



Prepared by Brianna Roknic on behalf of Team Ninjas

happy hive

Intelliware Challenge

Financial Dashboard Development

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Team Members

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Introduction



This dashboard is designed to meet the needs of users who require simple, clear access to their account balances and recent transactions. The dashboard's primary function is to display account balances and recent transactions without unnecessary complexity.



User Persona - #1 - Sarah



Name

Sarah

Archetype

The tech-novice household manager

Persona quote:

I just need something straightforward to keep track of my family's finances. Simplicity is key.

Age:

45

Location:

Ottawa

Education:

College degree - office admin

Occupation:

Stay-at-home parent

Tech. Abili

Low to moderate

Salary:

Household income \$70-\$90k

Personality Traits & Behaviours:

Sarah is methodical, organized, and responsible. She enjoys keeping track of her family's financial well-being but values ease of use over complexity. Her focus is on balancing multiple accounts efficiently, while staying up to date with basic financial information. Prefers minimal interaction with the tool. Wants a clean, functional dashboard where key information is immediately available without unnecessary clicks.

Bio:

Sarah is a 45-year-old stay-at-home mom in Ottawa. She manages her household and budget for her family of four, leveraging her high school diploma and some college courses in office administration. Sarah values simple, user-friendly financial tools to keep track of her family's spending efficiently.

Personal Goals / Other Adjectives:

Easily view current account balances and recent transactions

Understand the family's monthly spending without complex data visualizations

Quickly categorize expenses (groceries, utilities, school fees)

Frustrations / Pain Points / Reservations:

Overwhelmed by complicated financial tools

Finds advanced features and customization unnecessary

Needs a simple dashboard with minimal navigation steps

Potential Solutions:

- **Clear Navigation:** A home screen that immediately displays account balances
- **Visual Simplicity:** Simple fonts and large, easy-to-read figures
- **Basic Categorization:** Automated transaction categorization for groceries, utilities, etc.

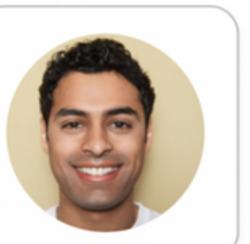
User Story - Sarah

Sarah - The Tech-Novice Household Manager

- As Sarah, I want to see my account balances clearly on the main screen so that I can quickly check how much money is available for my family's expenses.
 - **Priority:** High
 - **Acceptance Criteria:** Account balances should be visible on the home screen without the need for additional clicks.
- As Sarah, I want to easily categorize my expenses (groceries, utilities, etc.) so that I can keep track of my family's spending without doing it manually.
 - **Priority:** Medium
 - **Acceptance Criteria:** Transactions should automatically be sorted into categories with minimal manual input.
- As Sarah, I want to navigate through the dashboard with ease so that I don't get confused or overwhelmed while checking my financial data.
 - **Priority:** High
 - **Acceptance Criteria:** Simple, intuitive navigation with clearly labeled sections and minimal sub-menus.



User Persona - #2 - Mark



Name

Mark

Archetype

Busy Professional

Persona quote:

I need quick access to my account balances and transactions—time is money.

Age:

34

Location:

Toronto

Education:

MBA

Occupation:

Sales Manager at a mid-size company

Tech Abili

Moderate to high

Salary:

\$90k - \$150,000/year

Personality Traits & Behaviours:

Mark is goal-oriented, decisive, and driven by efficiency. He has a busy lifestyle and wants quick access to his finances without unnecessary frills. He's highly focused on productivity and often multitasks, so he needs financial tools that are fast and reliable. Seeks speed and functionality. Prefers single sign-on, fast data retrieval, and clear visuals to avoid wasting time.

Bio:

Mark is a 34-year-old senior project manager residing in Toronto. With a Master's in Business Administration, he has a successful career in finance. Mark appreciates efficient tools that provide real-time financial updates, allowing him to manage his investments and account balances with minimal effort.

