

## The Next Generation of the Perceptyx People Insights Platform

The next generation of the People Insights Platform is an employee listening and analytics platform designed to meet the needs of large organizations seeking to streamline employee feedback processes, providing an **all-encompassing solution** to overcome common feedback challenges. The platform not only integrates census, pulse, triggered, lifecycle, crowdsource/focus-group, and 360/180 listening formats, but also offers insights, dynamic recommendations, and an analytics workspace.

Here's what you'll find new in the platform:

- [Home Page](#)
- [Curated Research](#)
- [Navigation Bar](#)
- [AI Hub](#)
- [Dynamic Alerts](#)
- [Analytics Studio](#)
- [Insight Cards](#)
- [Administrator Portal](#)

**Note:** If your organization does not currently use Listening Home, your experience remains the same. You can sign up to migrate your platform and experience the new updates [here](#). Once you sign up, your Program Manager will reach out to you about timing and next steps.

## Home Page

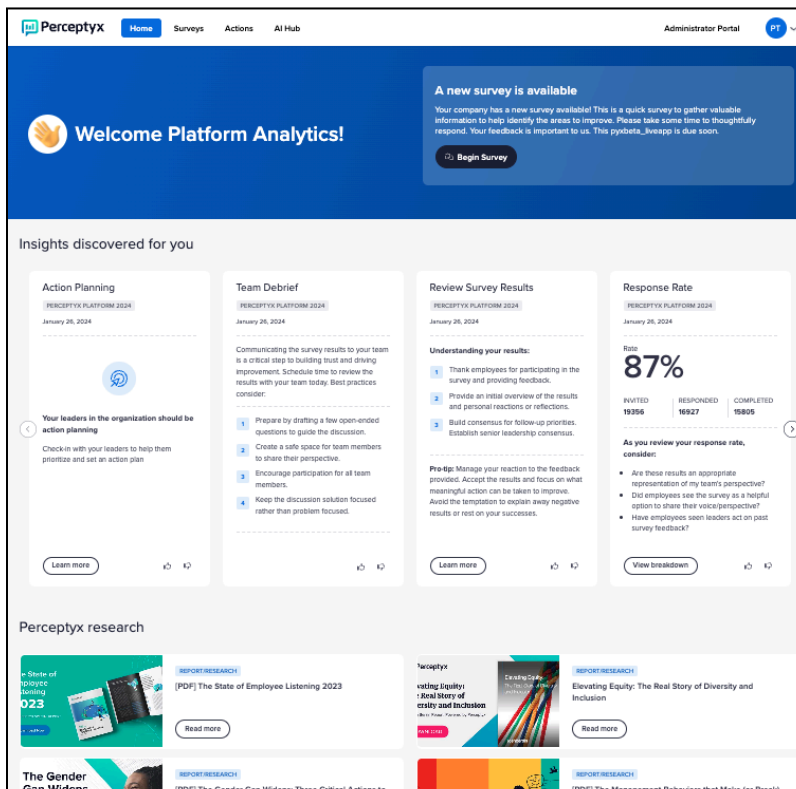
Your new **Home page** is your central location for all your listening tools, activities, and insights. On the Home page, you can keep in the know with your **dynamic alerts**, review and gain a deeper understanding of your **AI Insights**, and access **curated research** from our EX experts. You can also navigate to any area in the platform and provide feedback. Check out the [Overview of the People Insights Platform](#) video for a quick tour and the [knowledge article](#) for the step-by-step.

From the new **Home page** you can:

- View and take action on dynamic alerts (e.g., surveys, action plans, etc.)
- Explore AI generated insights from your latest Ask managed surveys
- Read, watch, or listen to curated research from our EX experts
- Navigate to other areas of the platform

**Note:** The **Home page** is available to all users, but the view and elements depend upon your role and permissions.

**Note:** Although you have a new **Home page**, your survey, reporting, and action experiences have not changed. You can still access all your information and insights - now from one central place with just one login.



The screenshot shows the Perceptyx Home page. At the top, there's a navigation bar with 'Home', 'Surveys', 'Actions', and 'AI Hub'. A user profile 'Administrator Portal' is in the top right. A blue banner at the top says 'Welcome Platform Analytics!' with a 'Begin Survey' button. Below this, a section titled 'Insights discovered for you' contains four cards: 'Action Planning', 'Team Debrief', 'Review Survey Results', and 'Response Rate'. The 'Response Rate' card shows a rate of 87% with a breakdown of 1935 Invited, 16927 Responded, and 15805 Completed. At the bottom, there's a 'Perceptyx research' section with several research reports available for reading.

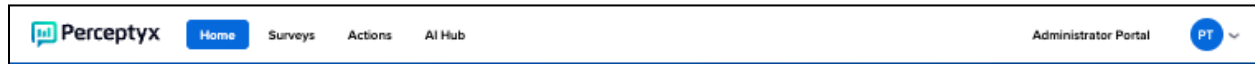
**Navigation  
Bar**

**Alerts**

**Insight Cards**

**Curated  
Research**

## Navigate Seamlessly: The Navigation Bar



The **Navigation Bar** provides one-click access to all your surveys, action plans, listening tools, and account settings.

**Note:** Your user role (Administrator, HR Leader, Team Leader/Manager) determines the items that are available in your navigation bar.

