

FDH-GenAI Enablement- (Report Agent)

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Key Intakes

	Description	OPIF id
1	Overall Intake OPIF for FDH GenAI enablement	 OPIF-189229 - FDH GenAI Enablement (Web + Mobile) WORK IN PROGRESS
2	Epic for Data for WMT Daily Sales	 OPIF-197972 - AI Chat; WMT US DST - Data PENDING SIZING
3	Epic for FDH User experience	 OPIF-197973 - FDH GenAI enablement- User Experience WORK IN PROGRESS
4	OPIF for GenAI Agent WMST DST	 OPIF-197974 - FDH GenAI enablement- AI Agent PENDING SIZING
5	FDH-Help/Support Chat	 OPIF-201286 - FDH- Help/Support chat for FDH PENDING SIZING
6	Insights and Chat Feedback Classification	 OPIF-201285 - FDH - Insights and Chat Feedback Classification WORK IN PROGRESS
7	My Assistant Chat Exp on Web	MyAssistant Enablement inside FDH web version
8	My Assistant Chat Exp on Mob	My Assistant Enablement Inside FDH Mini App
9	OPIF for Consolidated DST	 OPIF-209040 - Consolidated DST - Ticket Created BACKLOG
10	OPIF for Sam's DST	 OPIF-209042 - Sams DST - Ticket Created INITIAL REQUIREMENTS
11	OPIF for International DST	 OPIF-209045 - Intl DST - Ticket Created BACKLOG
12	OPIF for Rainbow P&L	 OPIF-212927 - OPIF for INTL Rainbow P&L READY TO START
13.	Sams P&L Data	<div style="border: 2px solid orange; padding: 10px; text-align: center;"> OPIF-208853 - Jira issue doesn't exist or you don't have permission to view it.</div>
14.	Sams P&L report build	 OPIF-208852 - Sams P&L Month end close report (Power BI) DONE

15.	OPIF for Corp P&L	OPIF-226276 - OPIF for Corp P&L - to be completed soon READY TO START
16.	OPIF for eCFR	OPIF-226277 - OPIF for eCFR BACKLOG
17.	OPIF for WMT CP P&L	OPIF-226278 - OPIF for WMT CP P&L READY TO START
18.	OPIF for Sams P&L	OPIF-226279 - Sams P&L - TBD BACKLOG
19.	OPIF for Generate Feature (Q3)	OPIF-265935
20.	OPIF for Finance Assistant Upgrades	OPIF-307347

Business Requirement Document: **GenAI Enabled FDH**

MA version of PRD- [MA - FDH Integration \(PRD\)](#)

[FDH & MyAssistant Integration - Platform Partner Onboarding](#)

Stakeholders

Role	Name
Product Team(s)	GenAI Product, FDH Product, Data Product
Product Manager	Ambika Bhardwaj, Michael Huthwaite, Blake Bornkessel, Patrick Keehn
Architect	Jyoti Anand, Sreejith, Roshni Som
Engineering	Jyoti Anand, Sreejith, Roshni Som
UX	Bob Kelly
Analytics	IR Team, PBI Semantic Team
Business	Multiple
Program	Amitesh Aggarwal, Neeraja Batta

4ITB Partners	
Business	Multiple
Design	Bob Kelly
Engineering	Jyoti Anand, Sreejith, Roshni Som
Product	Ambika Bhardwaj, Michael Huthwaite, Blake Bornkessel, Patrick Keehn

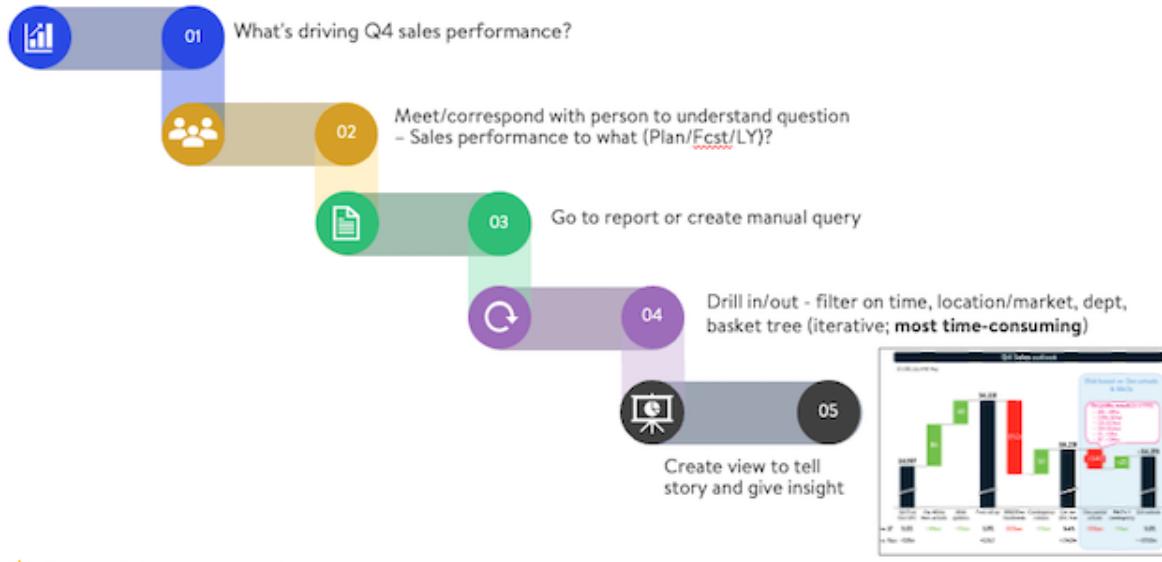
Problem Statement:

Finance associates spend significant time conducting ad hoc analysis in order to extract actionable insights from finance data. Ad-hoc analysis is time-intensive and requires technical proficiency (Excel, SQL, Tableau, Power BI) at a level beyond many finance associates' skillset. Finance associates would like to automate/streamline the routine tasks of data-searching and insight extraction in order to dedicate more time for strategic work as copilots of the business.

e.g. *Today a user looking at consolidated DST report might not get an answer to the question that- "How much is being contributed by the Walmart electronics dept to the overall Company sales?*

Finance GenAI – Problem Statement

Finance associates spend significant amounts of time on ad hoc analysis



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Vision:

To improve the user experience of finance associates by enabling proactive insights and intuitive chat capabilities to accelerate speed of "Insights to Action" without requiring them to spend substantial amount of time writing SQL or clicking through the report pages or PBI semantic models.

