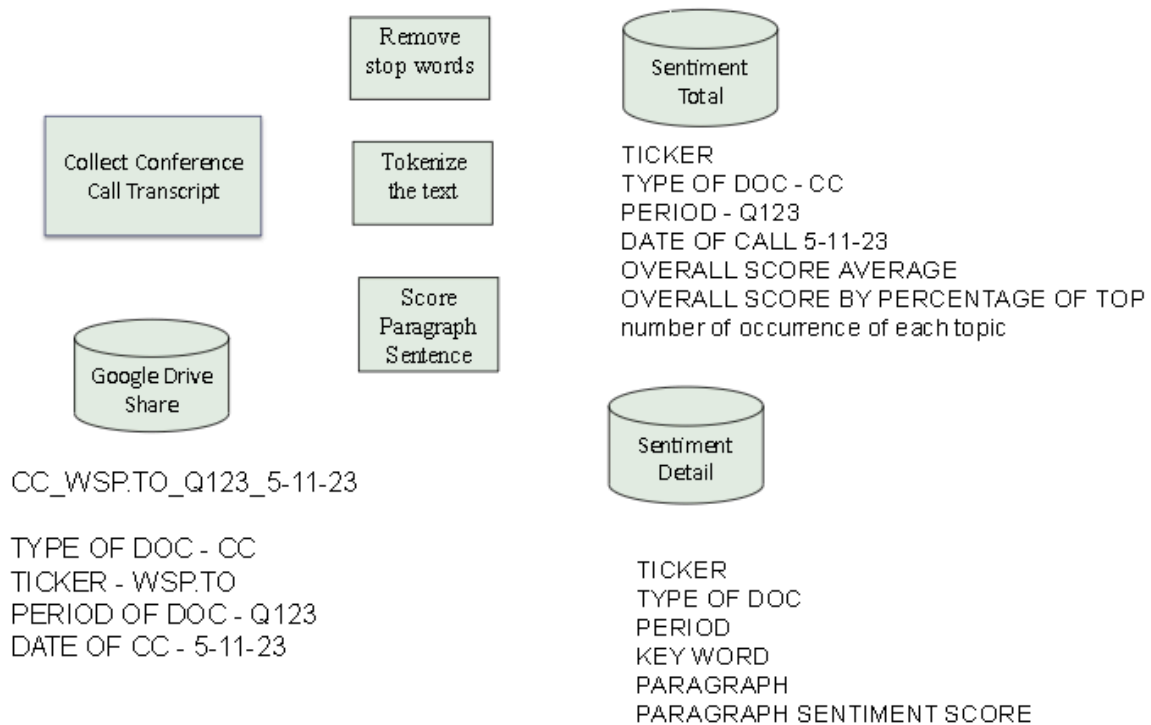


Sentiment Process Flow



We need the layout of the 4 tables.

1. Sentiment Detail table
2. Summary table
3. Company table
4. Topics table.

Company info table that holds all stocks we are looking at
send daily price code to bruno tickers are wrong

Pull document

Store it in format that can be searched and retrieved text file on cloud
storage - naming convention eg WBS_NEWS_2-14-25-12:30

Score document and store by ticker date/time type article number if pulling more than one story
couter

Use C US

For example GO to API and pull historical call for Q22023

Store that data on cloud storage

Access key word table datastore

Access company info table

Leverage sector from company info table

Search document for key works from sector

Score and store each paragraph of entire earnings call

Run code that will summarize the scores for that call.

using those
run thur code

Python CRUD needs to be understood

Send out docs again - highlight charlies

App engine

1. Company Info - Set up new company info table
2. Good to practice on your own project leveraging Python CRUD example

Andrew

Keyword entry

Same as company info - need to have front end to load keywords into table

Datastore organization - need to understand and document all datastore tables and identify which ones are used in live app engine code need fields- William

Daily prices - use yahoo API to build in cron job that scans company info table and loads prices daily. Bruno team - **Devarshee Roy**

