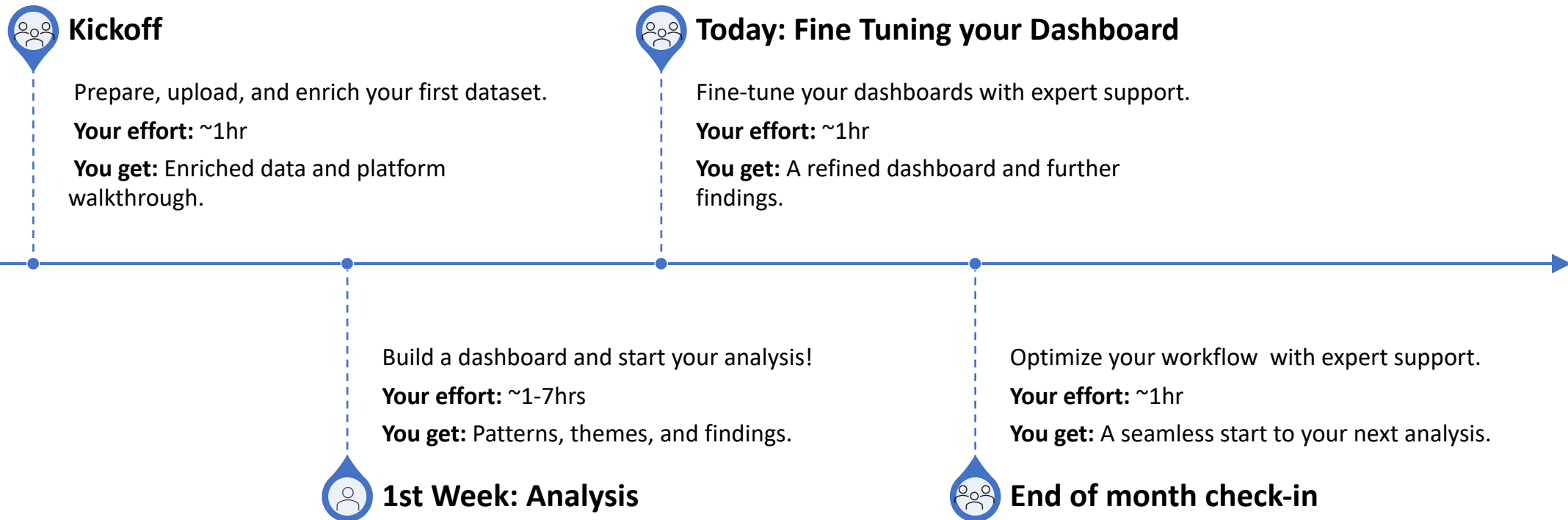




Dashboarding Session

The Process



Dashboarding Outline



1. The Stage screen:
 - Creating reports
 - Creating widgets
2. How to explore your data in the Stage
3. Collaborate with GenAI