This GenAI enablement will enhance the use and comprehension of existing FDH reports while providing deeper access to the data assets available within the Finance Data Lake. This will enable associates access to insights and information that's not presently accessible within the FDH environment.

Mission:

To accomplish the Vision by establishing:

- Abstract layer of data semantics
- An intuitive UX user interface that will do natural language processing through the abstract layer.
- An AI agent that can provide proactive data insights and answer any questions to do the financial analysis.

To empower users with insightful, personalized, and engaging experiences that improves efficiency and trust in financial data across FDH environment.

Goal:

Empower users to save time and enhance productivity by providing automated insights, real-time answers, and proactive data-driven recommendations using GenAI.

Scope for 8/31:

To enable summarize and chat capabilities across FDH for DST and P&L suite of Datasets/reports and metrics as listed below :

Key Use Cases:



Insights at a glance

[summarize](#)



Data Q&A

[chat](#)



Custom visuals

[chat](#)



Support and guidance

[chat](#)



Key issue surfacing

[generate](#)



Personalized metric creation

[generate](#)

Features/Use Cases:

Theme		Features	Use Case	Reports (DST and P&L)	Groundtruth Docs
SUMMARY	1	Summary/Insights	Insights on metric tile (L1)	DST Reports:	DST Reports
			Insights on metric detail page (L2)	1. WMT DST 3.0 2. Sam's DST 3.0 3. International DST 4. Consolidated DST	1. WMT DST Insights 2. Sam's DST Insights 3. Intl DST Insights 4. Consolidated DST Insights
			Insights on publication/report summary (L3)	P&L Reports:	P&L Reports
			Insights on report (L4)	1. WMT CP P&L 2. Sam's MEC P&L 3. International (rainbow) P&L 4. Corp P&L 5. ENT Forecast Report (ECFR)	1. WMT CP P&L Insights (Placeholder) 2. Sam's P&L Insights (Placeholder) 3. Intl Rainbow P&L Insights 4. Corp P&L Insights (Placeholder) 5. ECFR Insights (Placeholder)
CHAT	2	Data through Q&A (CHAT)	Q&A chat on metric tile (L1)	DST Reports	DST Reports
			Q&A chat on metric detail page (L2)	1. WMT DST Chat 2. Sam's DST Chat 3. Intl DST Chat 4. Consolidated DST Chat	1. WMT DST Chat 2. Sam's DST Chat 3. Intl DST Chat 4. Consolidated DST Chat
			Q&A chat on publication/report summary (L3)	P&L Reports	P&L Reports
			Q&A chat on report (L4)	1. WMT CP P&L Chat (Placeholder) 2. Sam's P&L Chat (Placeholder) 3. Intl Rainbow P&L Chat 4. Corp P&L Chat (Placeholder) 5. ECFR Chat (Placeholder)	1. WMT CP P&L Chat (Placeholder) 2. Sam's P&L Chat (Placeholder) 3. Intl Rainbow P&L Chat 4. Corp P&L Chat (Placeholder) 5. ECFR Chat (Placeholder)
	3	Custom visuals through Q&A (CHAT)	Visuals through chat		
	4	Support and Guidance via Q&A (CHAT)	Support and Guidance for everything FDH		Support/Guidance Chat

Generate	5	Key Issue Surfacing	Notifications/Alerts/Highlights/Nudges		
	6	Personalized metric creation	Creating personalized KPI cards		
	Additional Supporting Docs:				
	1. WMT DST "Why" behind the Q&A and Data analysis- WMT DST- Why.docx 2. WMT DST Glossary and Definitions- Glossary and Definitions for DST Metrics.xlsx 3. Collibra for data- http://wmlink/collibra				

DST Reports				P&L Reports				
1. WMT Segment DST	2. Consolidated DST	3.Sam Segment DST	4. International Segment DST	1.International -Rainbow P&L	2.WMTUS-CP P&L	3.Sams P&L - MEC P&L (New)	4. Corp P&L	5. eCFR (new build)
Metrics Report Wise				Metrics Report Wise				
Comp % 454 TY (GMV) + Services like 1.0 (Includes Services with GMV	Net Sales - Total Company	454 Comp TY	Daily Net Sales - South Africa	Total GMV	Net Sales	Net Sales		Net Sales
Comp % 454 TY (Net Sales) -> same as 1.0		Net Sales (Excluding Fuel)	Daily Net Sales - Chile	eComm Net GMV	Gross Profit	Gross Profit		Gross Profit
Daily GMV Sales + Services like 1.0 (Includes Services with GMV		Total eCommerce	Daily Net Sales - China	Net Sales	SG&A	SG&A		SG&A
Daily Net Sales -> same as 1.0			Daily Net Sales - Canada	Operating Income	Membership and Other income	Membership and Other income		Membership and Other income
Digital Daily Sales -> same as 1.0			Daily Net Sales - Mexico	Net Income	Segment Operating Income	Segment Operating Income		Segment Operating Income
			Daily Net Sales - CAM	Gross Profit		Membership Count		
			Daily Net Sales - International	SG&A				
Fast Fees -> New KPI based on John Furrer's request in DST (we decided to do this in 3.0 since 1.0 was retiring).								

Functional Requirements:

#	Date Added	Priority	Feature Group	Feature Name	Feature Description /User Story	Link to Figma	JIRA#	Acceptance Criteria
1.	05 Feb 2025	P1	Summary	Summary for Metric	As a User, I want to see AI summary of a metric in, so that i can get quick insights on what is happening (30-50 words)			<ul style="list-style-type: none"> AI-generated summ should be concise (< 50 words). The summary shoul provide key insights metric trends and anomalies. Users should be abl to access this summ in the UI easily. The summary shoul update dynamically based on real-time data.

