



# Project Plan Presentation

## UWM IT Goals Dashboard

The Capstone Experience

Team UWM

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*From Students...  
...to Professionals*

Fall 2025

# Project Sponsor Overview

- Nation's largest mortgage lender, headquartered in Pontiac, MI
- Founded in 1986 (originally Shore Mortgage)
- #1 Overall & Purchase Lender in the U.S. (2025)
- Industry leader in mortgage technology and broker partnerships



# Project Functional Specifications

- Create a dynamic dashboard to replace static tables
- Displays monthly and year-to-date progress
- Integrates API updates for automated data
- Key Benefits:
  - Boosts employee productivity – daily user visits
  - Simplifies progress inputting and tracking
  - Makes data visual and engaging
  - Assist resource allocation



# Project Design Specifications

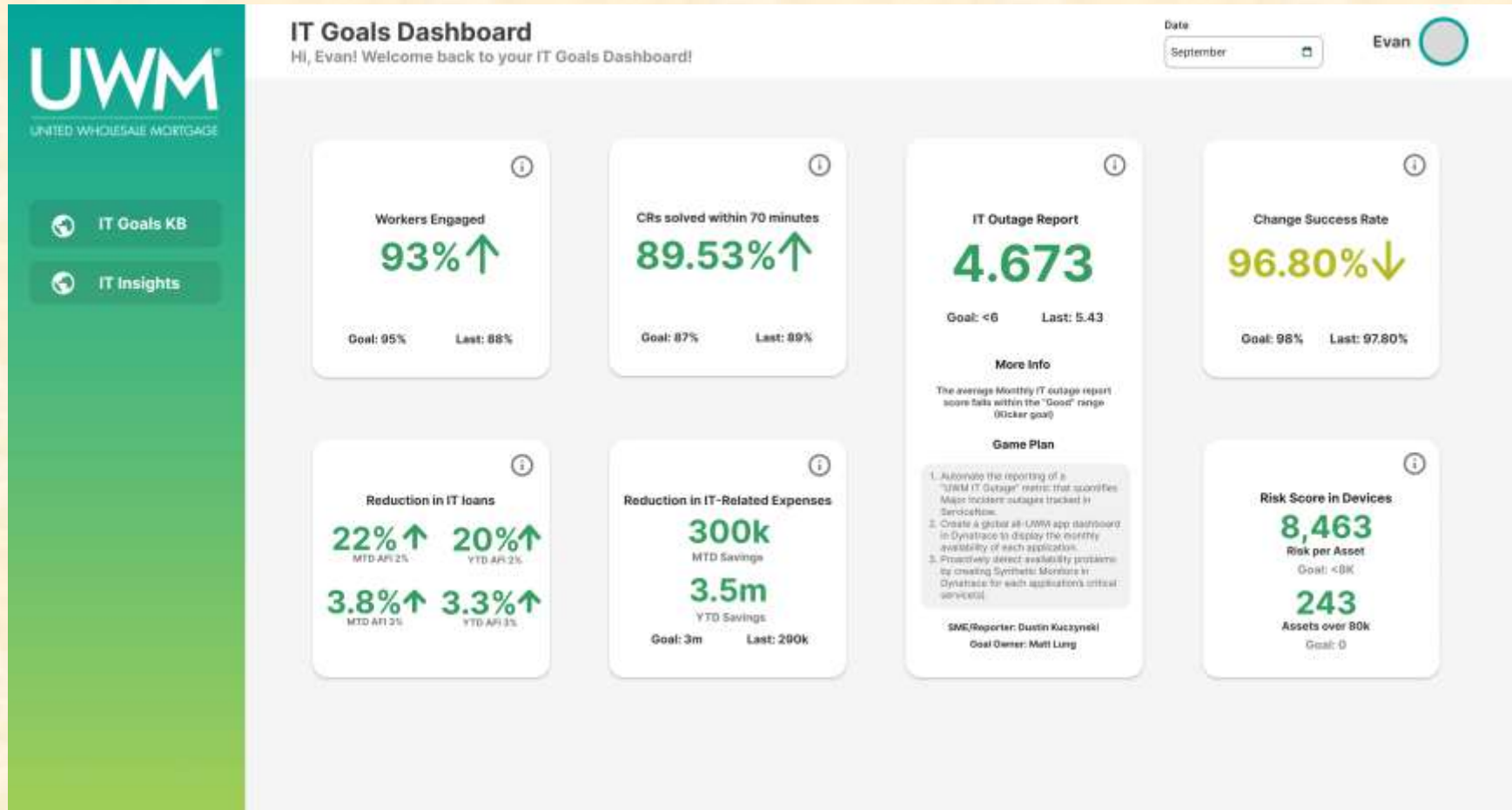
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The IT Goals Dashboard will allow department members to view goal progress based on the month and year selected

