

Insight Layer UI Guide

This document explains each page in the Streamlit-based Insight Layer interface, who uses it, and how agents interact with the data.

1_Run_Insight_Agent.py

- **Purpose:** Lets users run a LangGraph-based agent with memory injection.
- **Who uses it:** Analysts, Strategists, Product Owners
- **What it does:**
 - Accepts a task input (e.g. "Plan a Q3 loyalty campaign")
 - Auto-parses task metadata (purpose, topic, quarter)
 - Injects relevant insights into the prompt
 - Executes an agent and stores a new insight
- **Agent use:** Generates prompts with memory, outputs are summarized and stored as new insights.

2_Bundle_Viewer.py

- **Purpose:** Explore curated InsightBundles by role, topic, or purpose.
- **Who uses it:** New hires, field teams, product managers
- **What it does:**
 - Shows reusable packs of related insights (e.g. "Loyalty Starter Pack")
 - Designed for onboarding and just-in-time learning
- **Agent use:** Agents can suggest bundles or pull insights tagged in them.

3_Bundle_Admin.py

- **Purpose:** Admin tool to create and manage bundles.
- **Who uses it:** Learning designers, leads, memory stewards
- **What it does:**
 - Select individual insights to group into a bundle

- Add metadata like name, role, summary
- **Agent use:** Auto-bundling logic adds new insights here by topic.

4_Onboarding_Insights.py

- **Purpose:** Track insight completion for learning journeys.
- **Who uses it:** Field reps, onboarding cohorts, team leads
- **What it does:**
 - Shows user-specific progress for bundles
 - Marks insights as “read” or “completed”
- **Agent use:** None directly, but completion status can influence recommendations.

5_Importance_Scoring.py

- **Purpose:** Tune how insight value is calculated.
- **Who uses it:** Admins, team leads, designers
- **What it does:**
 - Adjust weights for used, impact, recency, outcome_match, and links
 - Re-scores all insights on the fly
- **Agent use:** Importance score affects which insights are retrieved or pushed.

6_Insight_Graph.py

- **Purpose:** Visualize relationships between insights.
- **Who uses it:** Analysts, KM designers
- **What it does:**
 - Node-edge view of insight linkages (e.g. cause/effect, themes, shared files)
 - Currently static (PyVis); Neo4j planned
- **Agent use:** Auto-linking logic updates the graph structure over time.

7_Grounding_Checks.py

- **Purpose:** Verify that insights are linked to real files, dashboards, or SQL.
- **Who uses it:** Auditors, compliance, analysts

- **What it does:**
 - Shows each watch_source and whether the reference is still valid
 - Highlights ungrounded or broken sources
- **Agent use:** Grounding status can influence confidence, review status, or importance.

8_Add_Insight_From_File.py

- **Purpose:** Manually upload and annotate insights from PDFs, Docs, etc.
- **Who uses it:** Researchers, consultants
- **What it does:**
 - Adds a new InsightUnit linked to uploaded file
 - Supports badge assignment, roles, etc.
- **Agent use:** Adds searchable content to vector store and bundles.

9_Add_Insight_From_SQL.py

- **Purpose:** Add insights derived from a SQL query.
- **Who uses it:** Data analysts, BI teams
- **What it does:**
 - Input what/why/how/outcome
 - Attach query string as watch_source
- **Agent use:** Structured insights with queries can be verified via grounding checks.

10_Add_Insight_From_Notes.py

- **Purpose:** Capture unstructured notes and turn them into insights.
- **Who uses it:** Project managers, note-takers
- **What it does:**
 - Enter freeform text
 - Uses summarizer to structure into InsightUnit
- **Agent use:** Adds insights to memory; if flagged, can influence agent prompts later.

11_New_Insight_Sources.py

- **Purpose:** View all sources connected to insights.
- **Who uses it:** Admins, integrators
- **What it does:**
 - Lists all file paths, URLs, and SQL queries across stored insights
 - Allows validation and batch editing (planned)
- **Agent use:** No direct use yet, but agents could warn if links are broken.