Personal Goals / Other Adjectives:

See an accurate, real-time overview of all financial accounts

Ensure that recent transactions are accurately recorded and categorized

Monitor personal finances quickly between work tasks

Frustrations / Pain Points / Reservations:

Limited time for manual categorization or setting up complex features

Frustrated with cluttered dashboards and too many customization options

Needs real-time updates to track accounts in a fast-paced environment

Potential Solutions:

Real-Time Account Balances: Immediate display of accurate financial data

Clean and Minimalist UI: Avoid distractions and allow for fast navigation

Recent Transactions at a Glance: A brief summary of recent financial activity

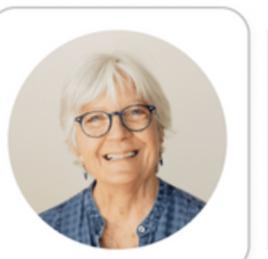
User Story - Mark

Mark - The Busy Professional

- As Mark, I want to see real-time updates on my account balances so that I can manage my personal finances quickly during a busy workday.
 - **Priority:** High
 - **Acceptance Criteria:** Account balances should refresh in real-time to reflect recent transactions.
- As Mark, I want to view recent transactions at a glance so that I can track my spending without navigating multiple menus.
 - **Priority:** High
 - **Acceptance Criteria:** A recent transactions summary should be visible on the dashboard's main screen.
- As Mark, I want to use a minimalist dashboard with minimal clutter so that I can focus on the financial data without being distracted by extra features.
 - **Priority:** High
 - **Acceptance Criteria:** The dashboard should be simple, with no unnecessary visual elements or features.



User Persona - #3 - Emily



Name
Emily
Archetype
Retiree with Fixed Income

Persona quote:
I want a clear, simple view of my finances that's easy on the eyes.

Age:
68
Education:
Bachelors Degree - Social Work
Tech Abili:
Low

Location:
Victoria, British Columbia
Occupation:
Retired
Salary:
\$30 - \$50k (pensions) CPP, OAS

Personality Traits & Behaviours:
Emily is relaxed, patient, and values simple, intuitive solutions. She isn't tech-savvy, so she appreciates tools that are accessible and easy to navigate. Visual clarity and ease of use are paramount for her to avoid frustration. Needs a clear, clutter-free interface with large text and easily understandable categories. Accessibility is critical, with simple navigation paths and no unnecessary technical features.

Bio:
Emily is a 68-year-old retiree living in Victoria. After a 30-year career as a social worker, she enjoys her hobbies and family. With a modest pension, Emily values straightforward financial management tools that help her maintain her lifestyle without unnecessary complexity.

Personal Goals / Other Adjectives:
Understand the current account balance easily
Track monthly spending to ensure expenses stay within budget
Avoid complex budgeting tools and advanced features

Frustrations / Pain Points / Reservations:
Struggles with platforms that require frequent customization or navigation
Finds it challenging to interpret complicated charts or financial summaries
Wants straightforward access to key financial data

Potential Solutions:
Simple Display of Account Balances: Clearly visible on the homepage
Basic Spending Breakdown: A list of spending categories like bills, groceries, and healthcare
Accessibility: High-contrast design and large, readable fonts for easier viewing