Click This Option	To Do This
Surveys	<p>View and manage all your surveys.</p> <p>Depending on your role-based permissions, you can:</p> <ul style="list-style-type: none"> <li>• View reports</li> <li>• Access <a href="#">Analytics Studio</a></li> <li>• Take surveys</li> <li>• Create new surveys</li> </ul>
Actions	View or edit action plans.
<a href="#">AI Hub</a>	Access AI Hub to analyze comment data from within and outside the platform.
<a href="#">Administrator Portal</a> (platform admins)	Access administrator tools, including a view of company details, employee roster, and user access information.
User Initials	<p>Display options for accessing account settings or signing out.</p> <p>In account settings you can manage email and Microsoft Teams app notifications for new insights generated by the AI Insights Engine and new curated research.</p>


## Stay in the Know with Your Updates and Tasks

The **Alerts** area highlights updates and time-sensitive tasks for you to complete. Review your alerts and click through to complete tasks, such as participating in new surveys or creating or reviewing action plans. The update or task with the nearest due date displays in the Alerts area. If you have multiple alerts, you can view them all by clicking the link in the bottom-right corner of the **Alerts** area.

Alert with closest due date displays first

### A new survey is available

Your company has a new survey available! This is a quick survey to gather valuable information to help identify the areas to improve. Please take some time to thoughtfully respond. Your feedback is important to us. This pyxbeta\_liveapp is due soon.

 [Begin Survey](#)

[You have 1 more action waiting](#)


Access additional alerts

Clicking the link for additional alerts displays them in a side panel.

### Pending Actions


#### A new survey is available

Your company has a new survey available! This is a quick survey to gather valuable information to help identify the areas to improve. Please take some time to thoughtfully respond. Your feedback is important to us. This pyxbeta\_liveapp is due soon.

 [Begin Survey](#)

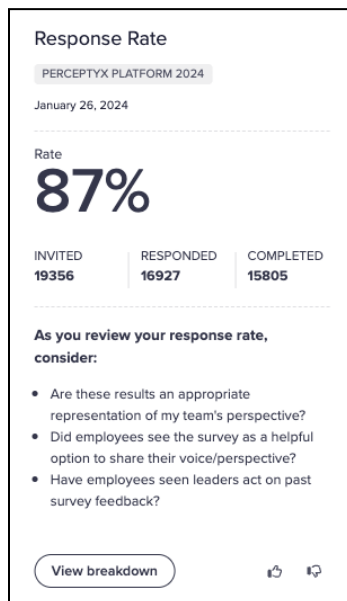
#### Action plan review approaching!

A deadline is approaching based on action plans you created for 2023 Insights Cards Test. Check-in with your team on the progress! Action plans are due on 2024-01-26

 [View action plan](#)

## Explore Insights Across Listening Events with Insight Cards

**Insight Cards** display role-specific, data-driven insights based on feedback from your most recent managed listening event. The cards are generated by the AI Insights Engine, which determines the most useful information specifically for you, your listening events, and your reporting data. Depending on your account setup specifications, you may also receive email or Microsoft Teams notifications to make your insights available in your flow of work.



### Example Only

Note that Insight cards are highly variable; your cards will look different than this example.

Depending on the type of information presented, cards may include an action button at the bottom to help you dig deeper into the insight - in a permissions-based dashboard or report, a best practices blog or article, etc.

Thumb up and thumb down icons at the bottom of each card let you indicate whether you feel the insight is helpful. The AI Insights Engine learns from your feedback and continues to tailor your insights for you.

## How Insights are Generated (Guiding Principles)

The engine uses multiple data inputs to determine if and when you see insights and which data is important for you to focus on. The main goal is to continue to resurface important data and survey metrics for you, in your flow of work, to help take action on your survey data beyond just a one time view of your report.

The main data signals that are used to generate Insight cards are:

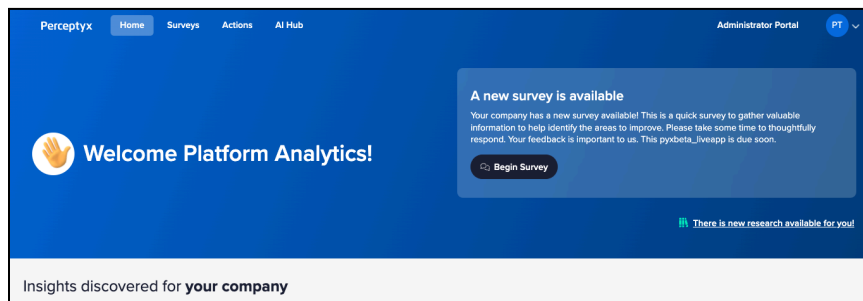
- **Employee HRIS information.** HRIS data helps us set up some basic information about users, including whether they are an individual contributor, manager, or leader.
- **Survey data.** Our algorithm pushes data frequently viewed in survey reports that you have access to, and insights to help promote results focus and actioning of survey data. These insights help spur engagement with your survey data on an ongoing basis.

- **Reporting role identification.** The engine looks at the reporting role set by the statuses assigned to each reporting user. You receive insights based only on data you already have access to. No new data is sent that you would not see in your original survey reports.
- **Action planning.** The AI engine generates Insights using action planning selections that you make within the Perceptyx platform.

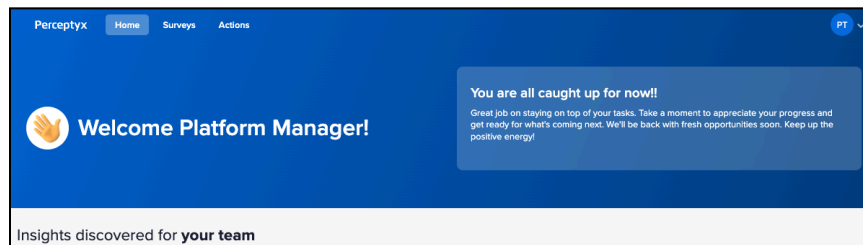
## Users with Multiple Reporting Statuses

If you have multiple reporting statuses for a survey, Insight cards are displayed in tabs specific to each status - for example, Administrator, Manager, or HR User.

