

IT314 – Software Engineering

Group 22 – Fingenie

AI – Powered Balance Sheet Analysis Tool

Use Cases

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USE CASES

UC-01: Create Account

Actor : User

Goal : Create a new account.

Main Flow

- The user clicks "Sign Up".
- The user enters name, email, password or chooses "Sign in with Google".
- The system validates details.
- An account is created.
- The user is redirected to the dashboard.

Alternate Flow

- Email already used.
- Google login fails.

UC-02: Login

Actor : User

Goal : Log in to the system.

Main Flow

- User enters email & password.
- System validates credentials.
- Successful login → dashboard opens.

Alternate Flow

- Wrong password.
- Account disabled.

UC-03: Logout

Actor : User

Goal : Safely exit the system.

Main Flow

- User clicks Logout.
- System terminates the session.
- The user returns to the login page.

UC-04 : Upload Financial Report

Actor : User

Goal : Upload report for analysis.

Main Flow

- The user selects a file.
- System checks file type.
- File is uploaded.
- The system shows processing status.

Alternate Flow

- Unsupported file type.
- File corrupted

UC-05 : View AI Summary

Actor : User

Goal : View a basic financial overview.

Main Flow

- User opens Summary page.
- The system shows key highlights.

Alternate Flow

- Summary fails to load.

UC-06: View Ratios & KPIs

Actor : User

Goal : View calculated financial ratios.

Main Flow

- The user opens "**Ratios**".
- The system shows P/E, margins, liquidity, etc.

Alternate Flow

- Ratios fail to be calculated.

UC-07: Trend Analysis

Actor : User

Goal : View performance trends.

Main Flow

- User opens Trend Analysis.
- The system shows growth/decline trends.

Alternate Flow

- Trend data missing.

UC-8: Summary Chatbot

Actor: User

Goal: Ask questions about the uploaded report.

Main Flow

- The user asks a question.
- Chatbot responds using summary.
- The user continues the conversation.

Alternate Flow

- Chatbot does not respond.

UC-9: General AI Chatbot (Finance Learning)

Actor : User

Goal : Ask finance-learning questions.

Main Flow

- User opens AI Insights.
- The user asks a question.
- Bot explains in simple terms.

Alternate Flow

- Irrelevant answer.
- Chat not saved.

UC-10: Company Search

Actor : User

Goal : Find a listed company.

Main Flow

- User types company name or symbol.
- System returns matching results.

- The user opens the selected company.

Alternate Flow

- No results found.

UC-11: View Company Profile

Actor : User

Goal : View company information.

Main Flow

- User opens company profile.
- The system displays charts, ratios, news.

Alternate Flow

- Missing data.

UC-12: Compare Company to Sector

Actor : User

Goal : Compare company with sector.

Main Flow

- User opens comparison.
- The system shows sector averages & differences.

Alternate Flow

- Sector data unavailable.

UC-13: Compare Two Companies

Actor : User

Goal : Compare two companies.

Main Flow

- The user selects two companies.
- The system shows comparison charts.

Alternate Flow

- Data incomplete.

UC-14: News Viewing

Actor: User

Goal: Read financial news.

Main Flow

- User opens **News**.
- The system displays the latest articles.

Alternate Flow

- News feed fails.

UC-15: Blogs View

Actor : User

Goal : Read articles.

Main Flow

- The user opens the Blogs page.
- The system displays a list of blog posts.

Alternate Flow

- Blog list fails to load.

UC-16: Blog Sorting

Actor : User

Goal : Sort blogs.

Main Flow

- The user selects the sort option (Recent/Popular).
- System reorders blog list.

UC-17: Write Blog

Actor : User (Writer), Admin (Approver)

Goal : Submit a blog.

Main Flow

- The user writes a blog.
- Submit it.
- Admin reviews and approves.

Alternate Flow

- Blog rejected or requires edits.

UC-18: Word of the Day

Actor : User

Goal : Learn one financial term daily.

Main Flow

- User opens feature.
- The system displays a new financial term and its simple explanation.

Alternate Flow

- Word fails to load.

UC-19: Daily Quiz

Actor : User

Goal : Test finance knowledge.

Main Flow

- The user starts a quiz.
- Answer question.
- The system shows an explanation.

Alternate Flow

- Quiz fails to load.

UC-20: Manage API Key

Actor : User

Goal : Add or update API key.

Main Flow

- User opens Settings.
- Enter API key.
- System verifies & saves it.

Alternate Flow

- Invalid API key.

UC-21: Download Generated Summary

Actor : User

Goal : Download the generated summary

Main Flow

- The user asks a question.

- Chatbot responds with a summary.
- The user downloads the summary if desired.

Alternate Flow

- Download failed.
- Summary not generated.

Use-case Diagram:

Fingenie - Use Case Diagram