User Story - Emily

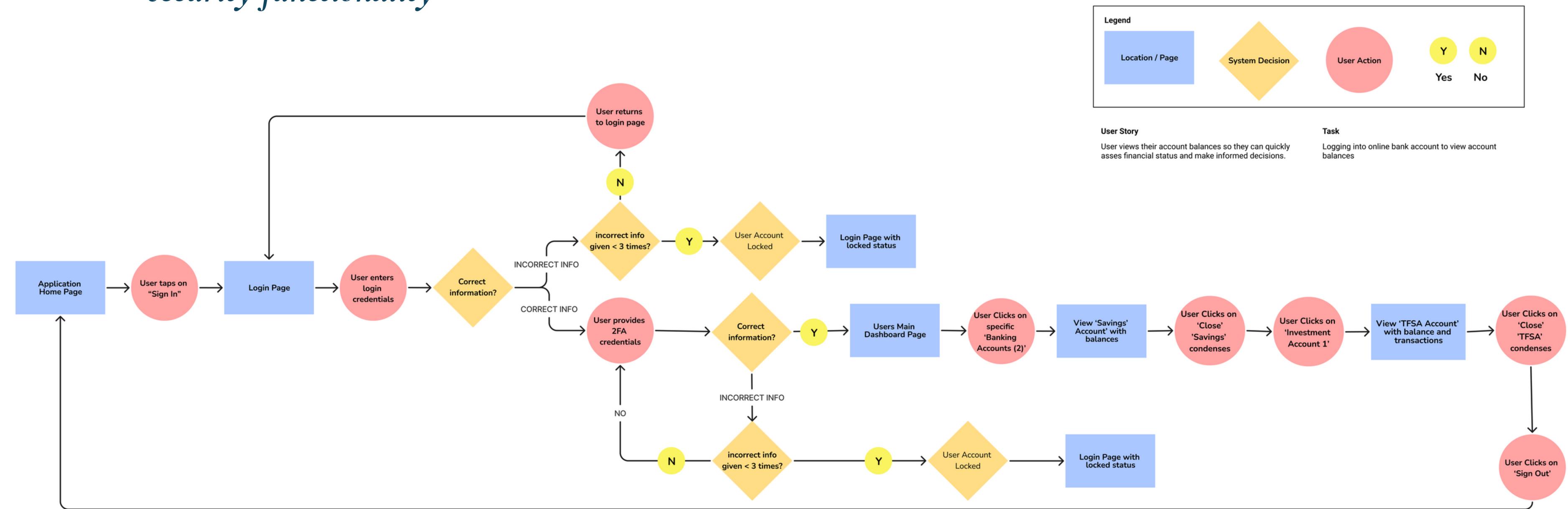
Emily - The Retiree with Fixed Income

- As Emily, I want to see my current account balances immediately when I log in, so I can quickly check how much money I have left for the month.
 - **Priority:** High
 - **Acceptance Criteria:** The dashboard should open directly to a clear display of account balances.
- As Emily, I want to see how much I've spent on essentials like groceries and healthcare so that I can make sure I'm staying within my budget.
 - **Priority:** Medium
 - **Acceptance Criteria:** Transactions should be categorized simply (e.g., groceries, utilities, healthcare) and shown in a basic format.
- As Emily, I want to use a dashboard with large fonts and high contrast so that I can easily read the financial information even with limited eyesight.
 - **Priority:** High
 - **Acceptance Criteria:** The dashboard should use large fonts and accessible color schemes to improve readability.