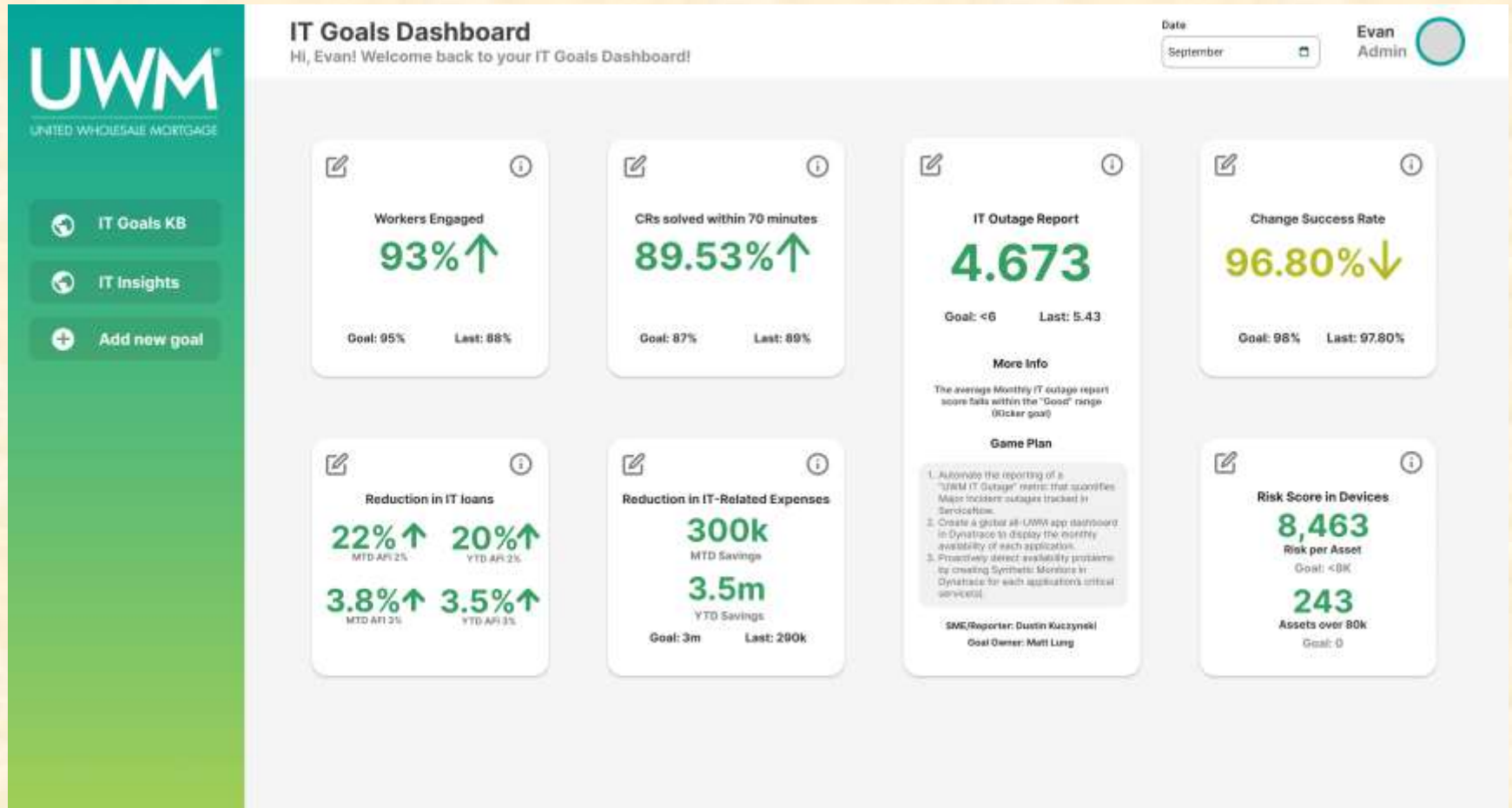
- Admins can edit and add new goals
- Users can view detailed information about each goal
- Ability to load prior years and months analytics
- Follows UWM's Branding Standards



