IT314 – Software Engineering
Group 22 – Fingenie
AI – Powered Balance Sheet Analysis Tool

User Stories

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User Story 01: User Login

Front of the Card

- As an user,
- I want to be able to log in to the site,
- So that I am able to use the use it

Back of the Card Confirmation:

1.**Success:**

   I am able to log in successfully and the main dashboard is displayed.

2. **Failure:**

- The email address is in the wrong format and or incorrect.
- The username/password is incorrect.
- The user account has expired.

User Story 02: Uploading Financial Statements

Front of the Card

- As a registered user,
- I want to upload the financial statements as a PDF or Excel file,
- So that I can get a simple, easy to understand summary without needing to read complex tables.

Back of the Card Confirmation:

1.**Success:**

- The user successfully uploads a supported file type (PDF, XLS, XLSX).
- A loading or progress bar is displayed to show that the upload is in progress.
- Finally a confirmation message is shown that the file has been received and it is being processed.

2. **Failure:**

- The user uploads an unsupported file type
- The uploaded file is either corrupt or unreadable.

User Story 03: Viewing an AI-Generated Summary

Front of the Card

- As a registered user,
- I want to see an easy to understand summary my uploaded financial data considering that many people don't have a detailed knowledge of the various financial terms
- So that I can quickly understand the business's financial health and performance.

Back of the Card Confirmation:

1. **Success:**

- The summary of the key financial data is shown as output and the summary uses simple , easy to understand language.
- Important points like the profit increased by x% this quarter are highlighted.
- Important KPIs (key performance indicators) like profit margin, cash flow etc are clearly shown and explained.

2. **Failure:**

- The backend code is unable to process the data due to some error.
- The summary given is either incomplete or confusing,.

User Story 04: Viewing Visual Charts

Front of the Card

- As an user,
- I want to see the financial data which I have uploaded presented in visual charts so as to make them engaging and visually appealing
- So that I can identify and or expect future trends and compare across different time periods.

Back of the Card Confirmation:

1. **Success:**

- Suitable charts depending on the financial data are visualized.
- The charts shown are properly labelled and are visually appealing.
- The visuals generated show trends and how the data changes through the time period eg: how the revenue earned changes or how expenses/profit changes over time.

2. **Failure:**

- The charts are not generated or shown due to some error.
- The charts are either distorted or display incorrect data.

User Story 05: Identifying Potential Risks

Front of the Card

- As an individual investor,
- I want to be informed about the potential risks and or red flag indicators in the financial reports which I have uploaded,
- So that I can make more informed investment decisions.

Back of the Card Confirmation:

1. **Success:**

- Potential risks based on standard economical concepts like high debt etc are highlighted and an explanation is provided for each of them

2. **Failure:**

- Either the code is unable to give the output or fails to identify risks.
- The risk analysis is confusing/ gives incorrect information.

User Story 06: Viewing a Blog Post

Front of the Card

- As a person interested in finance and business,
- I want to view a blog page with articles and updates,
- So that I can learn more about financial, market trends, or experts blog pages so as to learn from them.

Back of the Card Confirmation:

1. **Success:**

- The blog page loads successfully and displays a list of articles in a neat and visually attractive way.
- All articles have fields like title, brief description, and publication date and also can be clicked on to read the full content.

2. **Failure:**

- The blog page fails to load due to some error.
- The user is directed to an incorrect web address .

User Story 07: Interacting with the Chatbot

Front of the Card

- As a user,
- I want to interact with the chatbot and ask question like giving additional information or explaining some terms of the financial summary generated,
- So that I can get answers to my queries and improve my knowledge.

Back of the Card Confirmation:

1. **Success:**

- The chatbot answers my question with a relevant and correct answer.
- The answers are provided in a conversational and helpful language with further options available to either help understand related concepts or explain in a different way

2. **Failure:**

- Due to some error the chatbot is not able to provide output or gives incorrect/misleading answers and or hallucinates.

