

BlueML 1.4.0 Release Webinar

Release Timing

- **Blue 1.4.0 Released: September 21, 2021**

Release Highlights

- New Homepage Design
- Customize Variable-Definition pairs
- Build topic structure with Views
- Drill-down by topic or sub-topic
- Add and remove Dashboard Widgets
- View Unique Commenter ID
- Student Learning Categorization (SLC) model*
- Emotions Model*

*In Beta testing; available on demand. Contact your Account Manager for details.

Increased Usability

- New Homepage Design
- Streamlined Analysis/User List
- Enhanced Dashboard Features
- Build your own topic structure with Views

UI Enhancements: Homepage

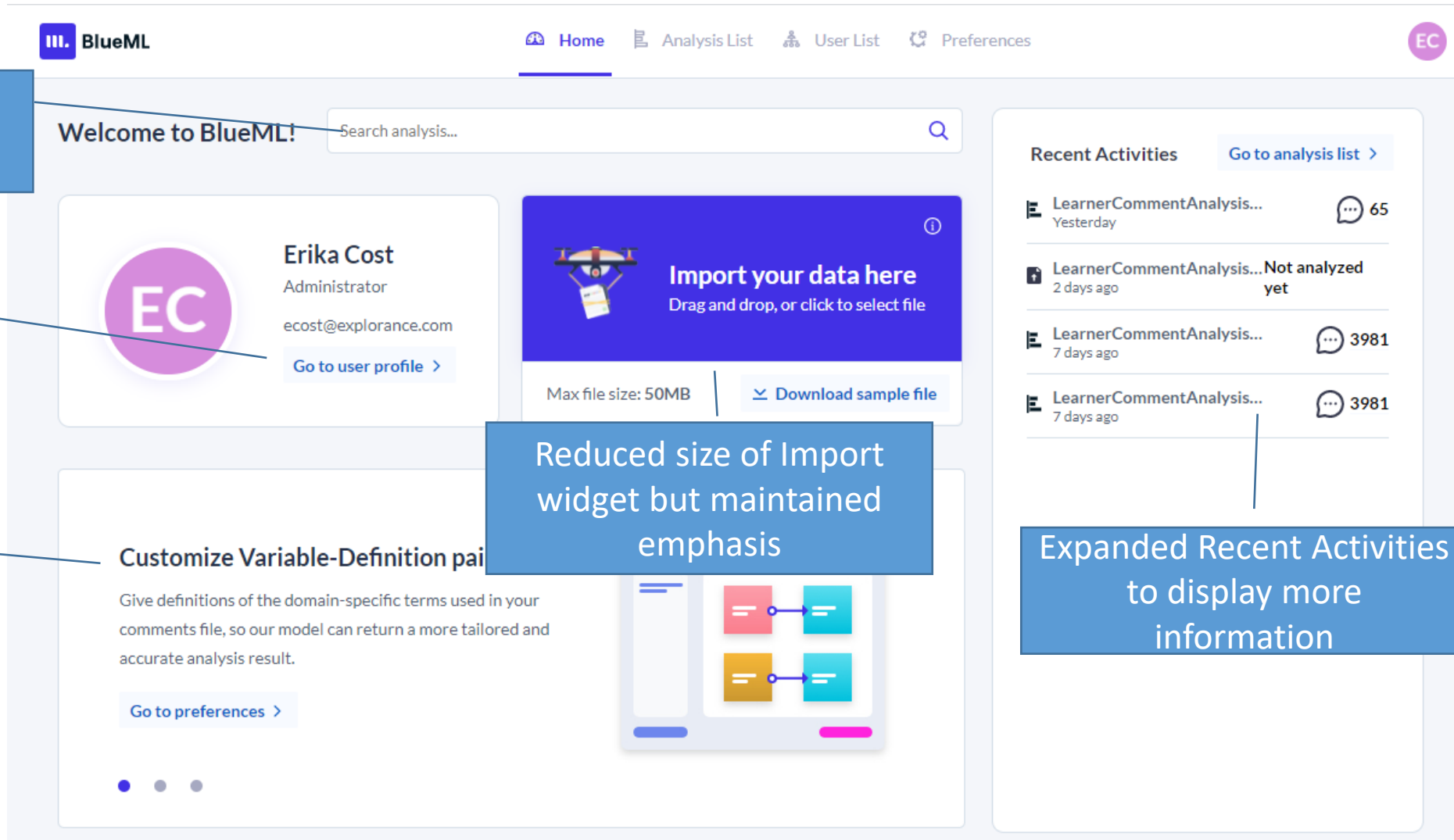
New Search bar to easily find Analyses

Access to User Profile

Most recent release features highlighted

Reduced size of Import widget but maintained emphasis

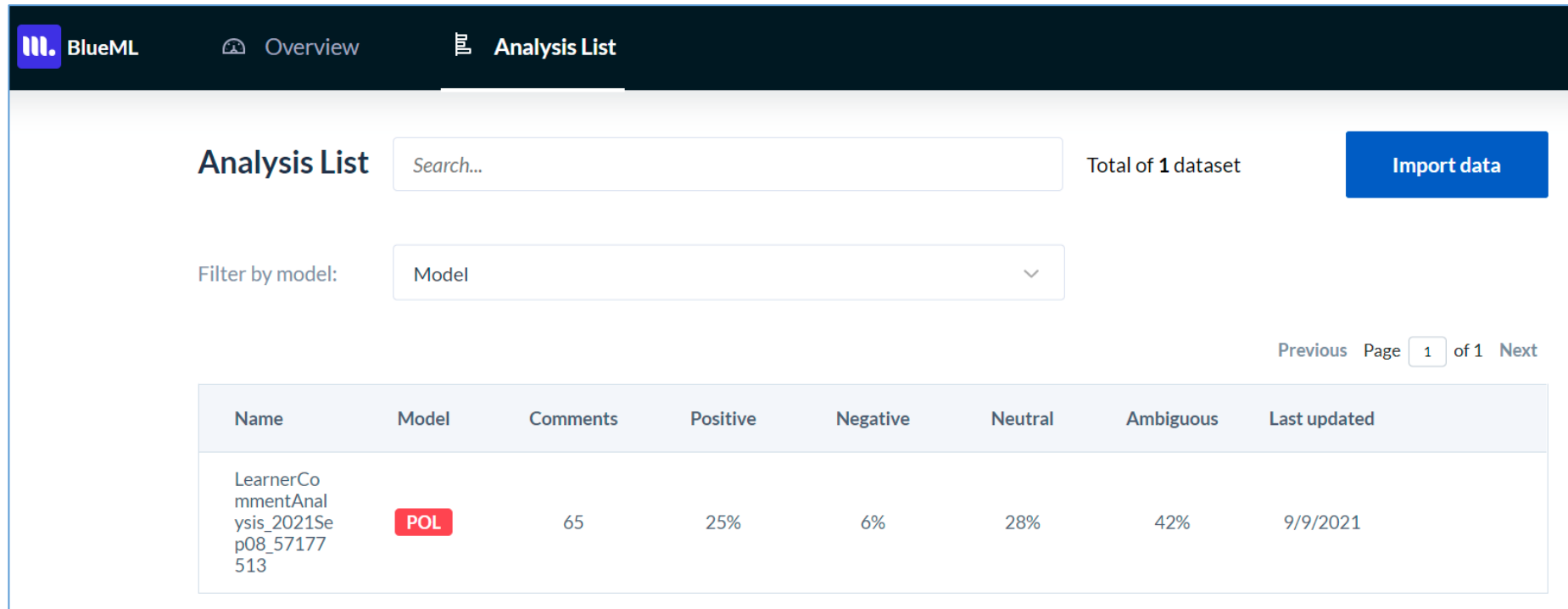
Expanded Recent Activities to display more information