Need to back fill prices

Angello/Joe

Datastore

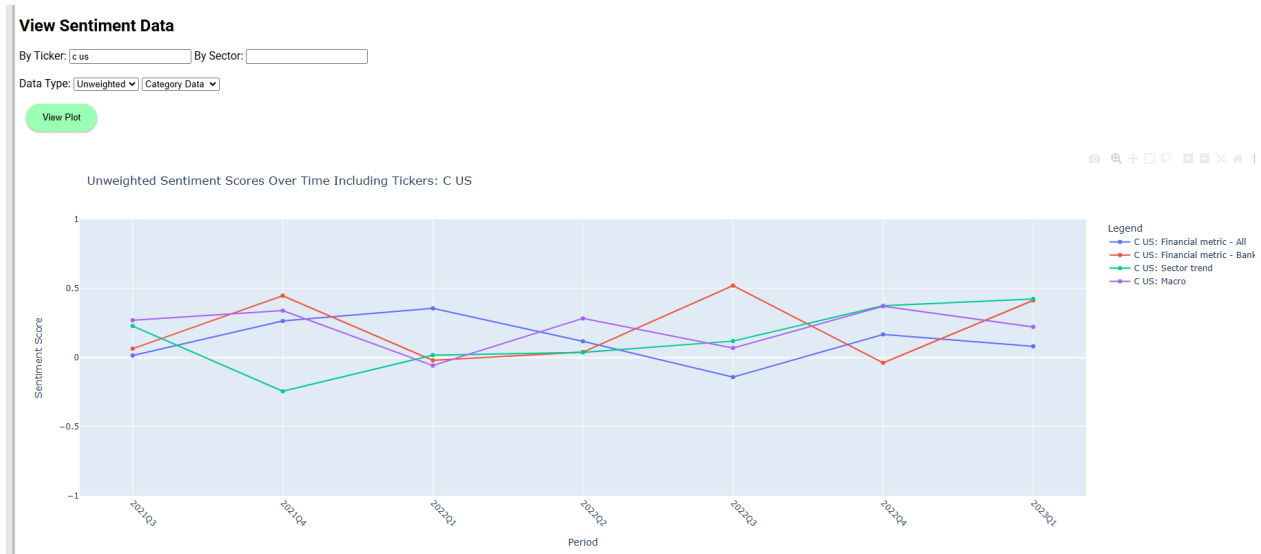
Cloud Storage

Compute engine

1. Need to allow other projects to access the resources in sentiment analysis project
2. Need to be able to export data in datastore table to a cloud storage bucket as a csv or comma delimited file

Graph - Nazmus / Akhil

Work on one graph which takes the sentiment summary table and plots it



Earnings call

API - GET CALL

Store entire call on cloud storage identified by quarter, year, ticker and date of call

Score thru model on compute engine

Summarize

Plot

To do

Future state

How to train model

Identify entities

Machine learning

Category	Task	Priority	Description	Status
Application front end	Company Info Table	high	Flask process to store data in Company Info	Rebuild code in new project
	Company Data	low	Load companies into Company Info table custom key	
Application front end	Topics Table	high	Flask process to store data in Topics	
	Load Topics	high	Load all keywords, classifications, sector and importance into table	
	Graph Average Scores	high	Graph to plot average scores for one company over periods selected	
	Graph to plot average scores for sector		Graph to plot the average scores for each company in a selected sector for a selected period	
	Sentiment scoring		Program to take a conference call, identify each paragraph where a keyword appears, store the paragraph keyword and a sentiment score for that paragraph	PARSING PROCESS
	Sentiment score loading	low	Need load program to load existing scored data into sentiment detail table.	

	Sentiment Detail		Program to take a scored conference call and summary each classification by average score, weighted score and number of times keyword is mentioned	
	Sentiment Total	high	Need to be able to summarize scoring detail into total table to drive graphs	
Data loads	Load conference calls	high	Flask to upload CC transcripts and execute scoring module	pull cc from capital IQ
	Daily prices	high	Process to get all prices for current day based upon companyinfo table	Yahoo API'S for prices. daily prices bucket, check instance for code. cron
	Historical prices	low	Back fill prices of companies on table	
	Load Topics	med	Load all keywords, classifications, sector and importance into table	
	Load Companies	med	Batch program to load companies to Company Info table custom key	
	Load exiting scores	low	Need load program to load existing scored data into sentiment detail table. Program needs to add Ticker	NEED OLD DATA

Environment Setup	Linux	high	https://cloud.google.com/python/docs/getting-started/getting-started-on-compute-engine	
			Prepare for Python	
			access table from other project	
	login interface		security setup	
	Test environment		SETTING UP NEW PROJECT	
	branding UCONN			
	Earnings call load	high	Get SSGA cc MSFT call scored	
	load companies	high	MSFT, NOW, CRM, ADBE, ORCL and INTU.	
	Add keywords	high	Key words: - AI - Monetization of AI - LLM - Training of LLM - GPU - AI software functionality	