2.	05 Feb 2025	P1	Summary	Summary for Reports	As a User, I want to see Summary of a report, so that i can understand the performance on daily basis across Merchandise, Location, Channel and Calender Dimensions (100-200 words)			<ul style="list-style-type: none"> AI should generate : report summary (100-200 words). The summary shoul include key performance indicat (KPIs), trends, and anomalies. Users should be abl to view summaries based on Merchand Location, Channel, ; Calendar dimensions The summary shoul be accessible on the report page
3.	05 Feb 2025	P1	Summary	Summary for Reports(Publication)	As a User, I want to see Summary of a report Summary page, so that i can understand the performance on sales, Top Categories & regions and Trends/Anomalies (100-200 words)			<ul style="list-style-type: none"> AI-generated summ (100-200 words) sh cover sales trends, categories, and regional insights. Summary should highlight key trends and anomalies. Users should be abl to access the summ from the report publication page.
4.	05 Feb 2025	P1	CHAT	Data Q&A for Metrics	As a user, I want to ask specific questions about metrics, so that i can gain quick insights into Metrics /KPI			<ul style="list-style-type: none"> Users can ask spec questions about metrics and receive generated response Responses should include real-time da insights. Users should be abl to filter and refine th queries.
5.	05 Feb 2025	P1	CHAT	Data Q&A for Reports	As a user, I want to ask specific questions about Full report, so that i can make date driven decision			<ul style="list-style-type: none"> Users can ask questions about full reports and receive detailed answers. AI should retrieve ai display data-driven insights based on th query. Answers should include references t relevant report secti
6.	05 Feb 2025	P1	CHAT	Data Q&A for Report Summary (Publications)	As a user, I want to ask specific questions about report Summary , so that i can gain quick understanding of overall performance and key takeaways.			<ul style="list-style-type: none"> Users should be abl to ask questions ab report summaries ai get key insights. AI should provide explanations of over performance and ke takeaways.
7.	05 Feb 2025	P1	CHAT	Q&A visuals for metrics	As a user, I want to generate visualization for metrics so that i can better understand trends, comparision and key variances at a glance			<ul style="list-style-type: none"> Users can generate visual representatio (charts, graphs) for specific metrics. Visuals should incl trend analysis, comparisons, and key variance indicators
8.	05 Feb 2025	P1	CHAT	Q&A visuals for Reports	As a user, I want to generate visualization for Reports so that i can better understand trends, comparisions and key variances at a glance			<ul style="list-style-type: none"> Users can generate visual representatio for full reports Visuals should highl trends, comparisons and key performanc variances

9.	05 Feb 2025	P1	CHAT	Q&A visuals for Report Summary (Publications)	As a user, I want to generate visualization for Report summary, so that i can better understand trends, comparisions and ket variances at a glance			<ul style="list-style-type: none"> Users can generate summary-specific visualizations. Visuals should showcase trends, comparisons, and key variances.
10.	05 Feb 2025	P1	CHAT	Q&A on support and guidance for everything FDH	As a user, I want to engage with chat to get answers to my General questions on FDH Application, Reports and Metric, so that i can contact the right person for assistance			<ul style="list-style-type: none"> Users can ask general questions regarding FDH applications, reports, and metrics AI should provide relevant guidance and direct users to the right support contact
11.	05 Feb 2025	P3	Generate	Alerts	As a user, I should be able to get Alerts,Notifications and Nudges for the Metric, Reports so that i can receive proactive insights			<ul style="list-style-type: none"> Users should receive alerts, notifications, and nudges for reports and metrics. Alerts should be customizable based on user preferences. AI should proactively notify users of anomalies and key trends
12	05 Feb 2025	P3	Generate	Custom KPI	As a user, I should be able to create my own KPI or AI should suggest any new KPI.			<ul style="list-style-type: none"> Users should be able to create their own KPIs. AI should suggest new KPIs based on data trends. Users should be able to modify and customize suggested KPIs

13	25 Feb 2025	P1	All	Insight Prioritization	<p>As a finance associate, I want to receive the right amount of the most important insights relevant to my work.</p> <p>Note: There are any number of possible insights. They are all factual. But finance users don't want to be overwhelmed with too many specific insights. This is the "Goldilocks" principle of serving just the right amount. This prioritization engine will ingest all the possible AI insights and use rules/judgement to identify which are most relevant to that user.</p>			<ul style="list-style-type: none"> • Prioritization is leveraged for summary /insights feature, but can also be leveraged for chat (ie: if the user asks: "what are the insights for me today") • We will start with persona-specific prioritization, but we add user-specific rules soon • Rules for prioritization must be easily added/removed/edited by team • To start, prioritization will be based on the following values: <ul style="list-style-type: none"> ◦ Time/recency: more recent /current > older ◦ User-relevance: some users have high-level views while others focus on an SBU, region, segment, or other breakout. Prioritizes insights key to that persona groups and specific users ◦ Materiality: A spike in a massive SBU has more material than a 200% spike in a tiny department. The overall dollar impact is more material and is prioritized. ◦ Key metrics: Some metrics (like net sales, operating income, etc) are more important than others. Prioritizes key metrics of each report. ◦ Trends: Shifts in trends are important. This includes anomaly detection which can flag new trends.
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Non-Functional Requirements:

#	Date Added	Priority	Applies	Feature Group	Feature Name	Feature Description	Link to Figma	User Story	Actions
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1	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Single Sign-On (SSO) & Authentication	<p>Users are not required to sign into the platform repeatedly if they are already an authenticated user through SSO.</p> <p>If not yet authenticated, the user will be prompted to do so via Walmart's authentication platforms.</p>	N/A	<p>As an authenticated user of Insights Pro via SSO, I want to be able to access the AI Enablement on FDH (Chat, Summary, Generate) without being prompted to sign in again, so that I can seamlessly utilize the AI features without interruption.</p>	When authenticating with Insights Pro via SSO, I want to be able to access the AI Enablement on FDH (Chat, Summary, Generate) without being prompted to sign in again, so that I can seamlessly utilize the AI features without interruption.
2	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Security-User Role-based Access (RBAC)	<p>Users can only view or interact with data relevant to their roles, thereby enhancing security and data integrity.</p>	N/A	<p>As a user with a defined role within the organization, I want to only be able to view and interact with data relevant to my role within the AI Enablement on FDH, so that sensitive information is protected and data integrity is maintained.</p>	User are categorized as A User: interact with AI. Attentiveness approach indicates Sam's segment to the user.
3	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	UI/UX Consistency	<p>AI Enablement on FDH will leverage Walmart's global design system - LD3. The tool shall integrate seamlessly within the My Assistant platform.</p>	N/A	<p>As a user, I want the AI Enablement on FDH to have a consistent look and feel with the rest of the platform, following the LD3 design styles, so that I have a familiar and intuitive experience when using the AI features.</p>	The user adheres to system standards (button etc.). FDH within platform experience. Enables consistency across assistants.
5	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Scalability	<p>The application should be scalable to handle increasing volumes of the data as the business grows. It should be able to accommodate a growing number of users and data sources without sacrificing performance.</p>	N/A	<p>As a system administrator, I want the application to automatically scale to handle increasing data volumes and user load, so that the application maintains performance and availability as the business grows.</p>	The application between transaction times (TPS). The performance degrades as user count increases. System scales serve to accommodate load. Application scales with limits and thresholds.

