specific integrations that we missed or did not integrate well?

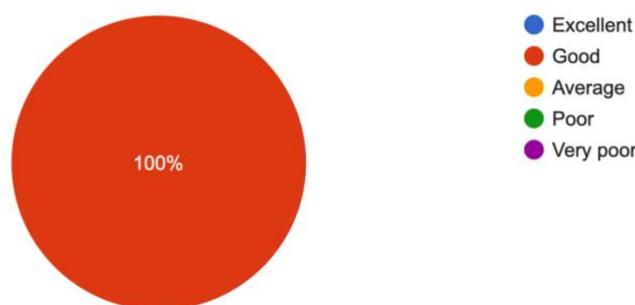
- Link to other platforms were not always clear.

Question 7: General Feedback:

How would you rate your overall experience using the new dashboard?

General Feedback: How would you rate your overall experience using the new dashboard?

4 responses



Question 8: General Feedback:

Could you provide us with reasons, why you chose the ranking above.

- Things such as some graphs missing headings and long pages made me say it's good.

Question 9: Suggestions for Improvement:

Do you have any suggestions for improving the dashboard design or functionality?

- *Maybe simply mobile or break it up to make it feel more manageable.*
- *Maybe use a smaller amount of colours.*
- *Add some labels or tool tips to make it possible to read what you're about to open.*
- *None.*

Question 10: Additional Comments:

Is there anything else you would like to share about your experience with the dashboard?

- I liked the option to change views and the detail you went into.
- I would love a help function for easier navigation.
- No additional comments.
- Nope.

Objectives:

Based on the user reviews, here are some observations regarding the tested dashboard design:

1. Ease of Use:

- Users found the **navigation bar** to be a bit small. While they acknowledge that it might take some time to get used to it, they suggest considering ways to enhance its visibility or usability.
- Adding **labels or tooltips** to the navigation elements could improve understanding and ease of use.

2. Visual Layout:

- Some users mentioned that certain **graphs lack headings**, which can make it challenging to interpret the data. Providing clear titles for visual components would enhance readability.
- The dashboard was described as **colour and content heavy**, which might overwhelm users. Simplifying the colour palette or streamlining content could improve the overall experience.
- **Text size** on visuals was occasionally too small, making it difficult to read quickly. Ensuring legibility across different screen sizes is crucial.

3. Mobile Device Challenges:

- Users noted that **scrollable pages** were quite long. While this may be unavoidable for certain content, optimizing the layout for mobile screens could enhance usability.
- Overall, the dashboard condensed information effectively, but some users found it **a bit small** on mobile devices.

4. Accessibility Suggestions:

- Consider implementing **bigger text size** options to accommodate users with varying visual abilities.
- Providing the ability to **adjust text size** would enhance accessibility for a broader audience.

5. **Ranking Reasons:**

- The ranking was influenced by issues such as **missing graph headings** and the dashboard's **lengthy pages**.

6. **Improvement Recommendations:**

- **Mobile Optimization:** Simplify or adapt the design specifically for mobile users to make it more manageable.
- **Colour Moderation:** Use a **restrained colour palette** to avoid overwhelming users.
- **Labels and Tooltips:** Add descriptive labels or tooltips to aid users in understanding what each element represents.
- **Help Function:** Users appreciated the detail provided but expressed interest in having a **help function** for additional guidance.

