

Dashboard Designs

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Dashboards for Enterprise Level Applications

Overview:

In the past years, I have explored various dashboard concepts for various web based applications, including Financial Professional Gateway, Test Enrollment System, WebCRD, and National Mortgage Licensing System (NMLS) in FINRA. Some of visual representations and visual components has been applied pervasively across the corporation and adopted by many other projects as a pattern.

My Role:

Design dashboards, visualize information, exemplify interactivity according to requirements from business stakeholders. Iterate design with product and engineering teams to enhance visual aesthetics and discoverability of design.

FINRA EWS & FinPro Concepts

This conceptual dashboard for FINRA EWS and FinPro illustrates a modular approach. It includes a search bar for bank/program, quick links to various services, and a summary section with recent activity. The right side features a detailed view of state registrations for Christine Poppins, including tasks, activities, and document uploads.

FINRA Web CRD

The Iteration of various concepts for WebCRD that conveys the professional brand and voice from regulatory service.

Three iterations of the FINRA Web CRD interface are shown. The first iteration has a dark header and a grid of activity types. The second iteration has a light header and a more organized grid. The third iteration is a clean version with a light header and a large central activity list.

Unified Design Solution

Derive finalized UI concepts to FINPRO dashboard and NMLS for similar design treatment and visual consistency.

A comparison of the unified design solution for FINPRO and NMLS. Both dashboards share a common header with 'Home', 'Individuals', 'Branches', 'Company', 'Reports', and a search bar. The FINPRO dashboard shows a company profile, announcements, and a map of US states with registration status. The NMLS dashboard shows a map of US states with license status and a sidebar for user management.

Firm Dashboard Design

Overview of firm profile including sizes, branches, registrations and regulatory actions taken on the national level.

Three firm dashboard designs are shown. The ABC Trading Firm dashboard includes sections for firm status, reporting statistics, and reporting processing. The Bidding Mortgage Company dashboard is a complex multi-page layout with tabs for Home, Reporting, Individuals, and Reports. The New York Office of Financial Regulation dashboard is a mobile-optimized view with sections for Home, Reporting, Individuals, and Reports.

Other Dashboard Mockups