6	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Performance	The application should be highly performant, providing fast and efficient analysis of the data even with large datasets. It should have minimal latency in generating narratives and should not hinder decision-making processes.	N/A	As a user, I want the application to generate narratives quickly and efficiently, so that I can make timely decisions based on the insights provided.	Narr does thre for da size, perfo across (Chro Perfc the a resp effici narra
7	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Browser Compatibility	The tool should be compatible with Google Chrome and Microsoft Edge. The generated narratives should be displayed correctly on desktop browsers.	N/A	As a user, I want the application to be fully functional and display correctly in Chrome and Edge browsers, so that I can use my preferred browser without encountering compatibility issues.	All fe are fu Chro The u corre adhe speci testin and a speci
9		MVP	Platform	Common Non-Functional Requirements	User Feedback Storage - Report & Metrics	Users can provide feedback on the AI generated summary insights on reports & metrics	Figma Link	As a user, I need to be able to give feedback on the AI insights shown on my reports /metrics. I want feedback to be frictionless (thumbs-up /down and optional text comments). The feedback should be stored and easily exportable so that the 4itb team can assess the performance of the model and make improvements.	

10		MVP	Platform	Common Non-Functional Requirements	User Feedback Storage - Chatbot	Users can provide feedback on the chatbot responses		As a user, I need to be able to give feedback on the chatbot responses. I want feedback to be frictionless (thumbs-up /down and optional text comments). The feedback should be stored and easily exportable so that the 4tb team can assess the performance of the model and make improvements	1. 2. 3.
11	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Training & Support	The AI solution provider should offer comprehensive training and support to the users for effectively utilizing the advanced data analysis and narrative generation capabilities of Insights AI application.		As a new user, I want to receive comprehensive training and support on how to use the application effectively, so that I can quickly become proficient in using the application's features.	Train docu vide users g., he are ir ques traini key f appl anal gen
12	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Concurrency Support	The system should support 50-100 concurrent user without performance degradation. Load testing should be performed to validate this		As a system administrator, I want the application to support 250 concurrent users without performance degradation, so that multiple users can use the application simultaneously without experiencing slowdowns or errors.	The a 250 c exce perfo Load the a supp conc appli resp conc
13	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Error Handling	The system should handle errors gracefully, providing informative error messages to the user without exposing sensitive information. Logging should capture error information for debugging		As a user, I want the application to handle errors gracefully and provide informative error messages, so that I am not confused or blocked by errors and can take appropriate action.	The a error losin are u infor issue possi infor error infor debu

14	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Chat Load Time	The chat interface should load in under 2-5 seconds. Performance testing should be conducted to ensure this		As a user, I want the chat interface to load quickly, so that I can start interacting with the chat without delay.	The c und Perf The c The I acros netw
15	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Security	The system should implement appropriate security measures to protect data and prevent unauthorized access including authorization and authentication and data encryption and regular security audit and Penetration testing should be conducted		As a user, I want my data to be protected by appropriate security measures, so that my data is not accessed or compromised by unauthorized individuals.	The a appro and a mech acce Data trans secur pene cond add Secu follow comm inject
16	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Display (Summary, Chat)	The Metric and Report Summary and Chat display for Web and Mobile will follow design specification as per figma	Figma Link	As a user interacting with the Metric and Report Summary and Chat, I want the display for Web and Mobile to follow design specifications as per Figma, so that I have	The a the d displ per th
17	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Pane Scroll Freeze	When a user hovers over one side of the screen (i.e., the data chart), the opposite side of the screen has the scroll functionality disabled, only scrolling the selected side, while the other remains in place.	Figma Link	When a user hovers over one side of the screen (i.e., the data chart), the opposite side of the screen has the scroll functionality disabled, only scrolling the selected side, while the other remains in place.	The a the d displ wher as pe
18	11 Feb 2025	MVP	Platform	Summary,Chat	Reports Supported	AI FDH features like Chat, Summary and Generate should work for DST and P&L at Metric and Report Level		AI FDH features like Chat, Summary and Generate should work for DST and P&L at Metric and Report Level	Gen/ supp and f scop
19	11 Feb 2025	MVP	Platform	Common Non-Functional Requirements	Natural Language	The system can understand /recognize basic language queries and respond to them correctly.	Figma Link	The system can understand /recognize basic language queries and respond to them correctly.	Appl enou typ'

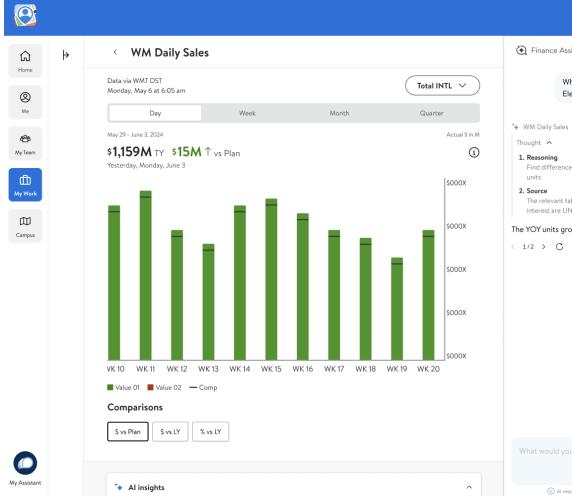
Expected and Non Negotiable features (Chat):