UI Enhancements: Analysis/User List

Streamlined the interface for User and Analysis Lists

BlueML 1.3.0

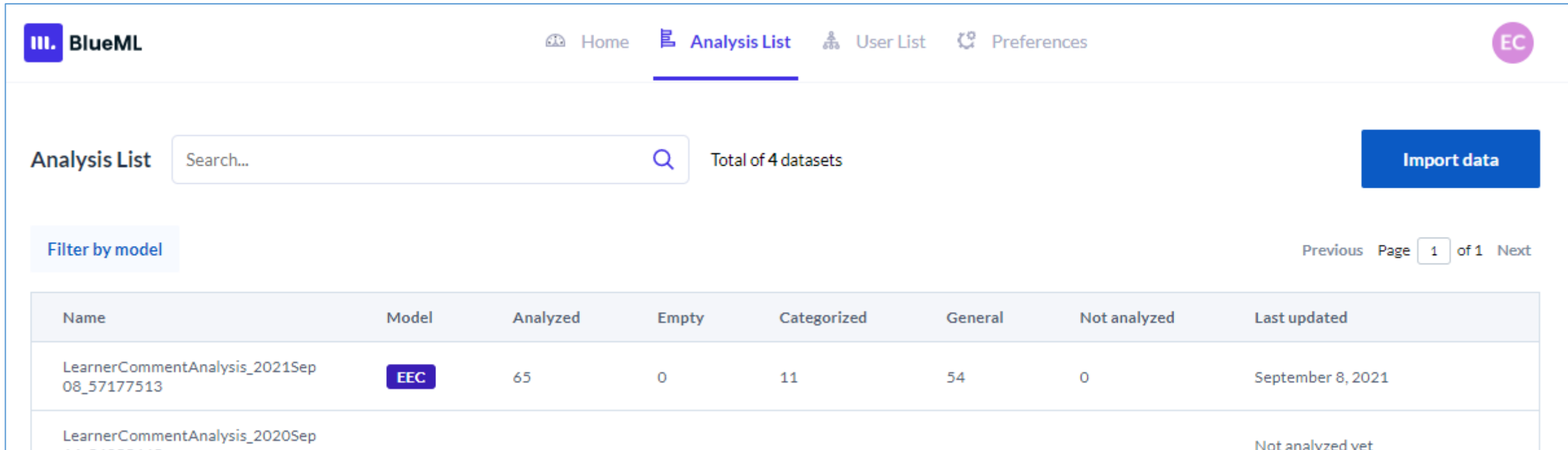


The screenshot shows the BlueML interface for the Analysis List. At the top, there are navigation tabs for 'Overview' and 'Analysis List'. Below the navigation, there is a search bar labeled 'Search...' and a button 'Import data'. A filter dropdown is labeled 'Filter by model:' and currently shows 'Model'. Below the filter, there is a pagination control showing 'Page 1 of 1'. The main content is a table with the following data:

Name	Model	Comments	Positive	Negative	Neutral	Ambiguous	Last updated
LearnerCommentAnalysis_2021Sep08_57177513	POL	65	25%	6%	28%	42%	9/9/2021

UI Enhancements: Analysis/User List

BlueML 1.4.0




The screenshot shows the BlueML web interface for the 'Analysis List' page. At the top, there is a navigation bar with 'Home', 'Analysis List' (active), 'User List', and 'Preferences'. A search bar is present with the text 'Search...' and a magnifying glass icon. To the right of the search bar, it says 'Total of 4 datasets'. There is an 'Import data' button on the right side. Below the search bar, there is a 'Filter by model' button. On the right side, there is a pagination control showing 'Previous', 'Page 1 of 1', and 'Next'. The main content is a table with the following data:

Name	Model	Analyzed	Empty	Categorized	General	Not analyzed	Last updated
LearnerCommentAnalysis_2021Sep 08_57177513	EEC	65	0	11	54	0	September 8, 2021
LearnerCommentAnalysis_2020Sep 11_51255115							Not analyzed yet

UI Enhancements: Dashboard

- **BlueML Dashboard and Data Exploration View merged to avoid confusion and provide a more streamlined experience**
- **Overall stats as its own stand-alone Widget**
- **New View All option for each Widget**
 - Displays previous Data Exploration functionality

UI Enhancements: Dashboard



Overall stats

Total of 710 commenters [View all](#)

Topic view:

ELC Employee Learning Categorization

Comments: **1702**

Positive **37%**

Negative **26%**

Neutral **0%**

Ambiguous **36%**

Recommendations **691**

Dashboard > Topic View

ELC Add filters

Topics	Comments	Positive	Negative	Neutral	Ambiguous	Recommendations	Sentiments
- Training content and delivery	1267	517	540	3	709	855	40%
- Training content/concept	327	151	51	3	175	69	46%
+ Other / General	148	0	14	0	134	0	91%
+ Relevance	58	36	9	0	13	10	62%
+ Quality	41	38	0	3	0	0	93%



























Clicking View All in a Widget opens Data Exploration view

UI Enhancements: Drill-Down

Drill-down enhanced to include multiple levels in the same view for easier and more flexible analysis

