

The data is quotes for mortgage insurance from the six major mortgage insurance companies in the US. I designed all of these mostly for the CEO, but some items, such as the dashboard mockup, will be viewed by clients (ranging from loan officers to executives). I have been living and dealing with this data in some form or another for the last eighteen months. I've also been involved with the testing of the two-plus new APIs that the VP of development has written, and the design and testing of two (so far) new versions of the web app that consumes the APIs.

The actual data that I used was production data from our V2 version of the web app that went live in early May of 2022. Essentially, I had roughly six months of data from one table to use. I did my best to remove duplicates, but not all were removed, because sometimes a user would change one field enough that it would skew the results significantly (for instance, running the same monetary amounts, but adding a government-backed loan program to see how the premiums would change). I did remove email addresses from the csv, as well as some other non-necessary fields. I tried to break out the five product types from the one field that they were initially stored in, but Tableau did not seem to fully recognize this, regardless of how many times I refreshed the data source.

As I have been involved with so much of the entire process, I did not necessarily come into this using the exact steps of the workflow in order – however, most of the steps were performed, although in a more organic fashion. Our daily scrums often devolved into design meetings. I actually had a design meeting this morning prior to our scrum for a different product.

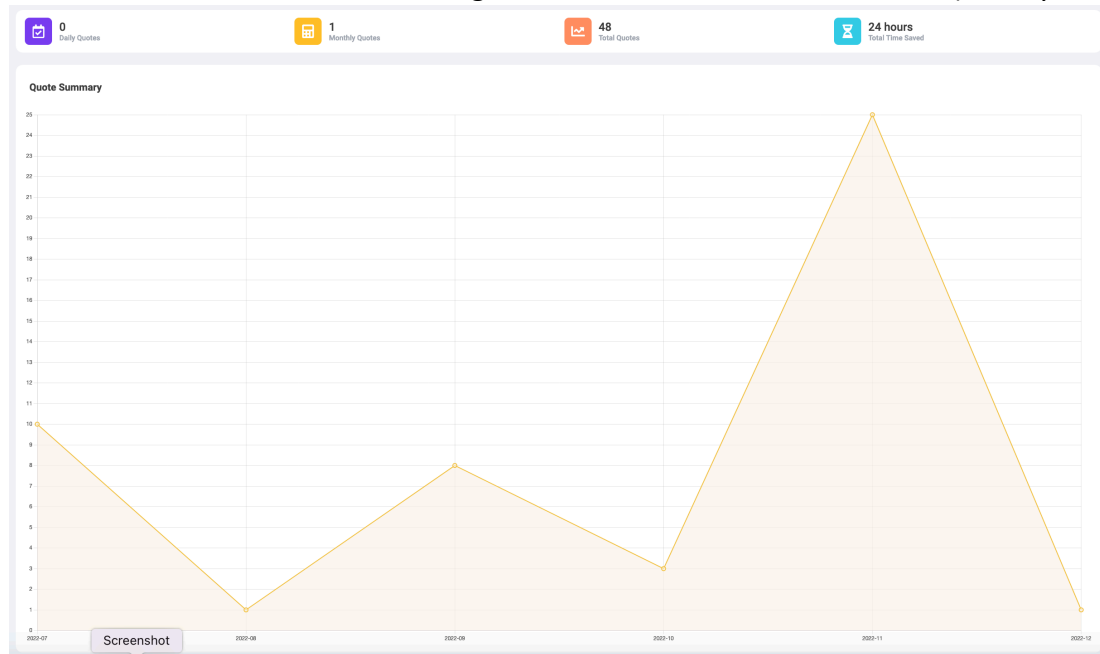
Some of the issues I encountered had to do more with my inexperience with Tableau. I know that when the dashboard that I have the mockup of is coded, there is a 99% chance that it will be done with Javascript/React, and any backend work will be done in PHP. I struggled with trying to get only what was wanted on the dashboard in Tableau (which is why it isn't there). I also had problems trying to recreate things I had done previously (as on the Credit Scores sheet). Obviously, now I know that Tableau was probably not the best tool for the job at this point in time.

For the charts I did in Tableau, I used both bar and line charts. I struggled some with getting everything to work properly with the chart types that I wanted to use. Sometimes the default chart type that appeared when I placed my fields worked without my needing to do anything/without having to fight it. I do want to experiment with some of the other chart types in the future. Doing the actual charts was incredibly time consuming – even knowing exactly what I wanted to do, getting the chart completed might take several hours. There were some charts that I spent upwards of six hours on before tossing them and doing something completely new and unrelated.