STYLE SHEET

TYPOGRAPHY

ROBOTO
Heading 1 48
Heading 2 32

Heading 3 14

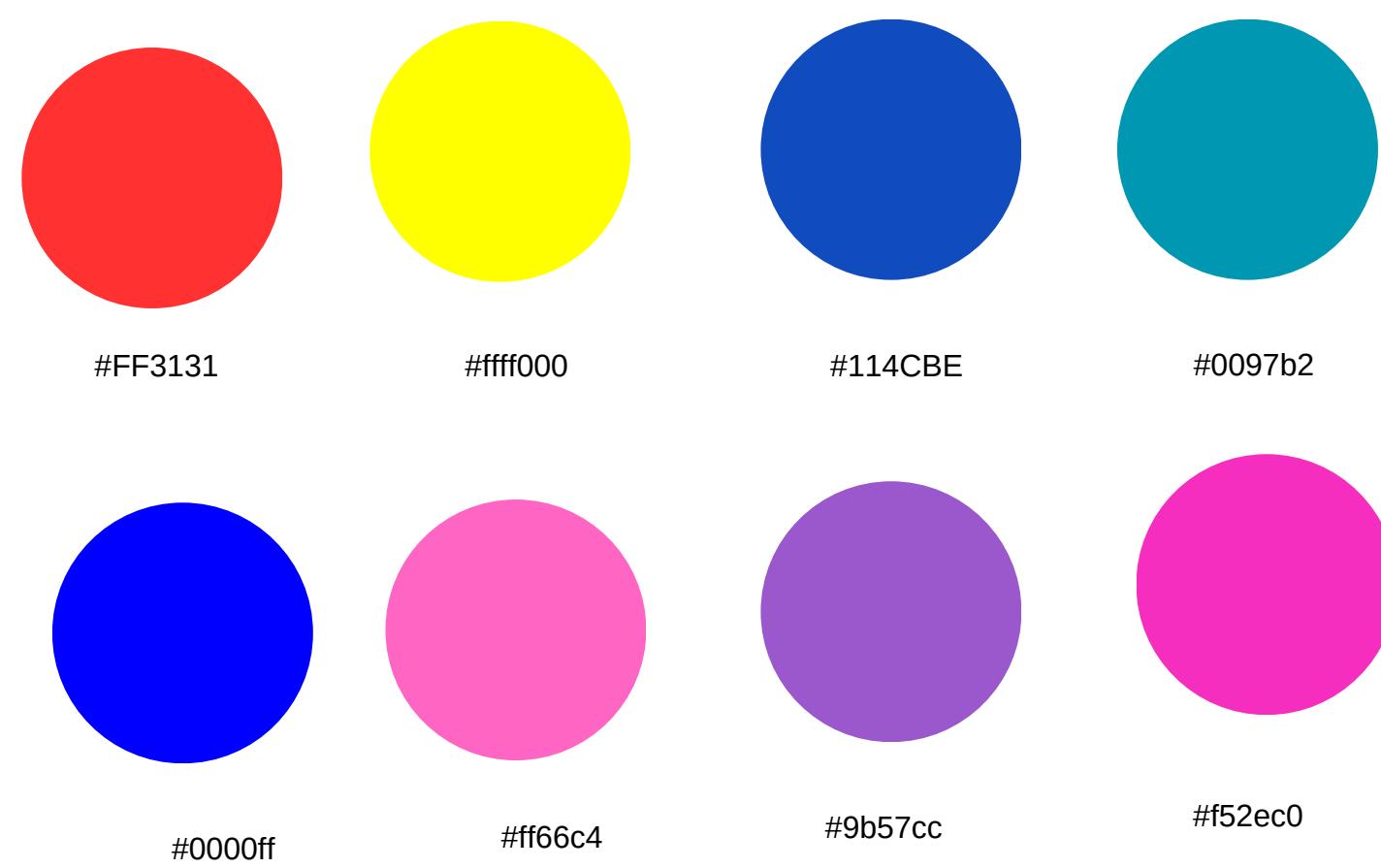
Normal Text 12