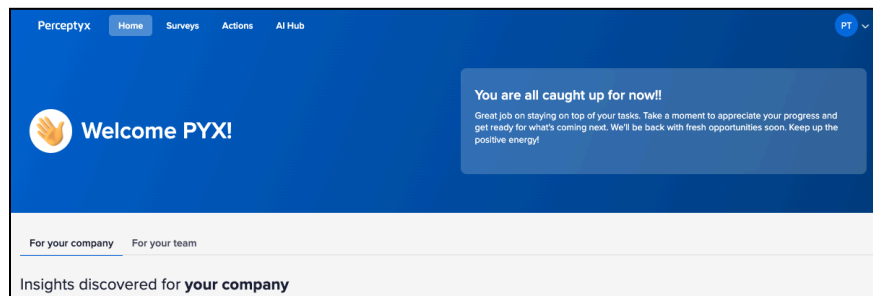
### Sample - Administrator



### Sample - Manager User



### Sample - HR User





## Expand Your Knowledge with Curated Research

Your new **Research** area provides Perceptyx research, tailored to your role, to help you drive continuous improvement. Research items include articles, blogs, podcasts, webinars, and infographics. Once a month, your Home page will display four new Perceptyx research items. Simply click the action button to access a research item.

**Perceptyx research** NEW

Discover the latest articles from this month for you. Stay up-to-date with fresh news. Enjoy exploring!



**Perceptyx** Webinar



**REPORT/RESEARCH**

Can't Buy Me Love (or Loyalty!): The Shifting Role of Compensation for Employee Retention and Attraction


Read more



**REPORT/RESEARCH**


[PDF] Employee Experience in 2021 and Beyond: Listening at Scale

Read more


**Perceptyx**

A PERCEPTYX SPECIAL REPORT


**The Factors Driving Employee Experience Now: Quiet Quitting Edition**



**REPORT/RESEARCH**

The Factors Driving Employee Experience Now: Quiet Quitting Edition

Read more



**REPORT/RESEARCH**

[PDF] The State of Employee Listening 2023

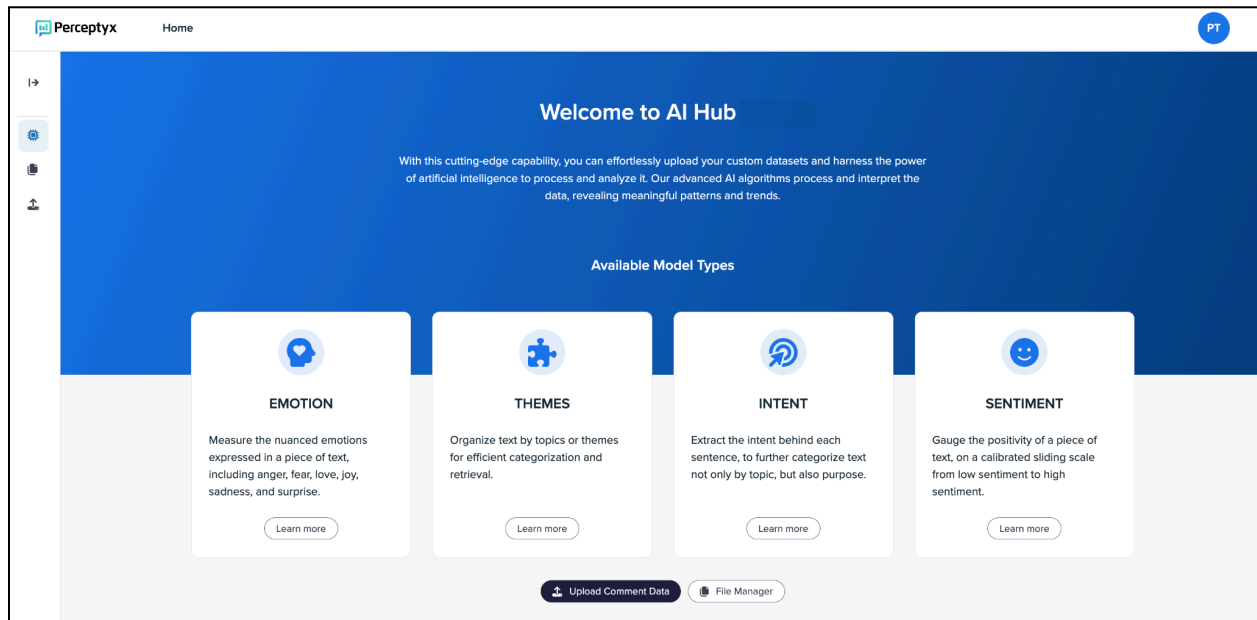
Read more

## Home Page Features by Persona

Feature	Administrator	HR User	Manager User	Respondent
Navigation Bar	✓	✓	✓	✓
• Surveys	✓	✓	✓	✓
• Actions	✓	✓	✓	
• Tools/Products	✓	✓	✓	
Administrator Portal	✓			
Account Settings	✓	✓	✓	
Alerts	✓	✓	✓	✓
AI Insights Engine	✓	✓	✓	
Curated Research	✓	✓	✓	

## AI Hub – Analyze Your Comment Data from Other Sources

The **Perceptyx AI Hub** is a new tool to help you easily discover insights in your comment data collected from sources inside or outside of the Perceptyx platform. It uses four proprietary AI models to automatically analyze your data for you in a simple report you can use to quickly identify what's going well and where you might need to focus action. This tool is specifically tailored for data scientists and people analytics teams to enhance comment analysis capabilities, enabling deeper insights and data-driven decision-making.



For a quick demonstration of AI Hub, check out the [Overview of AI Hub](#) video. For the step-by-step, check out the [knowledge article](#).

**Note:** AI Hub is only available to Administrative Users.

### Access the AI Hub

Access the AI Hub from your Navigation Bar.