Visualizing Results – Control Overview

1. Visualize results in the Stage



2. Loading the dataset to review

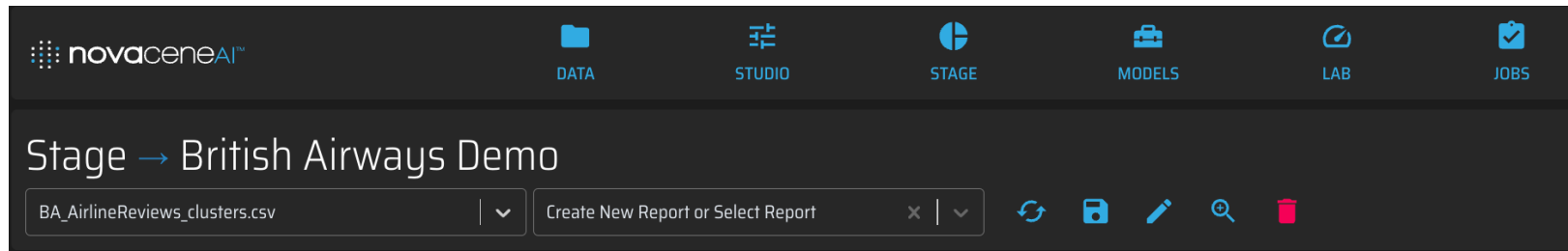
3. Saving and loading reports

4. Adding, removing and laying out widgets



Create a Report - Stage

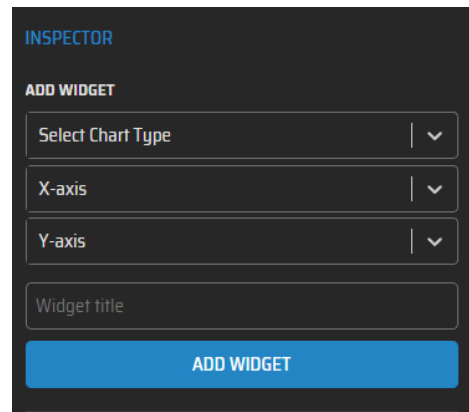
1. In the Stage, pick the file you'd like to use with the leftmost dropdown.
2. Under "Create New Report or Select Report", start by typing a name for your report.



3. When making changes to your report, remember to hit the "Save" button to keep your changes.

Create and Delete Widgets

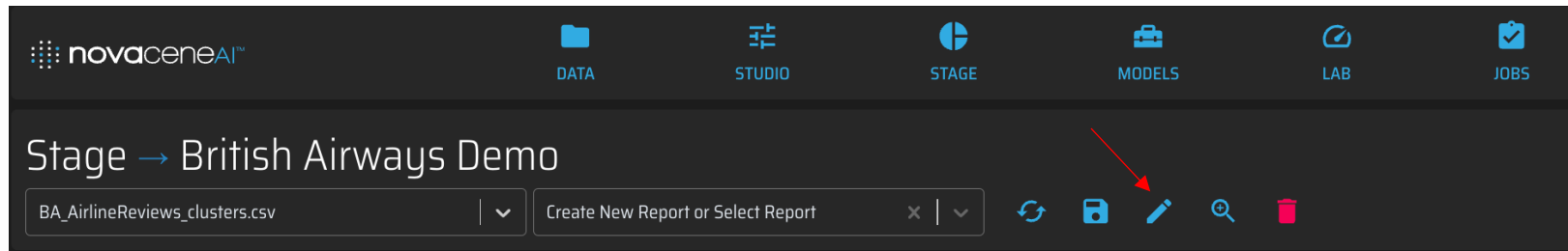
1. The application will automatically generate some visualizations. Some may not be needed. Use the little red trash can at the corner of the widget to delete unwanted widgets.
2. You can create your own widgets. From the Inspector window on the right-hand side, use the Select Chart Type drop-down to choose a chart type for to use.
3. Subsequently, select the desired X-axis Y-axis and Widget title. Once the Add Widget button is clicked, the chart will be displayed in the main Stage. More detail on chart types can be found in the manual.




The image shows a dark-themed 'INSPECTOR' window. At the top, the word 'INSPECTOR' is written in blue. Below it, the text 'ADD WIDGET' is displayed in white. There are three dropdown menus: 'Select Chart Type', 'X-axis', and 'Y-axis', each with a white arrow pointing down. Below these is a text input field labeled 'Widget title'. At the bottom of the window is a prominent blue button with the white text 'ADD WIDGET'.

Move and resize widgets

Use the “Edit” button to move and resize widgets. You can drag and drop widgets to their desired location, or click and drag the corners to resize widgets. Remember to press the save button to keep your changes.



Filtering and Asking Questions



Once you're happy with your dashboard, you can click on different elements in the widgets to explore your data. You can answer questions like:

What are the themes in my data?

