Simple Front-End UI Design

Financial Analyst RAG

ID: 238482

Login

Enter your credentials to access the RAG system

Employee ID

Enter your employee ID

Password

Enter your password

Two-Factor Authentication

Enter 2FA code

Log In

NOTES:
The login screen features a clean, minimalist interface for the Financial Analyst RAG system.

It enhances security, prevents malicious injections, and enables customization based on each financial analyst's coverage areas, writing style, and analytical approach.

2. Upload Documents

FinAnalyst RAG

Upload Document

Local File	Google Drive

Upload File(s)

Choose Files No file chosen

You can select multiple files for upload.

Upload and Process

NOTES:
This document upload interface comes with two options: Local File and Google Drive integration.

The interface maintains consistency with the system's header elements and presents a clean, uncluttered workspace for document management.

The user benefits from several features: the ability to select multiple files, clear indication of file selection status ("No file chosen"), and a prominent "Upload and Process" button. The interface also includes guidance text ("You can select multiple files for upload") to assist users.

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ID: 238482 ☼

Processing Document

Please wait while we analyze the document using RAG…

33%

Chunking…

Processing Steps:

- ~~Document validation - Verifying the document meets security and compliance requirements~~
- ~~Document extraction - Converting the raw file into processable text while preserving metadata~~
- ~~Text preprocessing - Cleaning and standardizing the text content~~
- Chunking - Splitting the document into appropriate segments
- Embedding generation - Converting text chunks into vector representations
- Metadata enhancement - Adding contextual information to each chunk
- Vector storage - Indexing and storing embeddings with metadata in the vector database
- Validation - Verifying successful ingestion and retrievability

Progress by each file

- Travelers (TRV) 10K 2024 report ▬▬▬ 35%
- Progressive (PRG) 10K 2024 report ▬▬ 30%
- Chubb (CB) 10K 2024 report ▬▬▬ 36%
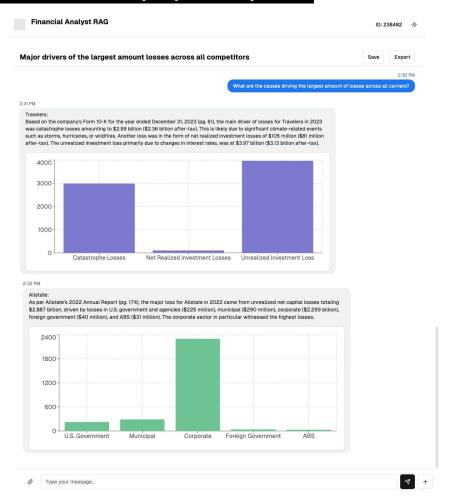- Allstate (ALL) 10K 2024 report ▬▬▬ 40%

NOTES:
The processing screen offers a transparent view of the document analysis workflow, featuring a progress bar, detailed processing steps, and individual file progress tracking.

This screen provides: the progress indication (e.g. 33% complete with visual bar), a breakdown of processing steps with strikethrough for completed tasks, and individual progress bars for each file being processed.

The detailed status updates ("Chunking...") and comprehensive processing steps list help users understand the system's operations and maintain confidence in the process.

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Major drivers of the largest amount losses across all competitors　　Save　Export

2:30 PM

What are the causes driving the largest amount of losses across all carriers?

2:31 PM

Travelers:
Based on the company's Form 10-K for the year ended December 31, 2023 (pg. 61), the main driver of losses for Travelers in 2023 was catastrophe losses amounting to $2.99 billion ($2.36 billion after-tax). This is likely due to significant climate-related events such as storms, hurricanes, or wildfires. Another loss was in the form of net realized investment losses of $105 million ($81 million after-tax). The unrealized investment loss primarily due to changes in interest rates, was at $3.97 billion ($3.13 billion after-tax).

2:32 PM

Allstate:
As per Allstate's 2022 Annual Report (pg. 174), the major loss for Allstate in 2022 came from unrealized net capital losses totaling $2.887 billion, driven by losses in U.S. government and agencies ($225 million), municipal ($290 million), corporate ($2.299 billion), foreign government ($40 million), and ABS ($31 million). The corporate sector in particular witnessed the highest losses.

Type your message…

NOTES:
The chat interface helps users with querying and analyzing document content. It features a conversation area with time stamps, data visualizations, and an input area at the bottom for users to enter the new message. Alternatively, user can start a new chat. The screen includes options to save and export conversations.

The user experience is enhanced through several features: visual separation between queries and responses, integrated data visualizations with supporting context, and organized presentation of complex financial data.

The ability to save and export conversations demonstrates consideration for users' needs to preserve and share their analyses. The charts and graphs are formatted with clear labeling and appropriate use of color to distinguish different data points.