## AI Models

AI Hub uses four models to process and interpret data:

- **Emotion:** Measures nuanced emotions expressed in comments, including anger, fear, love, joy, sadness, and surprise.
- **Themes:** Organizes comment data by topics or themes for efficient categorization and retrieval.
- **Intent:** Extracts the intent behind each comment, to further categorize text not only by topic, but also purpose.
- **Sentiment:** Gauges the positivity of a piece of text, on a calibrated sliding scale from low sentiment to high sentiment.

Learn more about each model by clicking its **Learn more** button.



**EMOTION**

Measure the nuanced emotions expressed in a piece of text, including anger, fear, love, joy, sadness, and surprise.

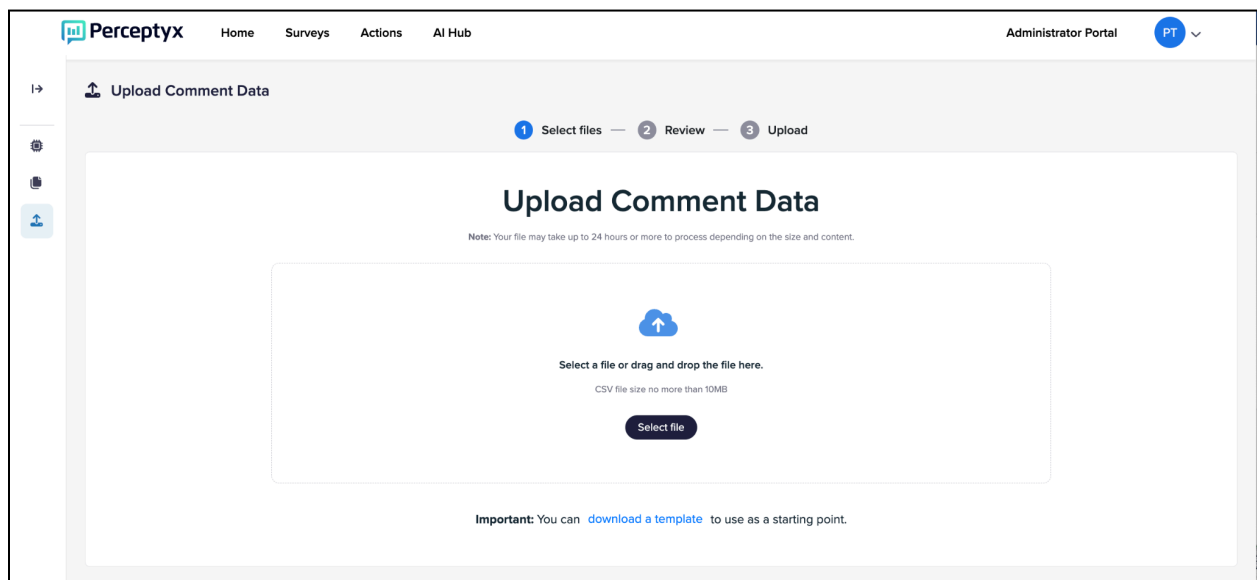
[Learn more](#) ←

## Easy Data Upload

AI Hub provides two options for uploading your data into the tool for analysis:

- Directly upload an existing file.
- Download, complete, and upload a template.

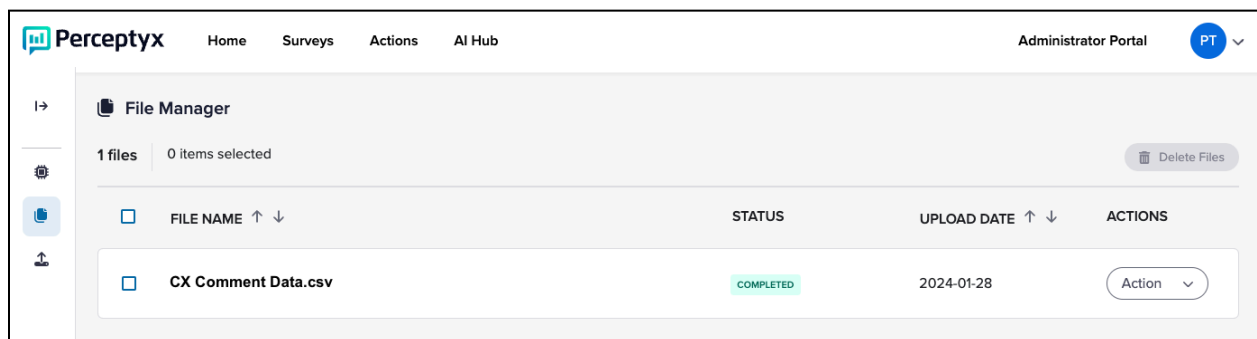
**Note:** The data file must be in .csv format and include two columns of information: Comment ID (number 0-X) and Text (comment text).



You will receive an email notification when the dataset has been processed. This may take 24 hours or more, depending on the file size and content.

## Quick Access to the Processed Data File

After you receive the email notification, you can download your processed data file from the AI Hub File Manager page.