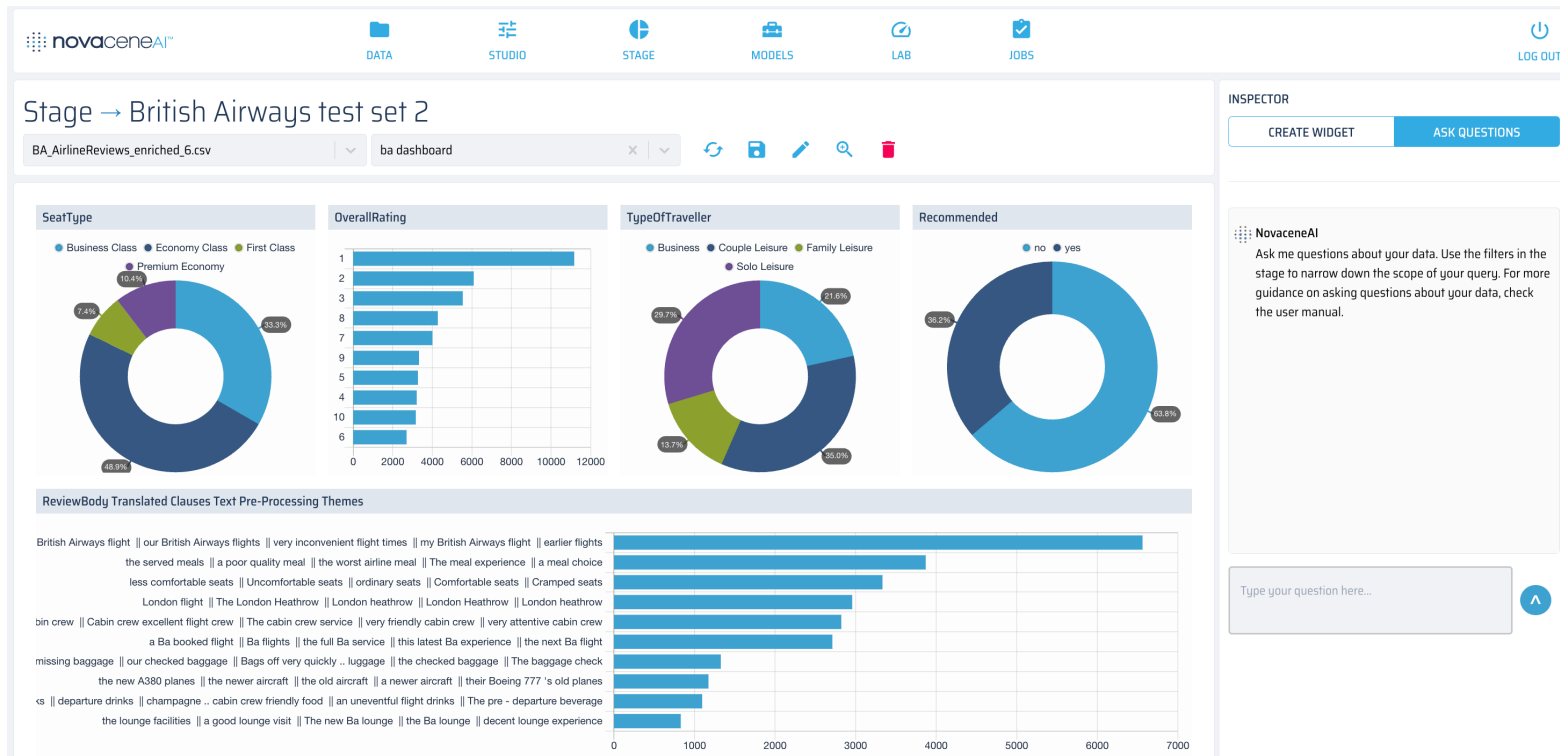
What is the sentiment towards these themes?

You can also use the structured fields in your data to answer other questions of your data. For example, if your data has demographic information, you can approach with the question: "What does X demographic think about this theme?"