1	No - Negatable	Chat	Context Setting & Dynamic Passing: The system must seamlessly pass the user's current context (metric/report filters, role, session info) to the chatbot.	Without automatic context passing, users repeatedly would have to specify details, undermining the GenAI experience. Also critical for personalized responses.	Requires session synchronization and secure ways to share user context. Potentially complicated SSO and secure token exchange.	YES	P0	<p>WM Daily Sales</p> <p>Data via WMT DST Monday, May 6 at 6:05 am</p> <p>Total INTL</p> <p>\$1,159M TY \$15M ↑ vs Plan</p> <p>Yesterday, Monday, June 3, 2024</p> <p>Actual \$ in M</p> <p>Week</p> <p>Day Month Quarter</p> <p>WK 10 WK 11 WK 12 WK 13 WK 14 WK 15 WK 16 WK 17 WK 18 WK 19 WK 20</p> <p>Value 01 Value 02 Comp</p> <p>Comparisons</p> <p>\$ vs Plan \$ vs LY % vs LY</p> <p>AI Insights</p> <p>What would you like to know?</p> <p>1. Reasoning Find difference across 3/17/2025 UNITS and 3/17/2024 units</p> <p>2. Source The current table is STORE_TWN5 table. The columns of interest are UNITS, DATE, YEAR5</p> <p>The YOY units growth is \$168M.</p>	Feasible but complex
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2	Experience Imprinting	Chat	Context Retention: Ability to maintain conversation state across turns and across sessions. Currently 10 turns.	Enables multi-turn, natural language flows. Users expect the bot to "remember" prior questions, filters, or clarifications.	Storing conversation states requires a persistent data store, plus retention and compliance rules.	YES	P0	<p>The message reads: "Hello! I'm Context Retention. How can I help you today?"</p> <p>Below the message, there is a "Transcript" section showing previous turns of the conversation.</p>	<p>The message reads: "Hello! I'm Context Retention. How can I help you today?"</p> <p>Below the message, there is a "Transcript" section showing previous turns of the conversation.</p>	Doable but more mo
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3	Non-Negotiable	Chat	User Recognition & RBA: Enforce FDH's role-based access so that the bot only shows permissible data & personalized recommendations.	Prevents data leaks, meets compliance. Personalized results (e.g., only see cost data if user has cost access).	Requires tight coupling of user identity and roles from FDH or corporate LDAP. Must pass these securely to the chatbot.	NA	P0	NA	Feasible but must im-
4	Non-Negotiable	Chat	Data Consistency & Refresh Sync: The GenAI outputs must always reflect the latest FDH (Metrics and publications) and FDF (foundation assets) data refresh.	Inconsistent data undermines trust, especially in finance.	Involves real-time or near-real-time APIs, plus immediate cache invalidation.	NA	P0	NA	Trickier if separate—

5	E xp eri en ce Im pa cting	Chat	Accuracy & Source Attribution: Bot must show from which FDH report or dataset each answer /summary is derived.	Builds user trust, helps with compliance, and allows deeper exploration into the original report.	Must store metadata about data origin and references. Ideally clickable links back to FDH.	NA	PO			Need to build linking
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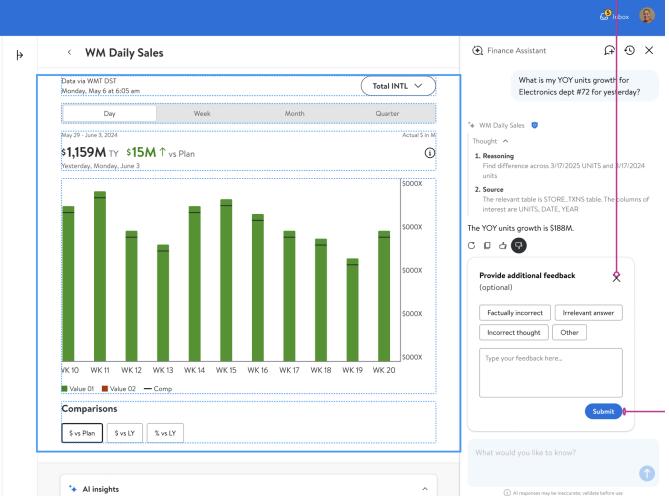
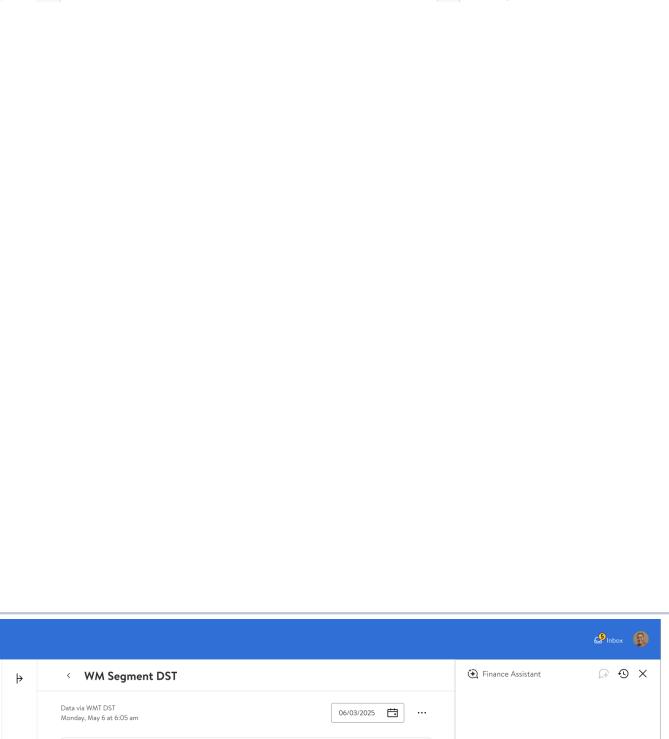
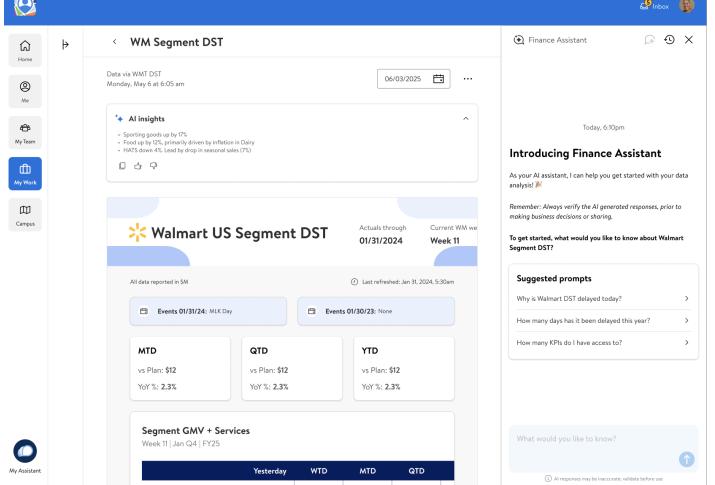
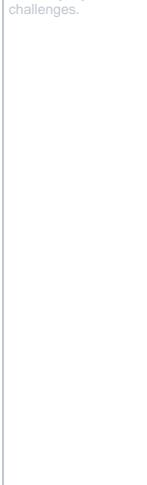
6	E xperi en ce E nhanc ing	Chat	Explainability & "Explain This": Ability for the chatbot to clarify financial terms, metric logic, steps of thought, or how a response is generated. (Real Time Streaming)	Promote s financial literacy and builds trust ("Explain why Sales margin dropped").	Needs a knowledge base or specialized "Clarity" agent. Ability to generate plain- language explanations.	U X de pe nd en t Y E S (D is cu ss) (S S E or R es t)	P0 N ee d te ch de ta il s + UX			<p>What is my YOY units growth for Electronics dept #72 for yesterday?</p> <p>1. Reasoning Find difference across 3/17/2025 UNITS and 3/17/2024 UNITS</p> <p>2. Source The current table is STORE_TDW_E table. The columns of interest are UNITS, DATE, YEAR</p> <p>The YOY units growth is \$188M.</p> <p>1/2 > C D Q</p>	Feasible but requires Thinking