Dashboard > Topic View

 ELC 

Topics	Comments 	Positive	Negative	Neutral	Ambiguous	Recommendations	Sentiments 
 Training content and delivery	1267	517	540	3	709	0	 40% 
 Learning outcomes	250	149	19	0	108	0	 54% 
 Other element	220	159	54	6	37	0	 62% 
 Relevance	63	38	9	0	16	7	 60% 
 Quality	50	38	6	6	0	2	 76% 
 Helpfulness & support	38	38	0	0	0	0	 100% 
 Engagement/interest level	22	6	0	0	16	11	 73% 
 Other / General	20	0	20	0	0	12	 100% 

UI Enhancements: Dashboard

- Breadcrumbs added to facilitate navigation
- Current location underlined and colored to highlight work flow
- Ability to switch Topic View
- Ability to Add Filters

The screenshot shows a navigation breadcrumb trail: **Dashboard > Topic View > Comments**. The word "Comments" is underlined and colored blue. A callout box labeled "Breadcrumbs" points to this trail. Below the breadcrumb is a control bar with a dropdown menu labeled "ELC" and a button labeled "Add filters". A callout box labeled "Switch Topic View and/or Add Filters" points to these controls. Below the control bar is a summary row with the following data:

Comments: 1267	Positive: 29%	Negative: 31%	Neutral: 0%	Ambiguous: 40%	Recommendations: 624
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A callout box labeled "Underlined and highlighted to indicate what you're currently viewing" points to the "Comments: 1267" data point.

UI Enhancements: Dashboard

- Optionally view Categorization of Comments, color-coded to indicate sentiment
- View comments by sentiment or recommendations

The screenshot displays the 'Comments' section of the Explorance dashboard. At the top, there are navigation links for 'Dashboard', 'Topic View', and 'Comments'. Below this, a filter bar shows 'ELC' and an 'Add filters' button. A summary row displays the following data: Comments: 1267, Positive: 29%, Negative: 31%, Neutral: 0%, Ambiguous: 40%, and Recommendations: 624. A search bar is present with the text 'Search for keywords, connect them with "OR" or "|"...' and a search icon. Below the search bar, there are three example comment snippets. The first snippet is 'I enjoyed the virtual breakout sessions that allowed for smaller groups' with a green 'Agreableness' tag. The second snippet is 'The program felt rushed (which is understandable considering people schedules).' with a red 'Other attribute' tag. The third snippet is 'The technology worked but a number of attendees didnt participate in the group sessions and this led to minimal interaction.' with multiple tags including 'Quality', 'Engagement/interest level', and 'Team - fairness'. A blue callout box with the text 'Click one of the sentiment classifications to isolate to just those comments' points to the 'Negative' classification in the summary row. Another blue callout box with the text 'Select Show categorized topics to view the categorization and color-coded sentiment' points to the 'Show categorized topics' checkbox and the tags on the comment snippets. A third blue callout box with the text 'Search for keywords, connect them with "OR" or "|"...' points to the search bar. A fourth blue callout box with the text '382 out of 1267 comments' points to the search results count. A fifth blue callout box with the text 'Show categorized topics' points to the checkbox. A sixth blue callout box with the text 'Show categorized topics' points to the 'Show categorized topics' checkbox in the search results area.

Add/Delete Widgets

Topic view: EEC Employee Experience Categorization

Comments: 11 (Positive: 27%, Negative: 45%, Neutral: 0%, Ambiguous: 27%, Recommendations: 6)

Most popular topics

No filters applied [View all](#)

- Job-work Training & Career Development (43%) (7)
- Job-work Resources & Tools (50%) (4)

Most positive topics

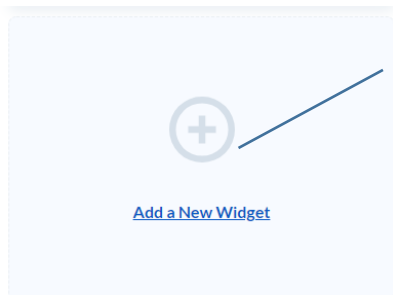
No filters applied [View all](#)

- Job-work Training & Career Development (43%) (7)
- Job-work Resources & Tools (50%) (4)

What to improve

No filters applied [View all](#)

- Job-work Resources & Tools (25%) (4)
- Job-work Training & Career Development (29%) (7)



Select to Add a new Widget. Allows for convenient comparisons between differently filtered Widgets