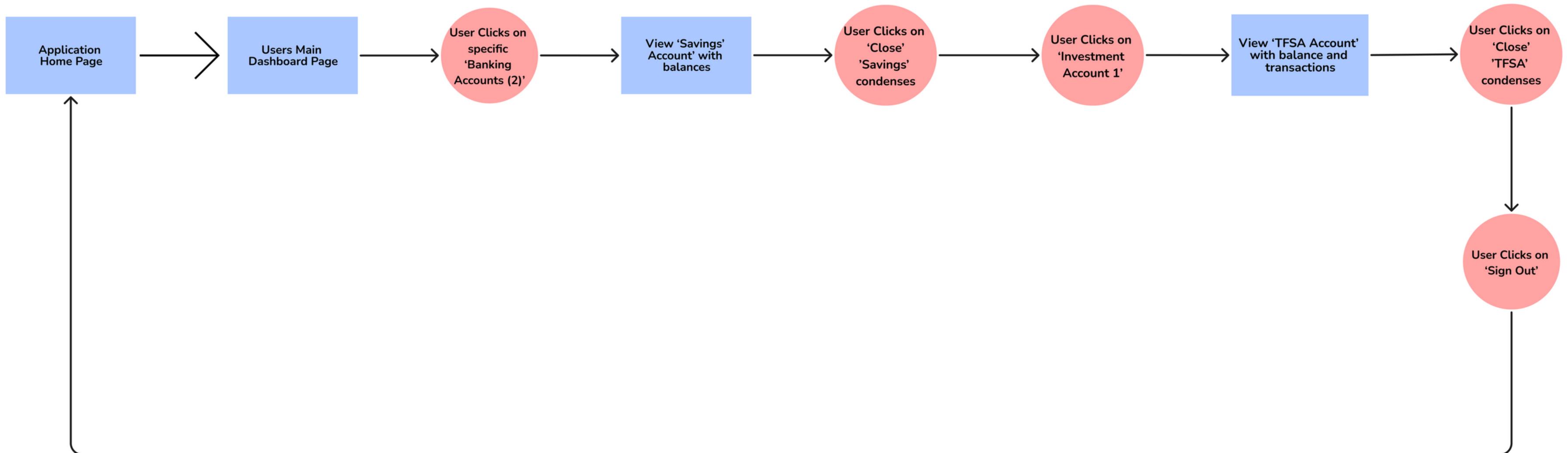


Overall User Flow

Initial user flow with full security functionality



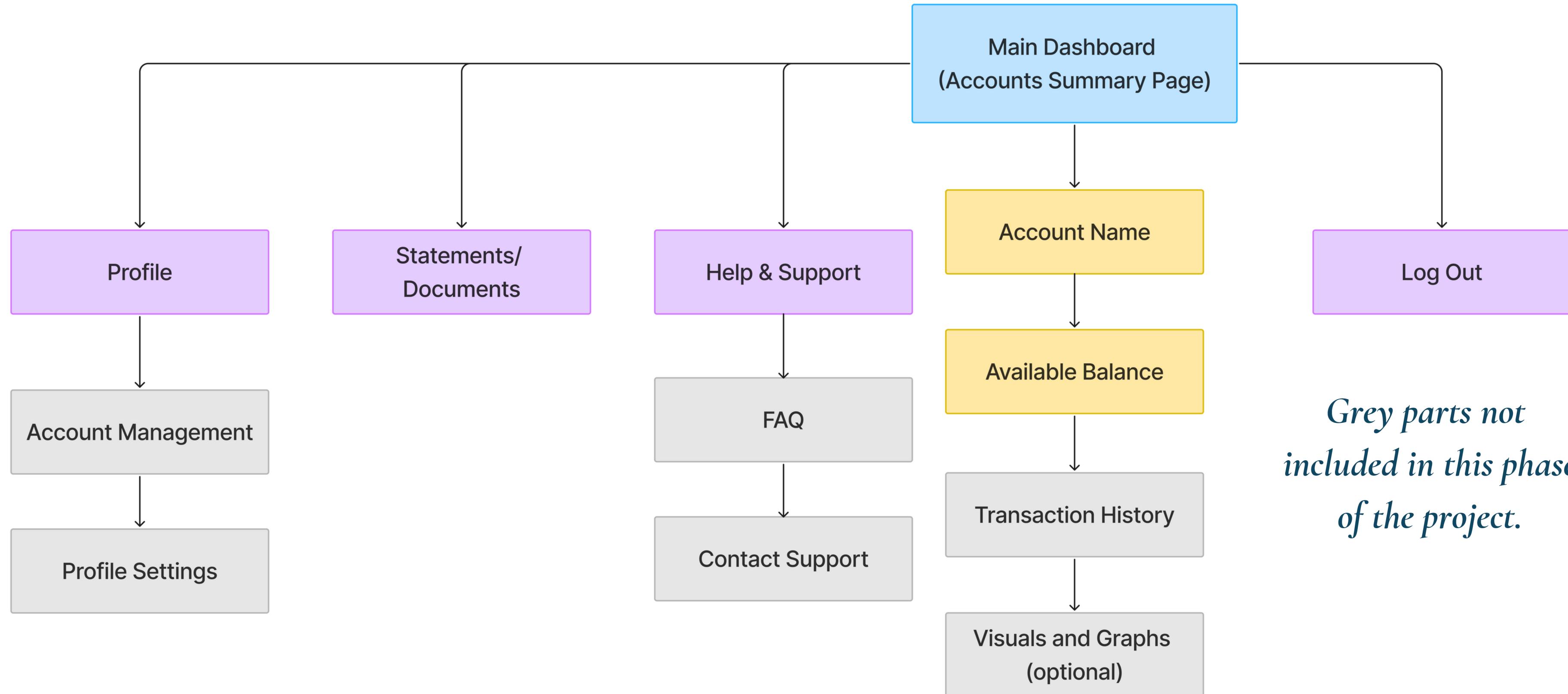
Project User Flow



*Per challenge requirements, this is
the user flow that was implemented*

Information Architecture

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Wireframes

Balance

PROFILE

DOCS

HELP

LOG OUT

Welcome

ACTIVE STATE BUTTON



BANKING ACCOUNTS (2)

TOTAL BALANCE

\$6,200.00 CAD

VIEW

INVESTMENT ACCOUNT (1)

TOTAL BALANCE

\$1,200.00 CAD

VIEW

CREDIT CARD ACCOUNT (0)

OPEN ACCOUNT

Banking Accounts

SAVINGS ACCOUNTS**TOTAL BALANCE \$5,000.00 CAD****CHEQUING ACCOUNTS****TOTAL BALANCE \$1,200.00 CAD****OPEN ACCOUNT****CLOSE****INVESTMENT ACCOUNTS****TOTAL BALANCE \$1,200.00 CAD****VIEW****CREDIT CARD ACCOUNTS****OPEN ACCOUNT**

BANKING ACCOUNTS**TOTAL BALANCE****\$6,200.00 CAD****VIEW**

Investment Accounts

TFSA ACCOUNTS**TOTAL BALANCE****\$1,200.00 CAD****OPEN ACCOUNT****CLOSE****CREDIT CARD ACCOUNTS****OPEN ACCOUNT**

MENU / HEADER BAR ACTIVE STATE BUTTON

Banking Accounts

SAVINGS ACCOUNTS

TOTAL BALANCE \$5,000.00 CAD

CHEQUING ACCOUNTS

TOTAL BALANCE \$1,200.00 CAD

OPEN ACCOUNT**CLOSE**

Investment Accounts

TFSA ACCOUNTS

TOTAL BALANCE \$1,200.00 CAD

OPEN ACCOUNT**CLOSE**