Format Type
Text Formats
Lists (Bullet/Numbered)
Paragraphs
Tables
Step-by-Step Guide
Definitions
Q&A Format
Visual Formats (Charts)
Bar Charts
Pie Charts
Scatter Plots
Line Charts
Histograms
Box Plots
Heat Maps
Area Charts
Radar Charts
Treemaps
Bubble Charts
Waterfall Charts
Additional Formats
Interactive Dashboards

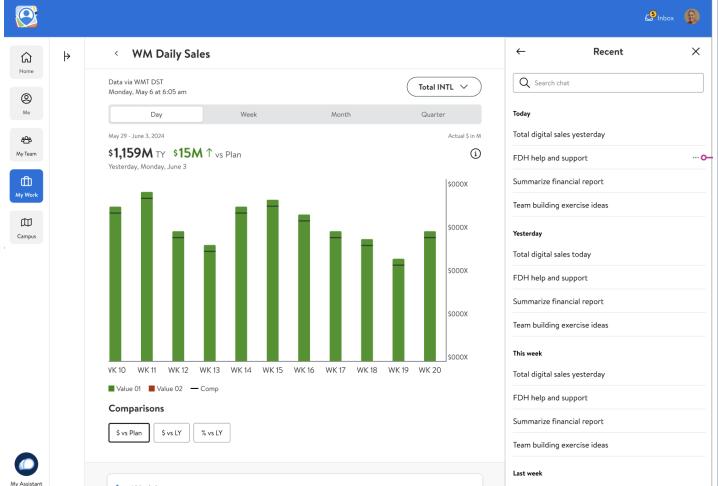
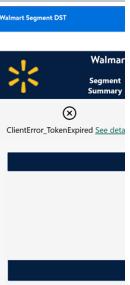
7	Experience Impacting	Chat	Drill-Down & Clarification in Chat: Users might start at a high-level metric, then want deeper breakdowns.	Makes the chat more powerful and flexible. "Show me top 5 stores" "Compare to last month."	Requires multi-turn context plus robust FDH queries. Must handle incremental filters.	NA	P0		Every drill-down call
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8	Nice To Have	Generate	Nudges & Proactive Insights: Bot would need proactively alert anomalies or threshold violations (e.g., margin drop).	Shifts from reactive Q&A to proactive intelligence. Adds real value for time-sensitive data.	Requires rules /threshold engine plus push notifications or alerts.	TBD	P3	NA	Can tie FDH events!
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9	Non-Negotiable	Chat	Performance & Scalability: Must handle concurrent users (global finance teams), quick response, potential expansions.	Sluggish or error-prone solutions hamper user adoption. Finance data can be large & spiky.	Requires caching, load balancing, and possibly specialized hardware for LLM inference.	Pending (D) (300-500)	P1 is cu ss)	FDH + AI Agent + MA	NA		Higher latency poten
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10 (a)	Non - Negotiable	Chat	Feedback (P1) Classification (P2) & Continuous learning: user should be able to share feedback on AI responses, which can be used for reinforcement learning to improve the accuracy of responses over time.	Builds user trust if they see continuous improvement.	Requires mechanism to capture user feedback, store it securely, and feed it into an RL or supervised fine-tuning pipeline	YES (Disensus) (ways to share the feedback) to check team	P2 Classification to be done by F D H + AI			Feasible, but you must implement.
10 (b)	Non - Negotiable	Chat	Feedback (P1) Classification (P2) & Continuous learning: user should be able to share feedback on AI responses, which can be used for reinforcement learning to improve the accuracy of responses over time.	Builds user trust if they see continuous improvement.	Requires mechanism to capture user feedback, store it securely, and feed it into an RL or supervised fine-tuning pipeline	YES (Disensus) (ways to share the feedback) to check team	P2 Classification to be done by F D H + AI			Feedback classification
11	Non - Negotiable	Chat	Chat layout (side by side): Users should be able to view the report while chatting with the AI chatbot on web.	Without visibility to the report users would be unable to see the data they are looking to investigate	A side by side view would be critical for financial users to be able to chat with the AI agent	YES	P0			Currently My assistance challenges.