Widget settings

Type: Most positive topics | Title: Most positive topics

Stats: Comment count, Dominant sentiment, Recommendations

Topic views: EEC

Filters: Threshold: []

Select a field you want to use as a filter: Topics

[Remove this widget](#) [Cancel](#) [Save](#)

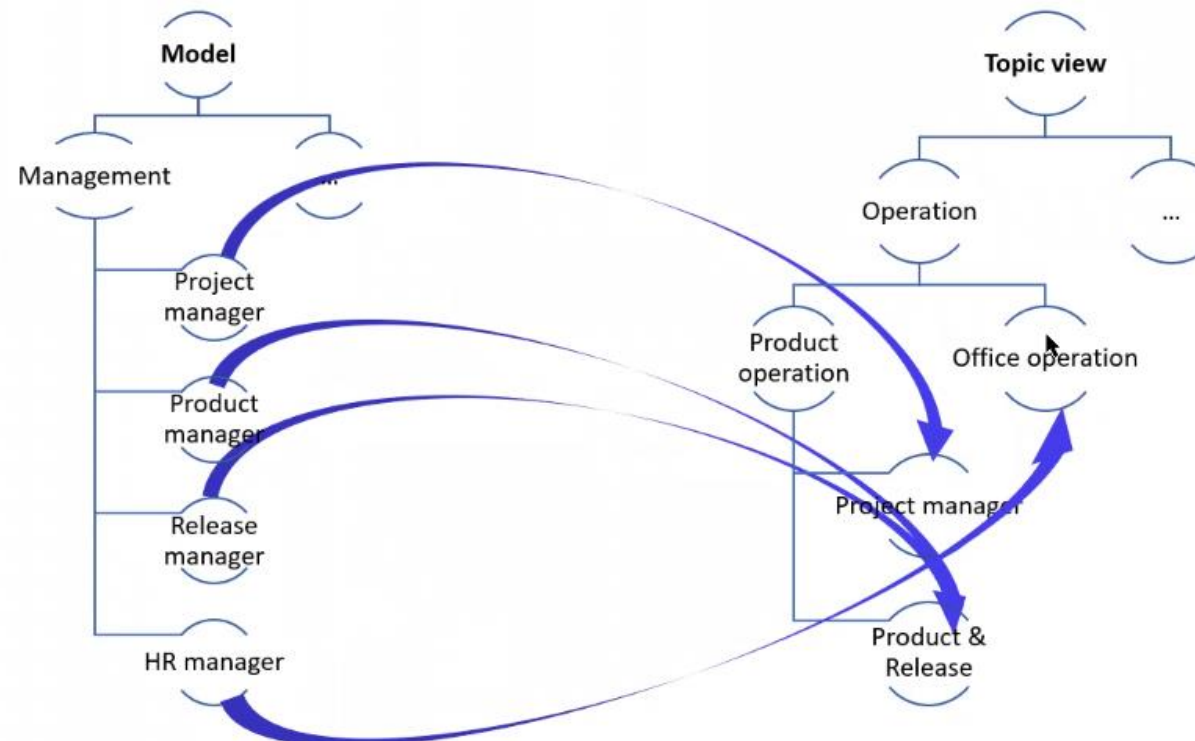
Delete Widget from within Widget Settings

Build Customized Topic Structure with Views

- **Users can create their own structure using Topic Views**
- **Allows customization of the model's static topic categorization to better align with organizational/institutional structure and KPIs**
- **Only available with Categorization Models**
 - **Not available for Polarity, Recommendation, and Emotions (in BETA) Models (these don't have Categorizations)**

Build Customized Topic Structure with Views

- Choose the Model
- Build your structure
- Map the existing topics to the desired location in your new structure



Build Customized Topic Structure with Views

Build your new Topic Structure with Topics and Subtopics

Name:

Customize your own topic structure Map topics Add subtopic Add topic

Topic views allow you to customize a model and rearrange topics to better fit your needs.