## Logical Report Format and Output

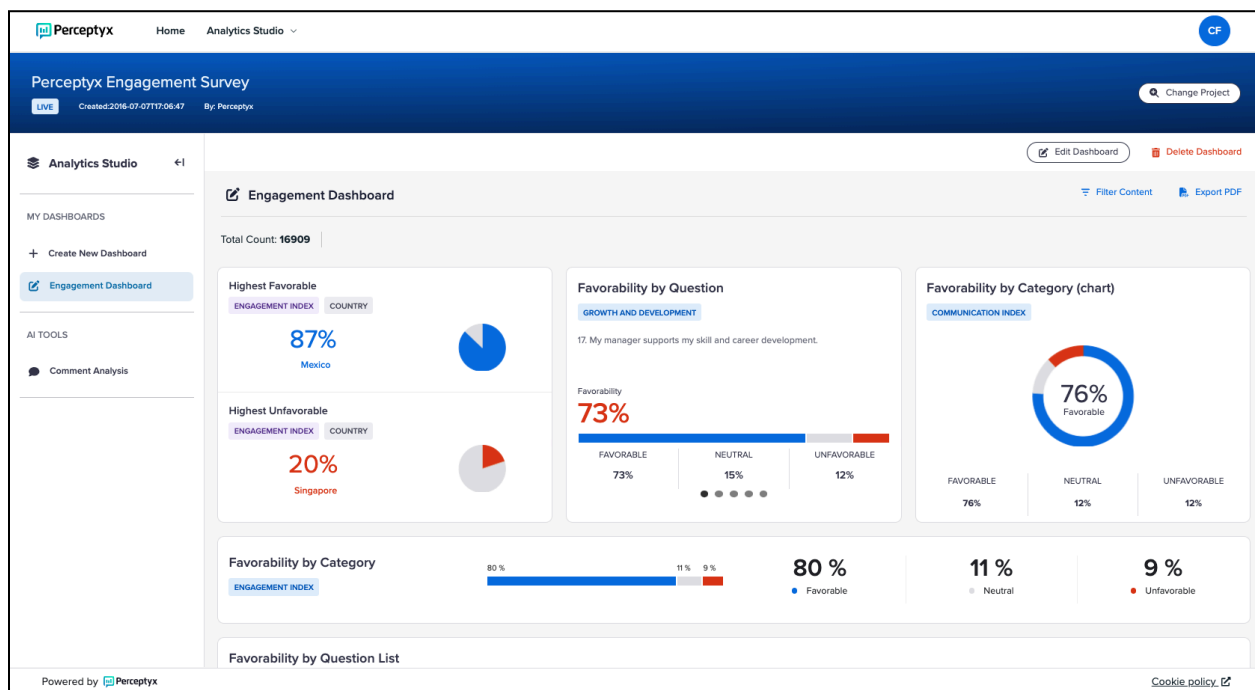
The processed data file is delivered in .csv format with separate columns for each theme, intent, and emotion, as well as a Sentiment column.

	AI	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB
1	Theme	Theme	Theme	Theme	Theme	Theme	Theme	Theme	Intent	Intent	Intent	Intent	Intent	Sentiment	Emotion	Emotion	Emotion	Emotion	Emotion	Emotion	
2	Social Respo	Strategy	Survey Resul	Teamwork	Trust	Turnover	Work Life Ba	Workload	Angry	Needs	Praise	Should	Wants	Sentiment	Anger	Fear	Joy	Love	Sadness	Surprise	
3																					
4														0 neutral	0	0	0	0	0	0	
5														0 positive	0	0	0	0	0	0	
6														0 positive	0	0	0	0	0	0	
7														0 positive	0	0	0	0	0	0	
8														0 positive	0	0	1	0	0	0	
9														0 positive	0	0	0	0	0	0	
10														0 positive	0	0	0	0	0	0	
11														0 positive	0	0	0	0	0	0	
12														0 positive	0	0	0	0	0	0	
13														0 negative	0	0	0	0	0	0	
14														0 negative	0	0	0	0	0	0	
15														0 neutral	0	0	0	0	0	0	
16														0 positive	0	0	0	0	0	0	
17														1 neutral	0	0	0	0	0	0	
18														0 neutral	0	0	0	0	0	0	
19														0 negative	0	0	0	0	0	0	
20														0 positive	0	0	0	0	0	0	
21														0 negative	0	0	0	0	0	0	
22														0 neutral	0	0	0	0	0	0	
23														0 negative	0	0	0	0	0	0	
24														0 positive	0	0	0	0	0	0	
25														0 positive	0	0	0	0	0	0	
26														0 neutral	0	0	0	0	0	0	
27														0 negative	0	0	0	0	0	0	
28														0 neutral	0	0	0	0	0	0	
29														0 positive	0	0	0	0	0	0	
30														0 neutral	0	0	0	0	0	0	
31														0 negative	0	0	0	0	0	0	
32														1 negative	0	0	0	0	0	0	
33														0 neutral	0	0	0	0	0	0	
34														1 positive	0	0	0	0	0	0	
35														0 positive	0	0	0	0	0	0	
36														0 positive	0	0	0	0	0	0	
37														0 positive	0	0	0	0	0	0	
38														1 negative	0	0	0	0	0	0	
39														1 neutral	0	0	0	0	0	0	
40														0 positive	0	0	0	0	0	0	
41														0 positive	0	0	0	0	0	0	
42														0 neutral	0	0	0	0	0	0	
43														0 negative	0	0	0	0	0	0	
44														0 negative	0	0	0	0	0	0	
45														0 positive	1	0	0	0	0	0	
46														0 positive	0	0	0	0	0	0	
47														0 positive	0	0	0	0	0	0	
48														0 negative	0	0	0	0	0	0	
49														0 neutral	0	0	0	0	0	0	
50														0 positive	0	0	0	0	0	0	
51														0 positive	0	0	1	0	0	0	
52														0 negative	0	0	0	0	0	0	

- For every comment in your dataset, the processed file shows a 0 or a 1 to indicate whether a specific theme, intent, or emotion was detected.
- The Sentiment column displays Positive, Neutral, or Negative to indicate the type of sentiment detected.
- You can easily aggregate the data for any theme, intent, or emotion.

## Analytics Studio – Create Custom Dashboards & Leverage Analytics Models

Our new **Analytics Studio** enables you to create and save custom dashboards for your managed and self-service surveys as well as explore comment analysis with Perceptyx analytics models around themes, sentiment, and intent. Create different dashboards for your surveys that reflect how you want to view and use your data. Then use the comment analysis feature to identify suggestions for actions, improvements, as well as wants and preferences from your comment data.



For a quick demonstration of Analytics Studio, check out the [Overview of Analytics Studio](#) video. For the step-by-step, check out the [knowledge article](#).