12	No - Negatable	Chat	V1: Static Suggested Prompts (July): user should be able to view and select some prompts specific to the report/dataset in the chatbot V2: Dynamic Suggested Prompts based out of user access (Aug) V3: Dynamic suggested prompts post Response (Post Aug)	These suggested prompts will be the starting point for a user to get to know how to interact with the bot for data questions.	User need not have to necessarily pick one out of the suggested prompts but can initiate a new question as well.	N.O. A s a pa rt o f m anife st fil e. ev er y ag en t ha s its o w n fil e. n ot fo r 8 /31 (D yn a mi c fo r M A, st ati c fo r F D H sp ec ifi c co nt ext)	P1	<p>Introducing Finance Assistant</p> <p>As your AI assistant, I can help you get started with your data analysis! 🎉</p> <p>Remember: Always verify the AI generated responses, prior to making business decisions or sharing.</p> <p>To get started, what would you like to know about Walmart Segment DST?</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Suggested prompts</p> <ul style="list-style-type: none"> Why is Walmart DST delayed today? > How many days has it been delayed this year? > How many KPIs do I have access to? > </div>	The Prompts should WMT DST additional
13.	Nice to Have	Chat	Feedback for chain of thoughts (explanation)- Design a feedback mechanism that allows users to comment on each distinct step of the answer retrieval.	The specific feedback helps pinpoint exactly where the system went wrong, so it can be improved.	This will help the AI learn better where the potential problem is and how it can be improved in future.	Di sc us s /b ac ki og	P3	NA	<p>Thinking</p> <ol style="list-style-type: none"> 1. Identify the category <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>What did I do</p> <p>I would like to</p> <p>Improve My</p> </div> <ol style="list-style-type: none"> 2. Determine greater than 3. Handle the have error 4. Filter the was high 5. Write the was high <p>Generating the</p> <pre>SELECT Category FROM data WHERE Year = 2023</pre>

14.	Non-negotiable	Chat	Expandable chat view for better visibility to visuals, feedback and suggested prompts. Magnified visuals for chat	An expandable chat view enhances focus and readability by maximizing screen space for conversations.	Efficiency and clarity-An expandable chat view significantly improves conversation clarity and user productivity.	Design (M&A will be back)	P2	NA. Not in scope for Labor-Day release.	Zoomed in view for tl
15.	Non-Negotiable	Chat	The chat should be able to support multiple visuals for the data analysis- Table, bar, line, waterfall, pie charts and geographical images.	use of different kinds of charts in the chat help users see and understand their data better, faster.	Integrating interactive, real-time, and customizable charts into chat enhances data understanding, collaboration, and analysis.	P2	convert images into Markdown or images		
16.	Non-Negotiable	Chat	Retain and display chat History for users to retrieve anytime in future- 100 days is what is displayed on UI for users Backend- 24 months by default	Retrieval of chat history provides context, reference, and efficient storage, search, and user control is essential for effective chat history retention.	user privacy, data security, and efficient storage, search, and user control is essential for effective chat history retention.	P1			Users should be able enabling knowledge Display Chat history
17.		Chat	Chain of Thoughts prompting			P3	NA		What is my YOY unit 1. Identify the relevant data points 2. Determine the comparison period 3. Handle the communication 4. Write the SQL query
18.			Increased session timeout window for FDH from 3 hours to 12 hours						

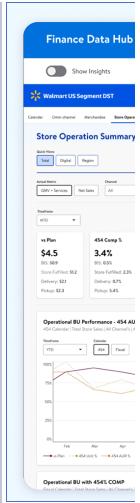
- FDH hosts several critical PowerBI reports used in recurring workflows like forecasting, planning, and business reviews.
 - **Issue:** Me@ currently enforces a hard 30-minute timeout, which breaks PowerBI session continuity. Users lose the state completely and can't resume even after refreshing — causing frustration and rework.
 - **Ask:**
 - End-to-end timeline feature (PowerBI allows support to 12 hours at a time).

- Allow users to resume the session at the same depth linking without resetting the experience.

19	Floating Chat icon-Finance Assistant Entry Point	<ul style="list-style-type: none"> We've integrated GenAI into FDH via MyAssistant. The current UX (text hyperlink) isn't prominent and gets missed. Issue: Guidance from Me@ has restricted floating UI components, which limits discoverability. Ask: <ul style="list-style-type: none"> enable a movable floating chat icon within FDH (just for them in a specific to ensure visibility and ease of use). 								28th May 2025	<p style="color: blue;">OPTION 2</p> <p>Floating action button</p>
20	Chat Window Resize (MyAssistant UX within FDH on Me@Campus)										

This document is private and confidential.)

- Issue: In the current implementation, the MyAssistant chat window is locked to 25% width and cannot be horizontally resized.
 - This restriction is severely limiting usability especially for number-heavy outputs like tables and week-over-week metrics comparisons.



21	<p>Post response suggested prompts</p> <p>After the chatbot returns a response, the system displays a set of context aware, pre-generated follow-up prompts that the user can click to dive deeper.</p>	<ul style="list-style-type: none"> ◦ On most finance platforms (14"), the view is clipped, requiring horizontal scrolling and breaking a ad a bit. • Ask: Attached screenshots show the current experience and a simple proposed fix: enable horizontal panel expansion of the chat panel to match content needs. 			<p>SAMPLE:</p> <p>Prompt: Show me WMT sales for Q2 broken down by location BUS?</p> <p>Response: A chart with summary.</p> <p>Post Response Suggested Prompts:</p> <ol style="list-style-type: none"> 1. Compare the sales with Q1? 2. Breakdown the sales by SBUs? 3. Show eCommerce vs In-Store sales? 4. Download as CSV/excel? 	