- Onboarding
 - + Compliance
 - + Delivery
 - Culture
 - + Connection

Select the new term that needs to be mapped, then select the original model topics to customize how that term will be categorized in the model

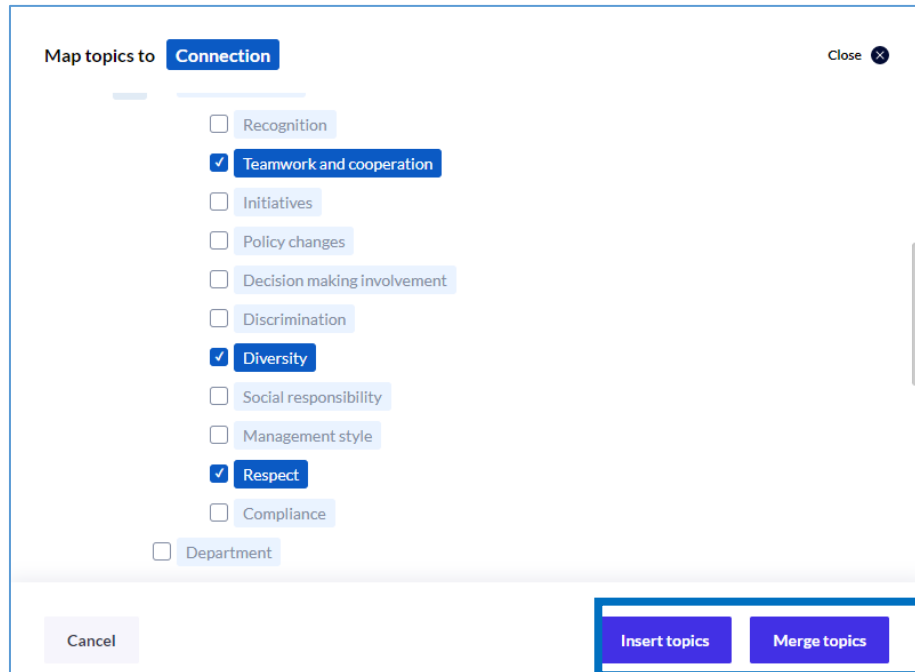
Map topics to **Connection** Close

- Recognition
- Teamwork and cooperation**
- Initiatives
- Policy changes
- Decision making involvement
- Discrimination
- Diversity**
- Social responsibility
- Management style
- Respect**
- Compliance
- Department

Cancel Insert topics Merge topics

Comments categorized under Organization > Culture/values > Teamwork and cooperation, Diversity, and Respect will now be categorized under the new "Connection" topic pathway

Build Customized Topic Structure with Views



Two ways to map:

- Insert topics = inserts the selected topics as child items under the new term but displays the individual items selected (structure is maintained/displayed) Ex: Onboarding > Culture > Connection > Teamwork and Cooperation
- Merge topics = Original topic items won't display; everything gets categorized under "Connection"

Build Customized Topic Structure with Views

New Topic View can be applied to the Dashboard Overall Stats

Topic view: EEC Employee Experience Categorization

Comments: 11 Positive 27% Negative 45%

Most positive topics

Topic	Positive %	Comment Count
Job-work Training & Career Development	43%	7
Job-work Resources & Tools	50%	4

Widget settings

Type: Most popular topics

Title: Most popular topics

Stats:

- Comment count
- Dominant sentiment
- Recommendations

Topic views: EEC

Select a field you want to use as a filter:

- Topics

Remove this widget | Save

Individual Widgets can be filtered to a Topic View

Build Customized Topic Structure with Views

Notes:

- **One View can only be connected to one model**
- **Users can create as many Views as needed**
- **Views can be named/re-named as needed**
- **Not all topics in the model need to be used; the new Topic can use a sub-set**

New Insights

- Customize Variable-Definition Pairs
- Unique Commenter ID
- Student Learning Categorization (SLC) Model*
- Emotions Model*

*In Beta

Customize Variable-Definition Pairs

- **Users can create their own Variable-Definition pairs to accommodate for institutional/organizational-specific terminology**
 - Ex: “PM” could stand for Project Manager, Product Manager, Program Manager, Prime Minister, etc.
- **Allows for more accurate categorization and analysis**
- **Variable = the term/terminology that exists in the Comments file**
- **Definition = the term/terminology that you want the model to use**

Customize Variable-Definition Pairs

Create your Variable file, including Variables and Definitions

Select to apply the Variable file to your Analysis

The screenshot shows the 'Variable mappings' section of the Explorance interface. On the left, there is a 'List of variable presets' with 'Explorance 2021' selected. Below it is a 'New mapping set' button. The main area shows the 'Variable preset name' as 'Explorance 2021'. A table below lists 'Group variable' and 'Definition' pairs:

Group variable	Definition
PM	Product Manager
CSM	Customer Success Manager
PS	Professional Services

The screenshot shows the 'Analysis settings' dialog box. The 'Model' is set to 'ELC Employee Learning Categorization'. The 'Commenters ID' is set to 'None'. The 'Variable mapping preset' dropdown is open, showing 'Explorance 2021' as the selected option. Other options include 'None' and 'New mapping set'.