You can add filters by clicking on widgets, and remove them by pressing the x next to the filter in the inspector.

Q&A with your Data

Our new Q&A feature lets you **collaborate** with generative AI when you ask questions of your data– and see exactly what sources the LLM used to generate your answer.



Q&A with your Data



For example: You have a dataset of a survey about experiences on an airline.

You're interested understanding how the meal experience can be improved.

So, you click on the "Meal Experience" bar in the "Themes" chart, and then in the Sentiment doughnut chart, you click on "Negative" to filter your dashboard.

Now, we can ask in chat-- "What do reviewers dislike about the meals?"

Q&A with your Data

The genAI gives you an answer, and the dashboard is **filtered** to show you the exact text that was used to generate the answer in the text box. Take a look at the generated answer in the chat, and the List widget with the text used to generate this answer.

The screenshot displays a data dashboard for 'British Airways test set 2'. The main area features a donut chart with a single blue segment and the text 'the served meals || a poor qu...'. Below the chart are two panels: 'clauses' and 'Route'. The 'clauses' panel lists various customer complaints, such as 'Most of the food was awful.' and 'The food has been terrible, meagre portions given infrequently.' The 'Route' panel is a table with columns for route names and corresponding data bars.

Route	Data
Toronto to Lond...	[Bar]
Singapore to Lo...	[Bar]
London to Singa...	[Bar]
London to Chica...	[Bar]
LHR to JNB...	[Bar]
LHR to BKK...	[Bar]
Vienna to Los A...	[Bar]

The chat interface on the right shows a question: 'What do people dislike about the meals?' and an answer: 'People dislike the meals because they are awful, inedible, tasteless, disappointing, of poor quality, small portions, and lack variety. Customers have reported meals being terrible, truly awful, horrid, meagre, and substandard. Additionally, there are complaints about meal choices not being available, meals being served late, and lack of communication about meal options.'

Q&A with your Data

The filters relating to your questions can be added or removed with the filter button next to the generated response.

INSPECTOR

CREATE WIDGET

ASK QUESTIONS

NovaceneAI

Ask me questions about your data. Use the filters in the stage to narrow down the scope of your query. For more guidance on asking questions about your data, check the user manual.

You

What do people dislike about the meals?

NovaceneAI

People dislike the meals because they are awful, inedible, tasteless, disappointing, of poor quality, small portions, and lack variety. Customers have reported meals being terrible, truly awful, horrid, meagre, and substandard. Additionally, there are complaints about meal choices not being available, meals being served late, and lack of communication about meal options.

Type your question here...



FILTERS

ReviewBody Translated Clauses Text Pre-Processing ...



ReviewBody Translated Clauses Text Pre-Processing ...



Q-1 -> What do people dislike about the meals? ...



Q&A with your Data – Collaboration Tips

- Use **filters** in the stage to collaborate with the genAI– if you're interested in a specific theme, demographic, sentiment, or other dimension of your data, make sure you have these filters active before you ask your question.
- Asking specific questions helps ensure a good result. Using the example on the previous slide, for example: “What do reviewers think about the meals?” is a more specific question than “What do reviewers think?”
- **Verify** answers using the list widget. All generative AI is vulnerable to hallucinations. With this feature, you can see exactly what text has been sent to the AI to answer your question in your dashboard.
- Remember that this feature **only sends the enriched text** to the genAI—no other fields. For example: You have reviews about Shop A, B, and C. If you use the genAI feature with no filtering to ask “What do people think about Shop A?” you might get an answer saying “I don't know!”. Instead, filter the dataset by Shop A, and ask “What do reviewers think about this shop?”

Resources



1. Point of contact:

- Beck Langstone
blangstone@novacene.ai
Available via MSTeams 9-5pm ET, Tuesday - Friday
OR
- Marcelo Bursztein
mbursztein@novacene.ai
1-613-277-4435 (8 to 5 pm ET)

The **User Manual** contains detailed step-by-step instructions.

Thank you



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