 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation

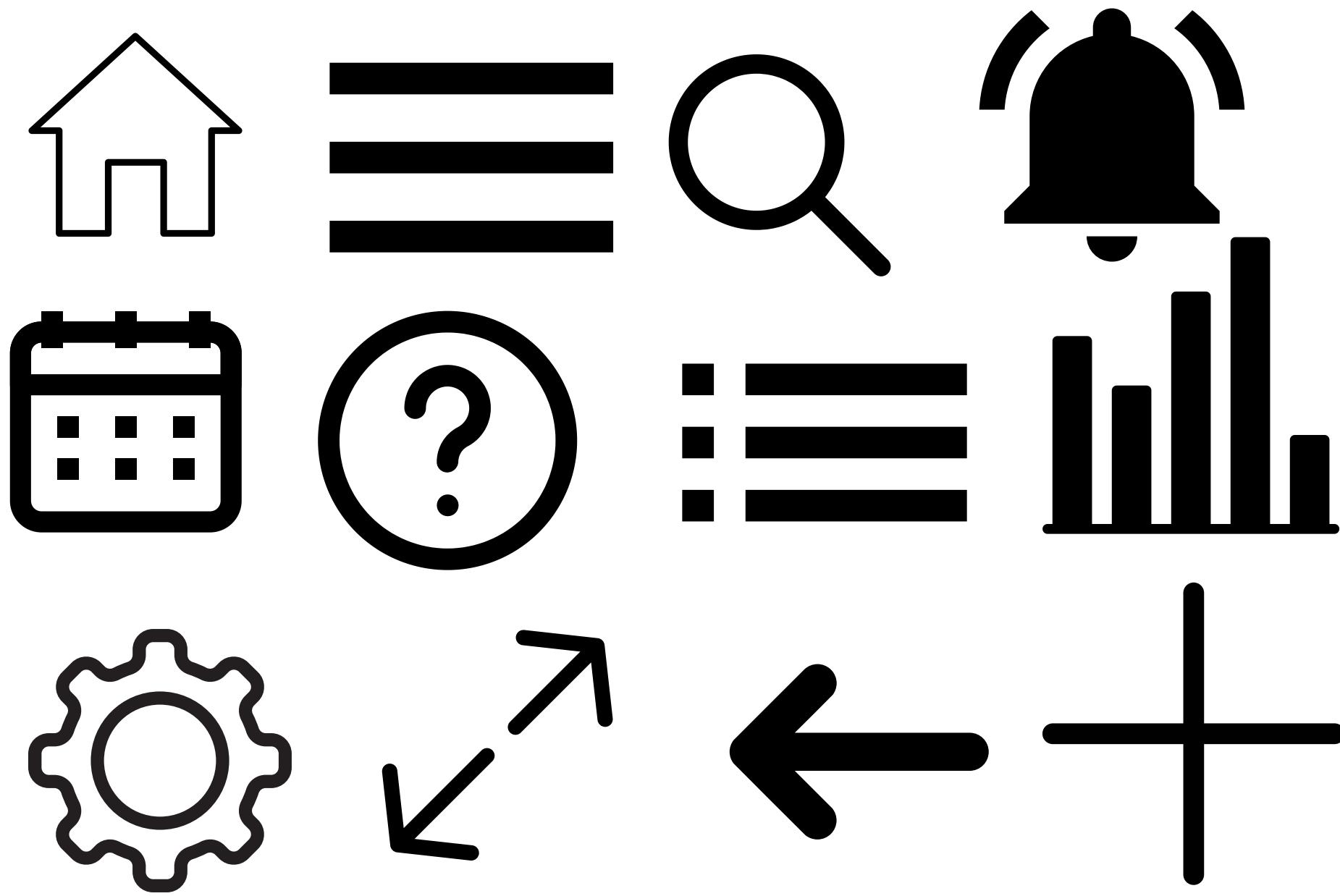
COLOR PALETTE



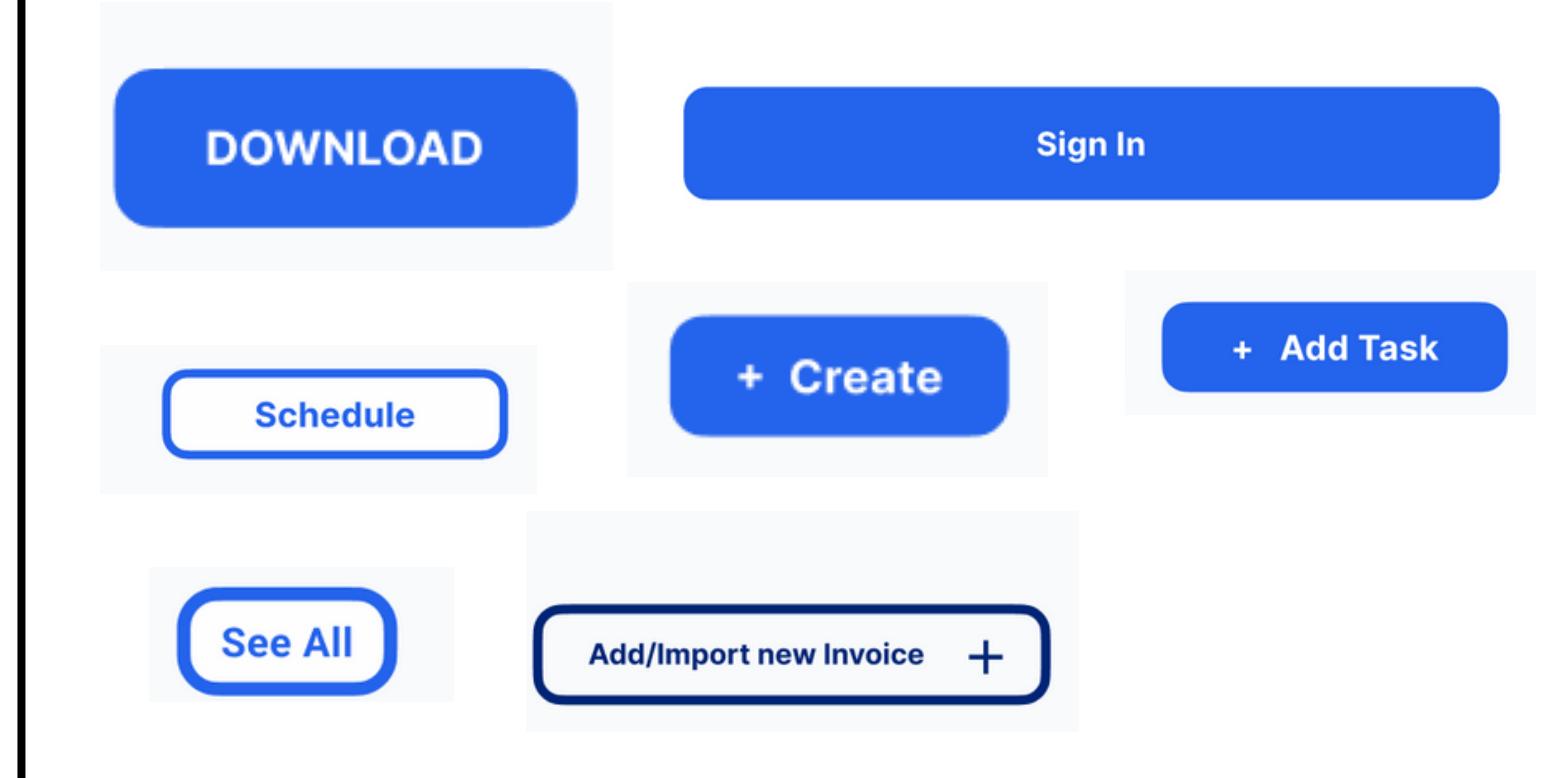
CHART COLOR PALETTE



ICONS



BUTTONS



FORM ELEMENTS AND BRANDING



FONT SIZE:

Desktop: 48 Mobile: 24

PLACEMENT

Desktop: Top left Mobile: Center