- Personalized suggestions based on user role or history
- Analyzes the intent and content of the prior response
- Generates 2-5 intelligent follow-up suggestions

- Improves user ability for less experienced users

- Adds a guide to the user

- Improves engagement

Chat Formats

Reference here for more details: [Chat Formats](#)

Format Type	Description	Current Capability	Target Enablement Date	Priority / Notes – Finance Product
Text Formats		Yes/No/Limited	Enabled/Date	
Lists (Bullet/Numbered)	Display bulleted or numbered lists	Yes		High – Essential for clarity
Paragraphs	Summaries, explanations, and narratives	Yes		High – Core content format
Tables	Structured data presentation	Yes (Markdown or as image)		Medium – Enhance dynamic table rendering
Step-by-Step Guides	Detailed instructions or process flows	Yes (how's this different from list?)		High – Critical for procedural clarity
Definitions	Explanations of terms and metrics	Yes		High – Needed for understanding
Q&A Format	Structured question and answer display	Yes (Markdown)		High – Core interaction format
Visual Formats (Charts & Graphs)				
Bar Charts	Compare different categories	Yes (as Image)		High – Essential for comparative analysis
Line Charts	Show trends over time	Yes (as Image)		High – Critical for time-series data
Waterfall Charts	Show how initial values change over time	Yes (as Image)		High – Useful for variance and trend analysis
Pie Charts/Donut Charts	Show proportions of a whole	Yes (as Image)		High – Key for proportion analysis

Geo Charts	Visually represents financial metrics or KPIs geographically			High - Essential for visualizing geographic or store-level performance
Scatter Plots	Display relationships between two variables	Yes (as Image)		Medium – Useful for correlation analysis
Heat Maps	Color-coded data visualization	Yes (as Image)		Medium – Enhances data visualization
Histograms	Visualize data distribution	Yes (as Image)		Medium – Useful for distribution analysis
Area Charts	Trend visualization with filled areas	Yes (as Image)		Medium – Alternative to line charts
Box Plots	Display statistical distribution (box-and-whisker)	Yes (as Image)		Low/Medium – Lower priority for finance insights
Radar Charts	Compare multiple metrics simultaneously	Yes (as Image)		Low – Niche use-case
Treemaps	Display hierarchical data	Yes (as Image)		Low – Niche use-case
Bubble Charts	Data points with a third variable represented by size	Yes (as Image)		Low – Less critical for finance
Additional Formats				
Interactive Dashboards	Real-time views combining multiple formats	No		Low – Future vision; currently not scoped

#	Chat Features	Timeline	
1	Context setting	P0	Jun
2	Context retention	P0	Jun
3	Explainability	P0	Jun
4	Chat Layout (side-by-side)	P0	Jun
5	Chat History (Finance GenAI)	P1	August– At risk
6	Performance & Scalability	P1	July
7	Suggested Prompts	P1	July
8	Interactive charts and tables (line, bar, pie, doughnut) with scroll	P2	Aug (pilot)
9	Magnified chat view for visuals	P2	Aug (pilot)
10	Feedback for FDH- categories and storage	P2	Aug
11	Support images on mobile	P1	Aug
12	Agent Switcher for orchestration boundary	P2	Oct
13	Draggable Chat frame for enhanced zoomed-in viewing	P2	Aug
14	Chat session active beyond 60 secs for MA	P2	Oct
15	Floating chat icon- Future iteration	P2	uncommitted
16	Post response dynamic suggested prompts	P2	uncommitted

	Nice to have asks after Demo on 7/25
1	While exporting to Excel, it would be helpful if the corresponding chart could also be included alongside the data.
2	Please explore options for exporting charts into PowerPoint in an editable format .
3	Instead of having chart labels appear only on click or hover, can we consider adding a toggle option to turn the labels on or off as needed?
4	Let the UX team come back with the complete flows as discussed—covering color changes, chart type selection, horizontal scroll bars for larger charts, and testing the chart's intuitiveness using a dragabble frame.

Roadmap (Indicative)

Discovery Phase Meeting Minutes

Date	Interviewee	Attendees	Meeting Notes	Document notes	Action Items
17 Feb 2025	Peter Kane	Peter Kane Taylor LeSueur Zachary Cederlof Venkata Chidiri - Vendor JIGAR JAIN - Vendor	Finance Chatbot Discovery-20250217_150221-Meeting Recording.mp4	Peter Kane GenAI Discovery 1-17.docx	
17 Feb 2025	Sam Phan	Taylor LeSueur Zachary Cederlof DHRUV KAMATH	Finance Chatbot Discovery-20250217_153447-Meeting Recording.mp4		
17 Feb 2025	Robby Rasmussen	Taylor LeSueur Zachary Cederlof DHRUV KAMATH @Preetha Ramachandran	Finance Chatbot Discovery-20250217_153447-Meeting Recording.mp4		
18 Feb 2025	Blake Bethea	Taylor LeSueur Venkata Chidiri - Vendor JIGAR JAIN - Vendor	Blake-Bethea-GenAI-Discovery.mp4	Blake Bethea GenAI Discovery 2-21.docx	
18 Feb 2025	Haley and Sara	Taylor LeSueur Venkata Chidiri - Vendor@sonia kandalkar@Zachary Cederlof	Finance Chatbot Discovery-20250219_130200-Meeting Recording.mp4	Haley and Sara GenAI Discovery 2-19-.docx	
18 Feb 2025	Taylor Avery/Clyton Wofford	Taylor LeSueur JIGAR JAIN - Vendor Venkata Chidiri - Vendor	Finance Chatbot Discovery-20250218_160342-Meeting Recording.mp4	Taylor Avery, Clayton Wofford GenAI Discovery 2-18.docx	
18 Feb 2025	Nicholas			Nicholas Cogan GenAI Discovery 2-19.docx	
18 Feb 2025	Natalie			Natalie Craig GenAI Discovery 2-19.docx	
18 Feb 2025	Mauri	Taylor LeSueur Venkata Chidiri - Vendor Zachary Cederlof	Finance Chatbot Discovery-20250219_160245-Meeting Recording.mp4	Mauri Myers GenAI Discovery 2-19.docx	

Reports Usage and Concurrency:

Dataset	Reports	# of users	Concurrency
WMT Sales + Txns	WMT DST	404	17-21
SAP Monthly	CP P&L	481	5-7
Sams Sales + Txns	Sams DST	484	17-21
	Intl DST	286	6-8
	Rainbow P&L	183	7-9
SAP Monthly	Corp P&L	567	18-20
	Consolidated DST	137	5-7

4iTB Signoffs

Department	Date	Name of person signing off	Approval Attachment
Business			
Engineering			
Product			
Program			

Controllership Knowledge Management

Groundtruth Doc - [Controllership KM Groundtruth.docx](#)

PRD - [Archimedes PPRD.docx](#)

PRD ppt - [Archimedes.pptx](#)

User Stories - [Controllership KM User Stories.xlsx](#)