CREDIT CARD ACCOUNTS

OPEN ACCOUNT

Font

Main

Aa
Open Sans (Bold)

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()_+

Secondary

Aa
Lato (Regular)

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789!@#\$%^&*()_+

Headings

Open Sans (Bold) font for all headings. Maintain 30pt and above.

Subheadings

Open Sans (Semibold) font for all subheadings.

Paragraphs

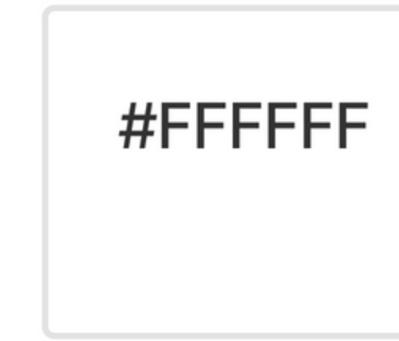
Lato (Regular) font for all paragraphs. Maintain 14pt and above.

Additional Tips

- Use Calibri, Candara, or Corbel font if proprietary fonts are unavailable.
- Pay attention to spacing, margins, and overall layout to ensure visual composition.
- Left-align all Headings, Subheadings, and Paragraphs for easy readability and visual coherence. Center or right alignment can be used sparingly but must all be centered or right aligned if used.
- Avoid overly long lines of text and overcrowding text information. This can strain reading and induce cognitive overload.
- Ensure contrast with the background for readability.

Colour Palette

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VIEW

Passive state

VIEW

Active state

UI BUTTON - HEADER SELECTION

PROFILE

PROFILE



Just text floating on header menu background



Link to Figma Page





Thank you