**Note:** Only Administrative and Creator Users have access to Analytics Studio. Users only see the listening events applicable to their access.

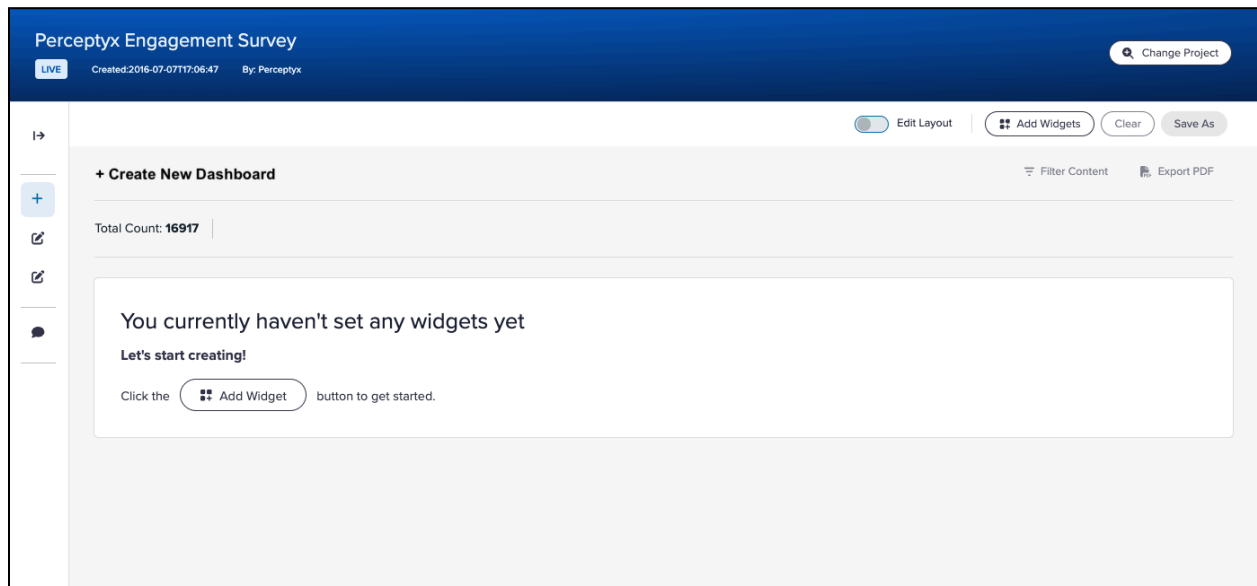
## Accessing Analytics Studio

1. In the navigation bar, click **Surveys**.
2. Click the **Analytics Studio** link for the survey you want to work with.

## Easily Create Custom Dashboards

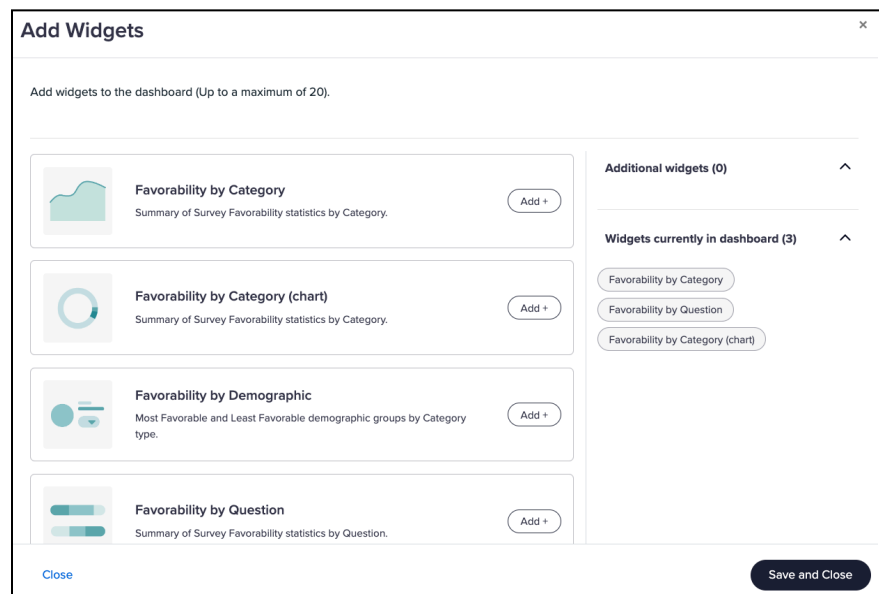
For each listening event, you can create up to 5 dashboards with up to 20 widgets each. You can create a dashboard in four easy steps:

- 1 Near the top of the page, click + **Create New Dashboard** to open an empty workspace.