Customize Variable-Definition Pairs

Notes:

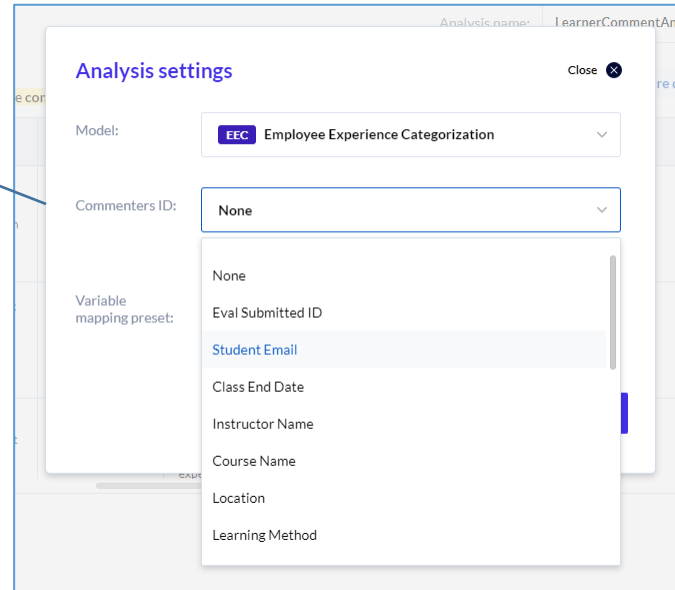
- **User can create an unlimited number of files**
- **Limit for the Group variable field is 100 characters**
- **Variables cannot be duplicated in the same file; an error will result**
- **Only one Variable/mapping file can be applied to an analysis**
- **Dashboards will display the original text, not the provided Definition**
 - **Definition is used for the analytical model only**
- **Mapping files cannot currently be imported (future enhancement)**

Unique Commenter ID

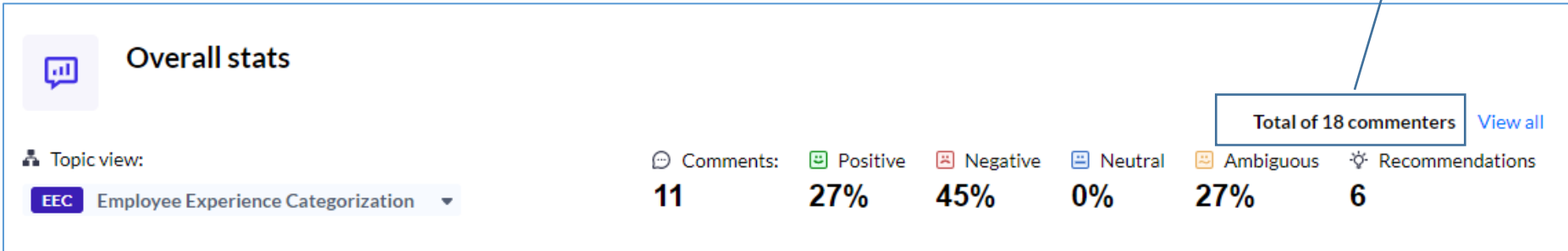
- **View number of unique commenters, in addition to total number of comments**
- **Helps to provide a measure of reliability**
 - **Ex: How many individuals provided the negative comments? Were they all from just one individual?**

Unique Commenter ID

Select the correct Commenter ID from the data set that will be analyzed



BlueML provides the number of unique commenters



New Models in Beta

Student Learning Categorization (SLC)

- Categorize student evaluation of a course at a Higher Education institution into themes, categories, attributes, and sentiments
- 7 themes, with sets of categories and sub-categories
 - Course components
 - Learning environments
 - Learning outcomes
 - Miscellaneous
 - Other elements
 - Persons
 - Teaching components

Emotions

- Applied to comments of any origin
- Obtain insights into emotions expressed
- Currently 7 emotion types can be detected:
 - Joy
 - Sadness
 - Guilt
 - Shame
 - Fear
 - Anger
 - Disgust

Questions?

THANK YOU



www.explorance.com