# Screen Mockup: User-Side Dashboard View

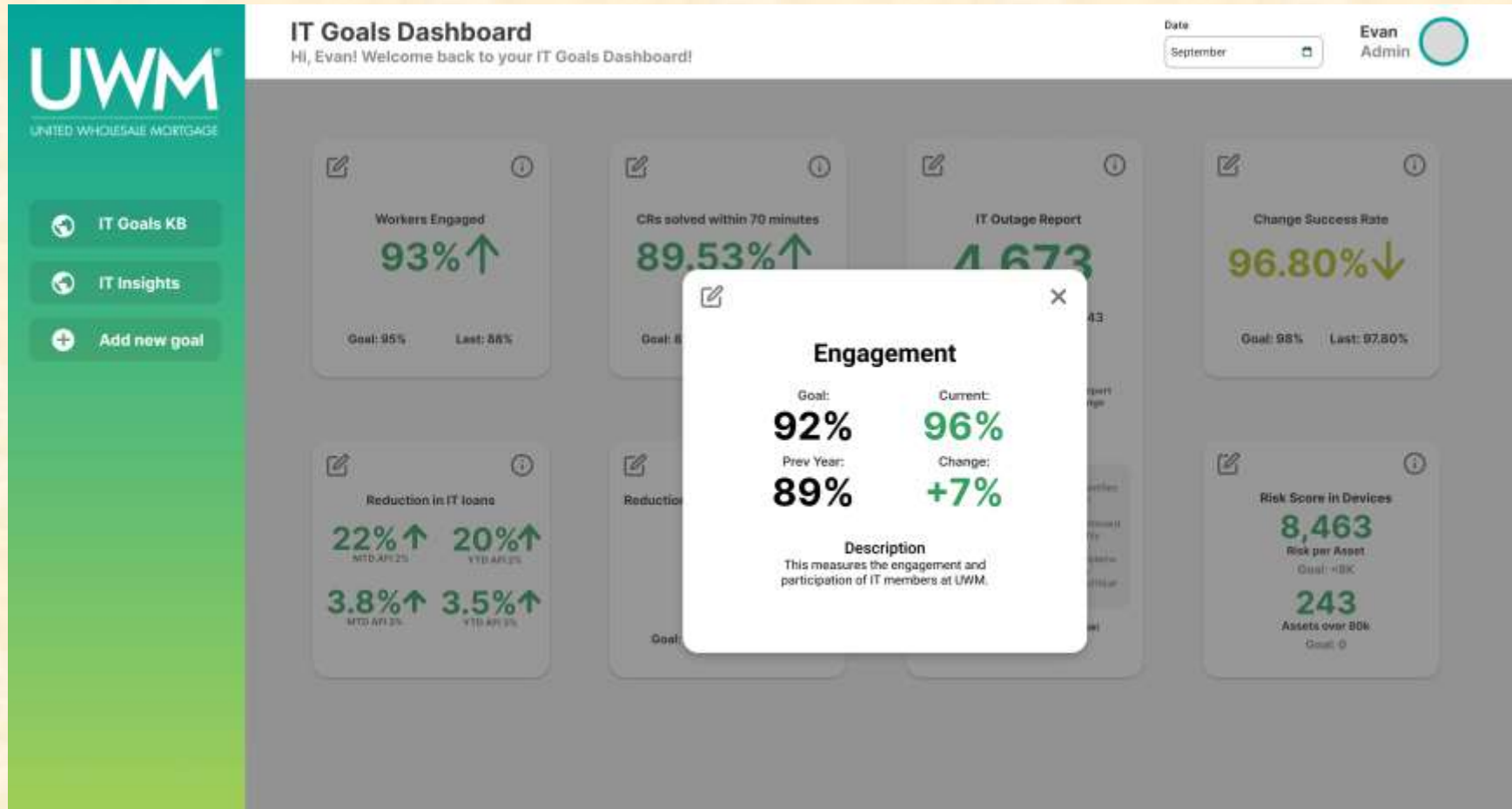


# Screen Mockup: Admin-side Dashboard View

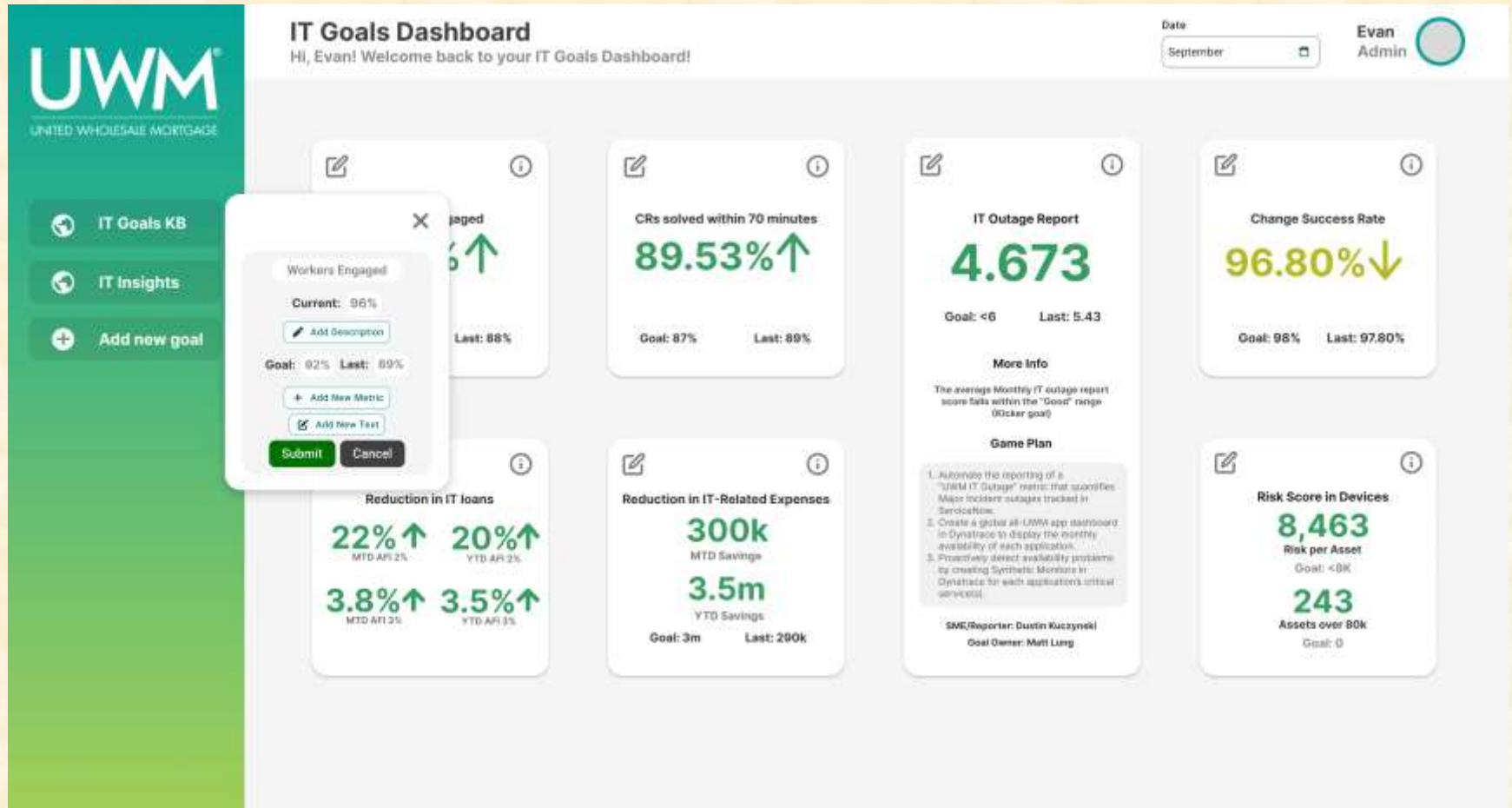




# Screen Mockup: Information Modals



# Screen Mockup: Admin-side Edit Modal





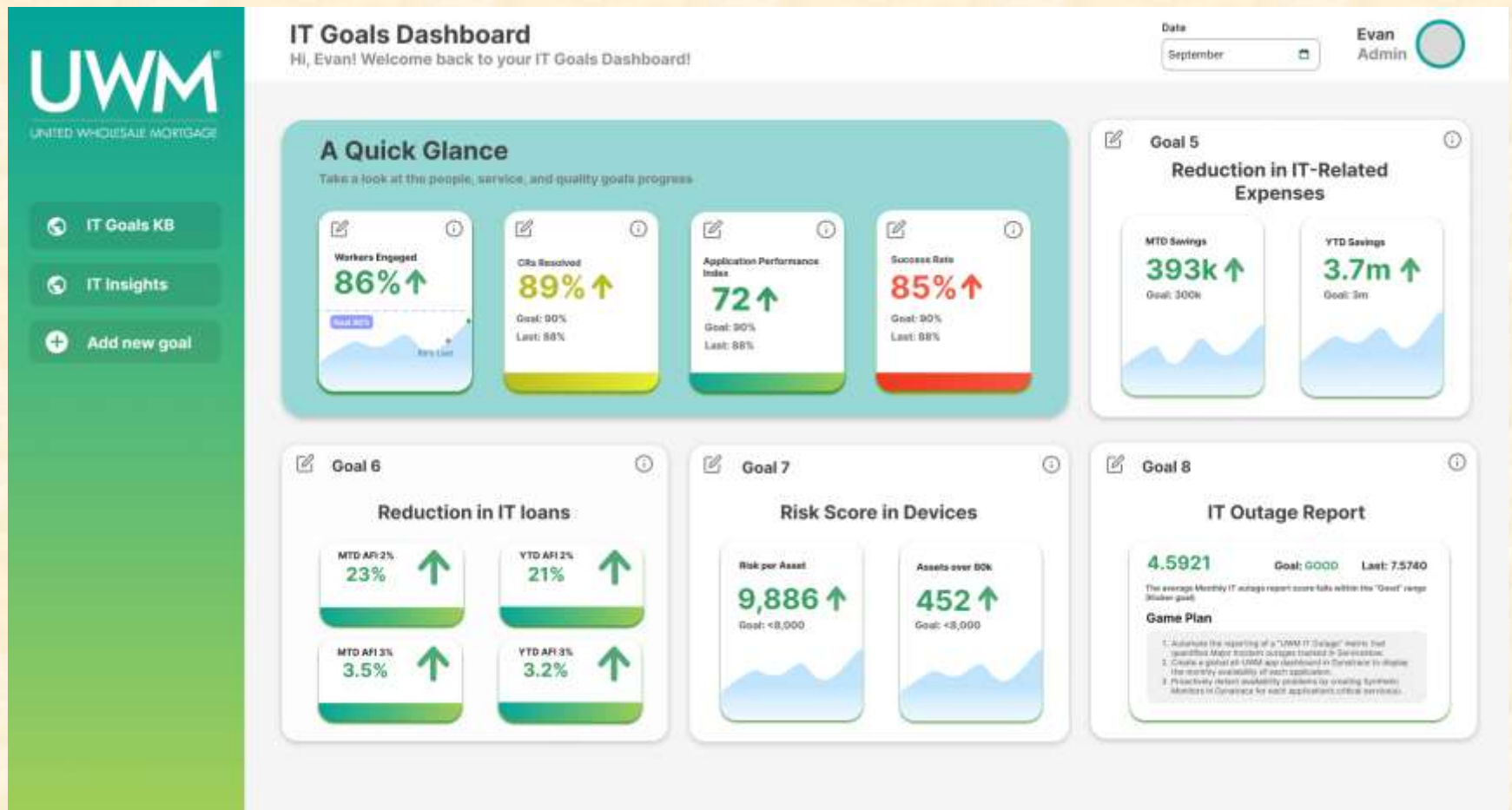
# Screen Mockup: Add New Goal Modal

The image shows a screen mockup of the 'Add New Goal Modal' in the UWM IT Goals Dashboard. The dashboard header includes the UWM logo, the title 'IT Goals Dashboard', a welcome message 'Hi, Evan! Welcome back to your IT Goals Dashboard!', a date selector set to 'September', and the user name 'Evan Admin' with a profile icon. The left sidebar contains links for 'IT Goals KB', 'IT Insights', and 'Add new goal'. The main content area displays several goal cards, including 'Workers Engaged' at 93%, 'Change Success Rate' at 80%, and 'Risk Score in Devices' at 8,463. The 'Add new goal' modal is open, featuring a close button (X) in the top right corner. The modal contains the following fields and controls:

- Goal Name:** A text input field with the value 'Workers Engagement' and a 'Value required' error message below it.
- Description:** A text input field with the placeholder text 'Description of the goal'.
- Add new metric:** A button with a plus icon and the text 'Add new metric'.
- Metric Label:** A text input field with the value 'MTD Savings' and a 'Value required' error message below it.
- Current Metric:** A text input field with the value '3.7m' and a 'Value required' error message below it.
- Last Metric:** A text input field with the value '2.5m' and a 'Value required' error message below it.
- Goal:** A text input field with the value '4m' and a 'Value required' error message below it.
- Submit:** A green button at the bottom left of the modal.
- Cancel:** A white button with a green border at the bottom right of the modal.