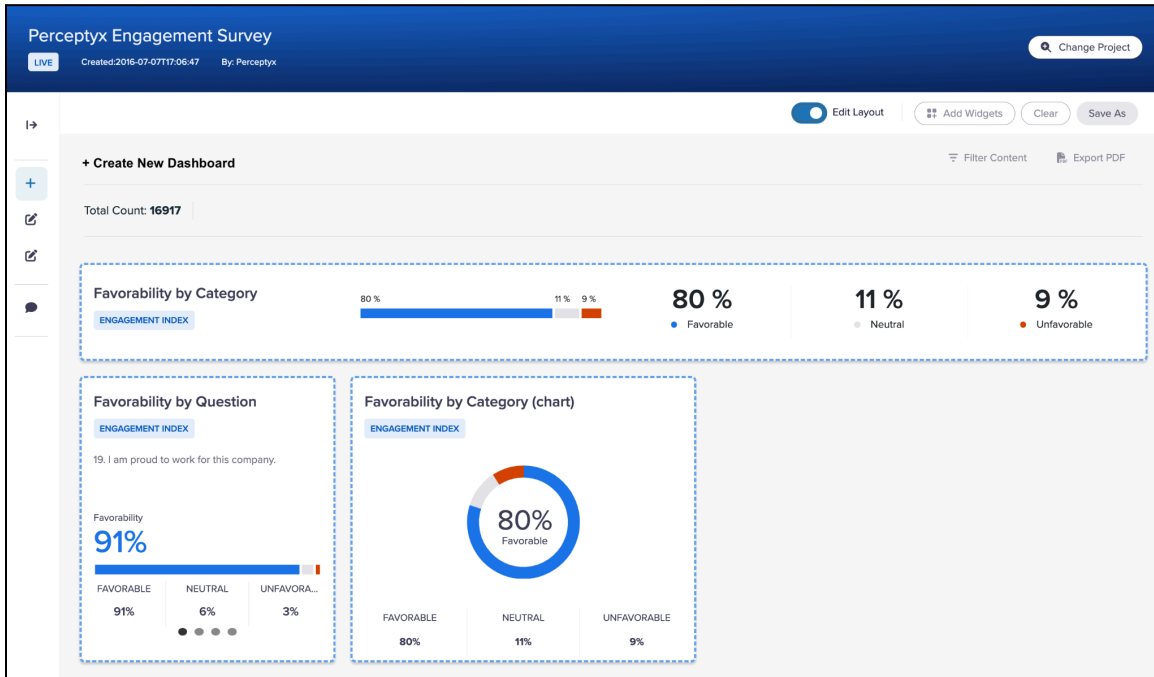



- 2 Click the **Add Widgets** button to display the Add Widgets dialog box.

Click the **Add+** button for each widget you want to add, then click the **Save and Close** button.



- Turn on the **Edit Layout** option, then drag and drop the widgets to your preferred locations in the workspace.



- Turn off the **Edit Layout** option to set the widgets in place, then click the options button  in the upper right corner of any widget you want to customize.

Customizations vary by widget type, but include things like:

- Widget Title
- Widget Category
- Data Category
- Chart Type
- Demographic

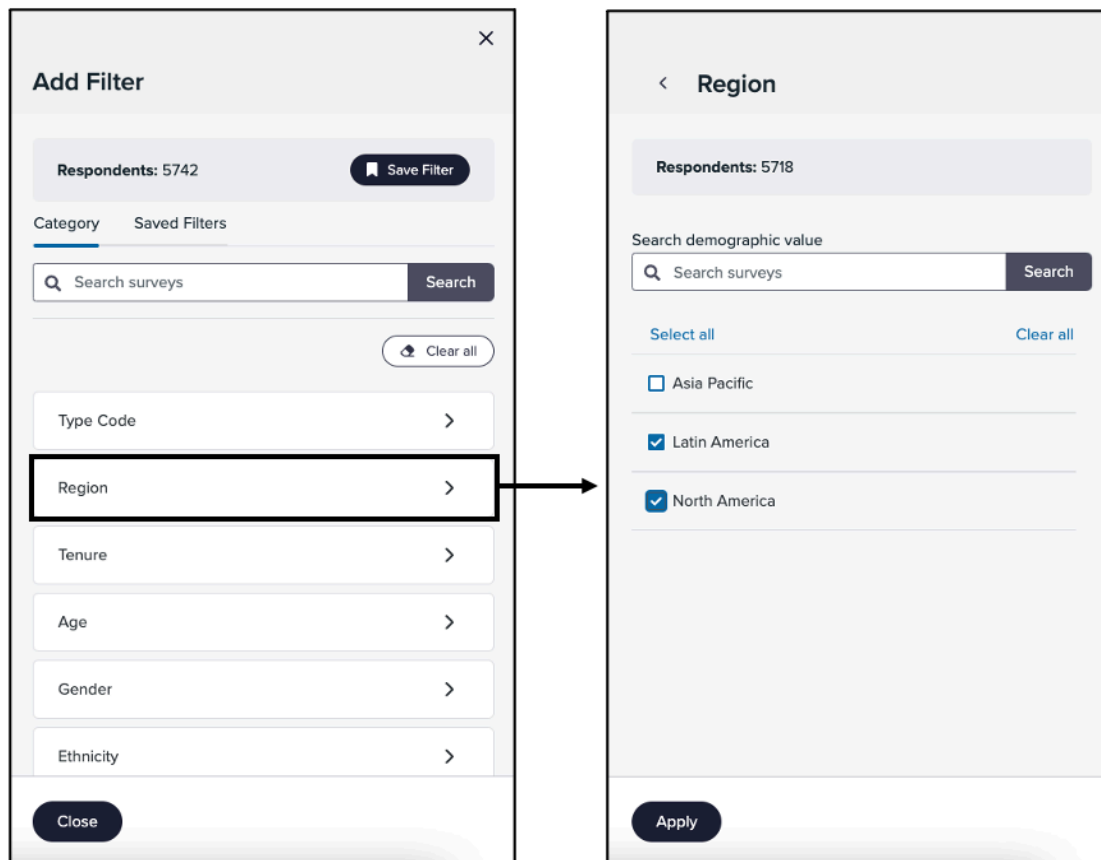
You can also click the options button and then click **Remove** to remove a widget from the dashboard.

The screenshot shows the customization panel for the 'Favorability by Category' widget. It has a title bar with a close button. The panel is divided into two main sections: 'Customizations' and 'Data Category'. The 'Customizations' section includes a text input for 'Title' (currently 'Favorability by Category (chart)'), a toggle for 'Show widget title' (checked), a toggle for 'Show widgets category' (checked), and a dropdown for 'Select chart type' (currently 'Doughnut Chart'). The 'Data Category' section includes a text input for 'Select the category you want to see.' (currently 'Engagement') and a dropdown for 'Select category' (currently 'Engagement'). At the bottom, there are 'Close' and 'Save and Close' buttons.