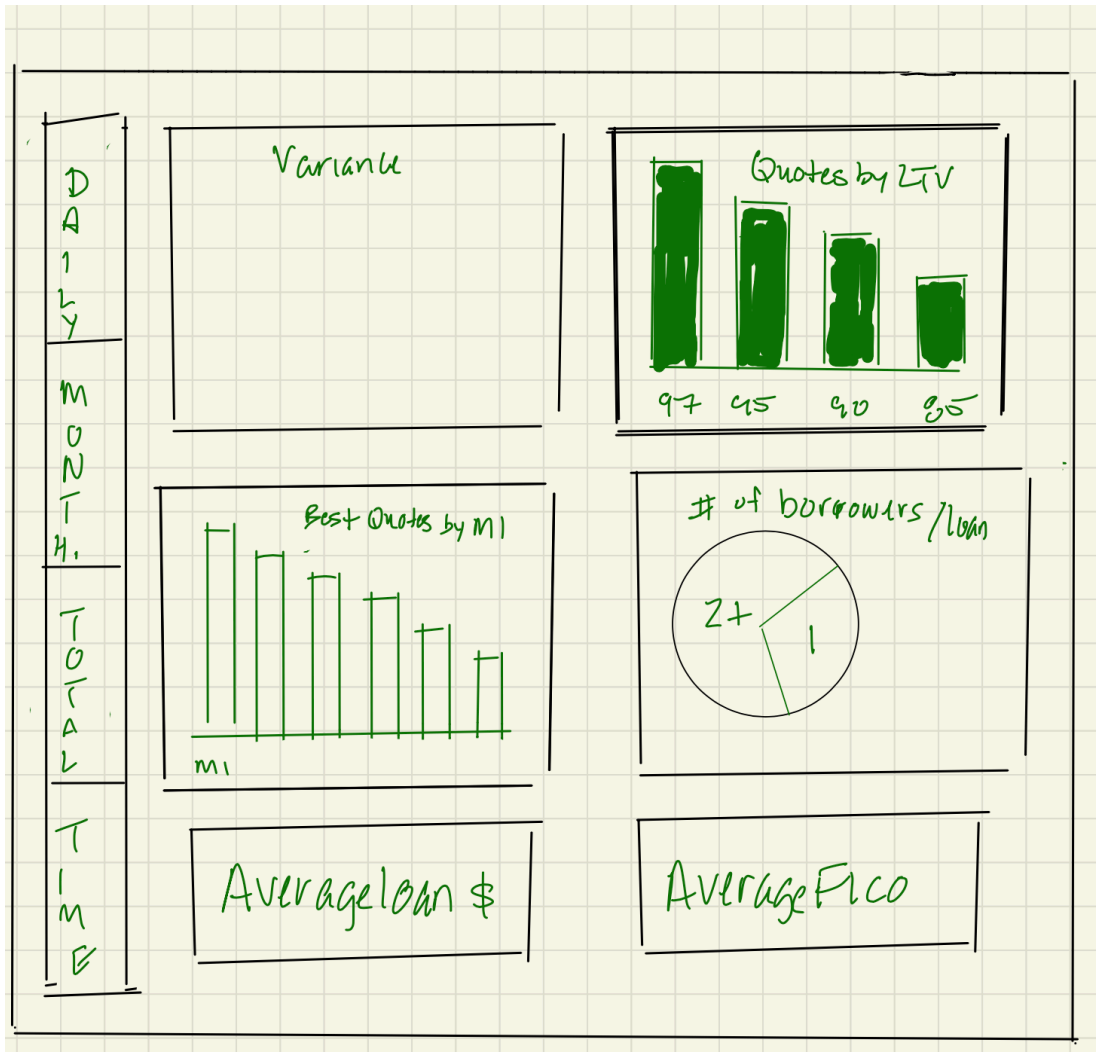
Another area in which I struggled was with stopping – *why yes, I do have a bit of a perfectionist streak*. I have several more visualizations that I would like to do – we have rough designs for more reports/visualizations that need to be done. In regards to perfectionism, it definitely affected my composition. I am one of those people who often only sees the typo and misses everything else.

Below are some examples of a dashboard.

This is the current dashboard for Organization Admins and Loan Officers (not my design):



This was the initial quick layout for the new Organization Admin dashboard:



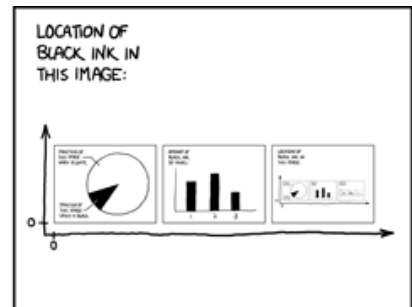
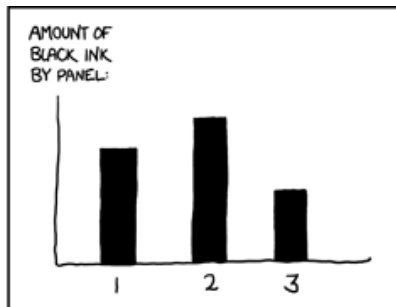
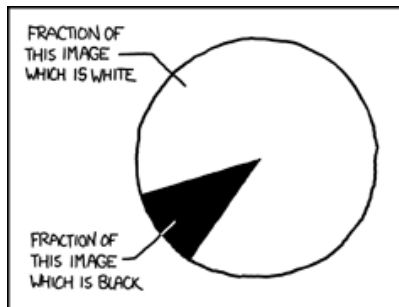
The CEO and I discussed this design, and decided to move the side bar back to the top.

This is my new dashboard design for Organization Admins and Loan Officers:



I know when this dashboard is implemented the colors will be changed back to the original color scheme. Actually, all of the visuals, if used, will use the company's color scheme.

Fin.



<https://xkcd.com/688/>