User Story 08: Viewing Sector Overview Dashboard

Front of the Card

- As a registered user
- I want to view the sector overview dashboard
- So that I can understand my company's position relative to others in the same industry

Back of the Card Confirmation:

1. **Success:**

- An output page showing sector averages and benchmarks for key metrics is displayed containing charts for easier and better visualization in an engaging manner

2. **Failure:**

- The dashboard either fails to load or shows incorrect/misleading sector data.
- Charts are either missing or are mislabelled.

User Story 09: Financial News

Front of the Card

- As an user ,
- I want to be informed of the latest financial news
- So that I am aware about events and general information that might affect my businesses / economy.

Back of the Card Confirmation:

1. **Success:**

- The news page loads successfully containing recent articles and headlines for latest financial news.
- Each article shows a title, source, and publication date.

2. **Failure**:

- The news page feed fails to load or shows outdated information.

User Story 10: Word of the Day

Front of the Card

- As a user
- I want to have a Word of the Day feature
- So as to improve my financial knowledge in a simple and engaging way

Back of the Card Confirmation:

1. **Success:**

- A new word is displayed daily with its definition and a short example.

2. **Failure:**

- The word fails to load or repeats previous days words.
- The definition and or the example is incorrect/ unclear.

User Story 11: Quiz Based on Word of the Day

Front of the Card

- As an user
- I want to take a short quiz based on word of the day
- So that I can check my understanding on what I have learned from the word of the day.

Back of the Card Confirmation:

1. **Success**:

- The quiz has a question related to the recently shown word
- Correct answers are shown after users' submission along with the total score.

2. **Failure**:

- Either the quiz fails to load due to some error or the user is unable to submit his responses
- Either the questions or the answers are incorrect.

User Story 12: Searching for a Company

Front of the Card

- As a user
- I want to search for a particular company either by its name or by its symbol (ie stock market ticker symbol if available)
- So that I can view its financial details, ratios and related information

Back of the Card Confirmation:

1. **Success:**

- The search results show matching companies names
- Clicking on a company's name opens a detailed summary page with charts and ratios and other information about it.

2. **Failure:**

- The search either returns no results for correct queries or the company's data page does not load.

User Story 13: Interacting with general chatbot

Front of the Card

- As an user
- I want to chat with a general chatbot
- So as to improve my knowledge

Back of the Card Confirmation:

1. **Success:**

- The chatbot provides clear and accurate explanations for general finance related questions in simple language along with short examples and or analogies to make concepts easier to understand.

2. **Failure:**

- The chatbot gives either vague or complex answers.

User Story 14: Trend Analysis

Front of the Card

- As a user

- I want to see the trends analysis
- So that I can see how well is the company doing in recent times

Back of the Card Confirmation:

1. Success:

- Trend analysis is successfully generated and shown by the software so that the user can see the performance of companies in new/recent areas.

2. Failure:

- The trend analysis is not generated due to some error.

User Story 15: Writing a blog

Front of the Card

- As an user,
- I want to write blog pages
- So that I can share my knowledge and or get opinions/help from others.

Back of the Card Confirmation:

1. Success:

- The user is able to write blogs and upload them.

   2. Failure:

- The user is unable to upload the blogs

User Story 16: Viewing a blog page

Front of the Card

- As a user,
- I want to sort the blog pages along with the method of my choice (most popular, recent etc)
- So that I am able to receive information according to my needs/preferences

Back of the Card Confirmation:

1. Success:

- I am able to sort the blog pages according to the method of my choice and view them

2. Failure:

- I am not able to sort the blogs according to my preferences or they don't load correctly

User Story 17: Create account

Front of the Card

- As an user ,
- I want to create an account with method of my choice (use email-id/login with google)
- So that I can use all the features of the site

Back of the Card Confirmation:

1. Success:

- I am able to create an account on the site with the method of my choice (ie using any email-id or using google)

2. Failure:

- I am unable to create an account either due to failure of google sign in or nor getting login credential on my email

User Story 18: Custom Selection

Front of the Card

- As an user,
- I want to use custom selection feature
- So as to compare a particular group/no of companies for my analysis

Back of the Card Confirmation:

1. Success:

- I am able to use custom selection and compare different companies according to my analysis needs

2. Failure:

- I am unable to group a certain number of companies and compare them or their analytical data does