# Screen Mockup: Stretch Goal

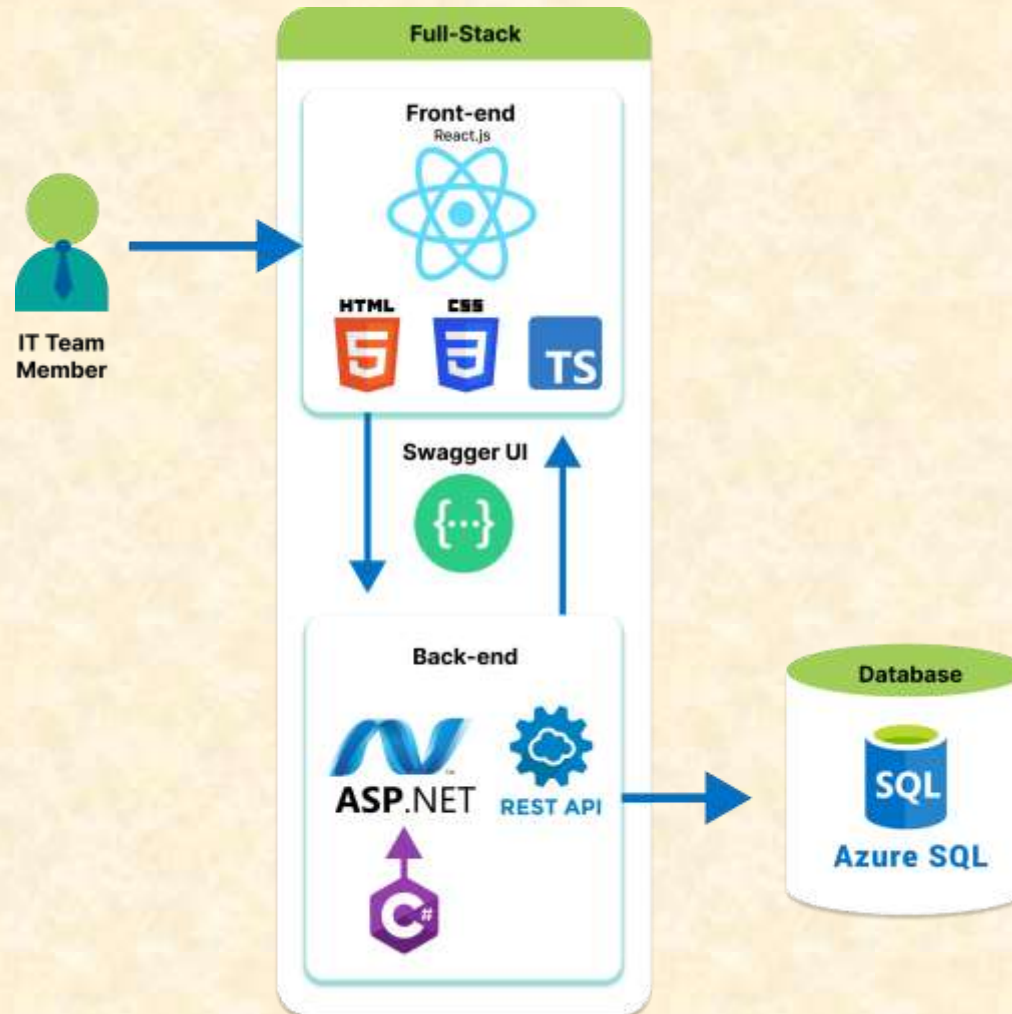


# Project Technical Specifications

- React
- Swagger UI
- **ASP.NET Core**
  - Microsoft C#
- REST API
- Entity Framework Core
- Azure SQL server



# Project System Architecture



# Project System Components

- Hardware Platforms
  - UWM Proprietary Laptops
- Software Platforms / Technologies
  - Port
  - Jira
  - Visual Studio Code & Visual Studio
  - Swagger API
  - Docker
  - Azure SQL



# Project Risks

- UWM Proprietary Packages and Software Restrictions
  - Must develop on UWM laptops
  - UWM approved tools
- Building off codebase which is outdated and malfunctioning
  - Codebase contained deep architectural errors
  - Remake codebase using functional pieces, testing frequently
- Admins can input incorrect/corrupt data
  - Can make new goals and change existing data points
  - Extensive test cases and edge case handling
- Graphs must handle different metric types
  - Goal metrics are of various forms
  - Create distinct formulas for metrics





# Questions?

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