## Quickly Apply Filters to Dashboards

**Filters** in Analytics Studio are dynamic and cumulative. The options available for your filters are based on the demographic data your organization has supplied and your role-based permissions.

Clicking the **Filter Content** option displays the Add Filter dialog box, from which you can select a category and specific options.



Applied filters display at the top of the workspace.



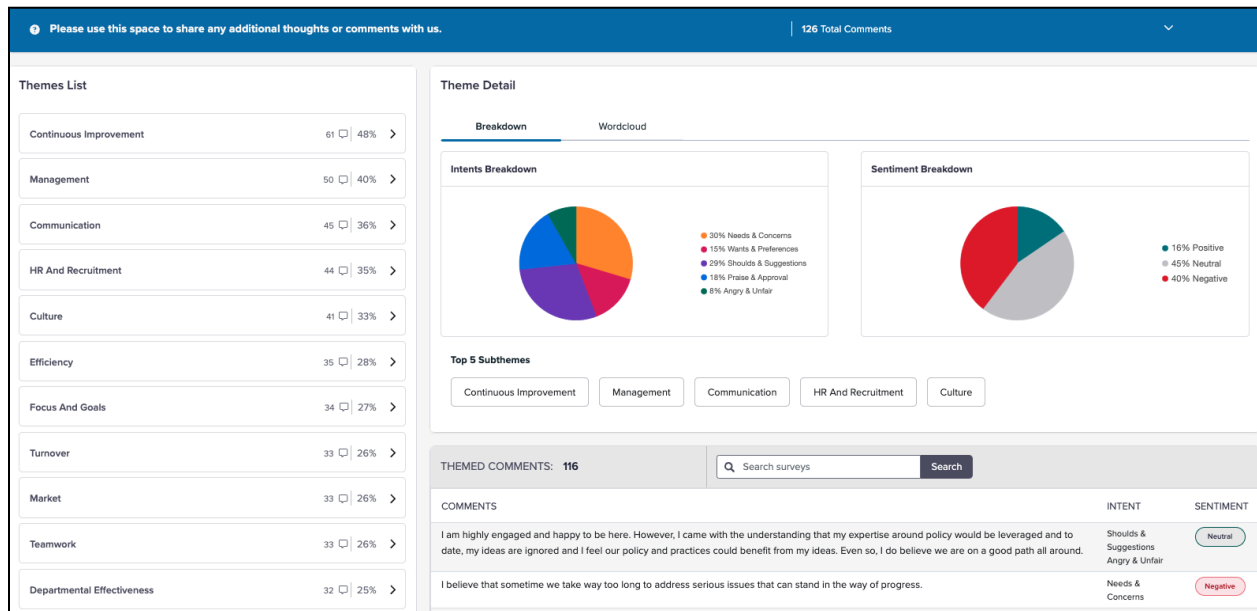
- Hover over a filter to display its options.
- Click the Remove (X) button to remove a filter.

## Uncover Insights Using AI-Driven Comment Analysis

The **Comment Analysis** workspace provides easy to use tools to help you discover insights from your comment data based on Perceptyx's theme, sentiment, and intent analytics models.

In the Comment Analysis section, you can see the number of comments and percentage of comments tied to each theme in your data. Select a theme to also view:

- Intents Breakdown
- Sentiment Breakdown
- Top 5 Subthemes
- Themed Comments
- Wordcloud



Clickable graphics in the **Intents Breakdown** and **Sentiment Breakdown** sections enable you to filter by specific intent or sentiment.



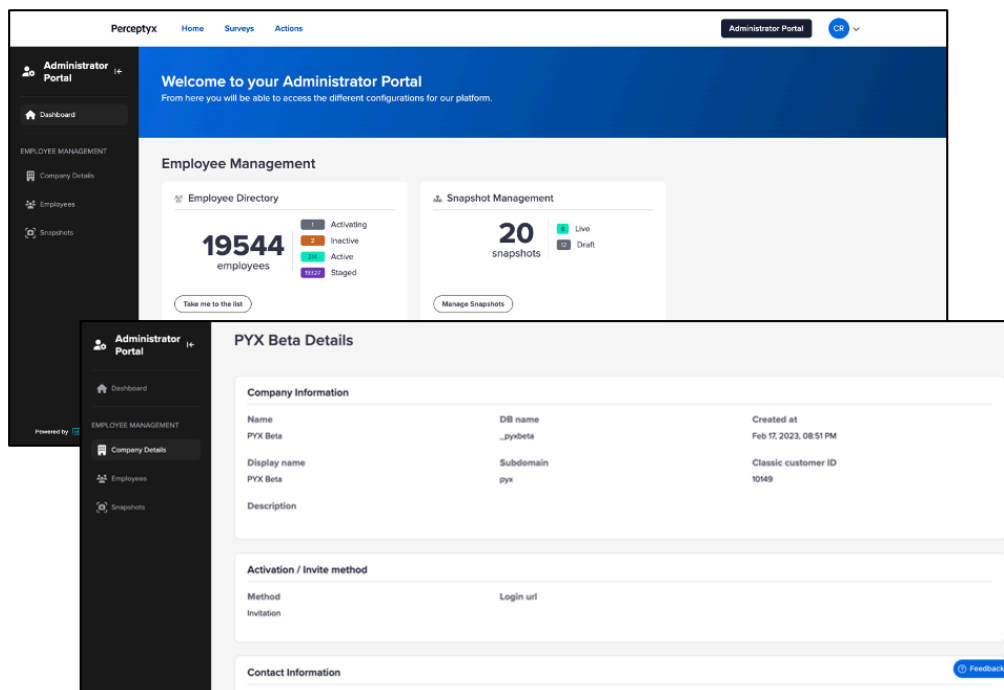
Clicking the **Wordcloud** tab displays comments in a wordcloud that is color-coded for sentiment. Click a word or phrase in the wordcloud to display its associated comments in the Themed Comments pane.

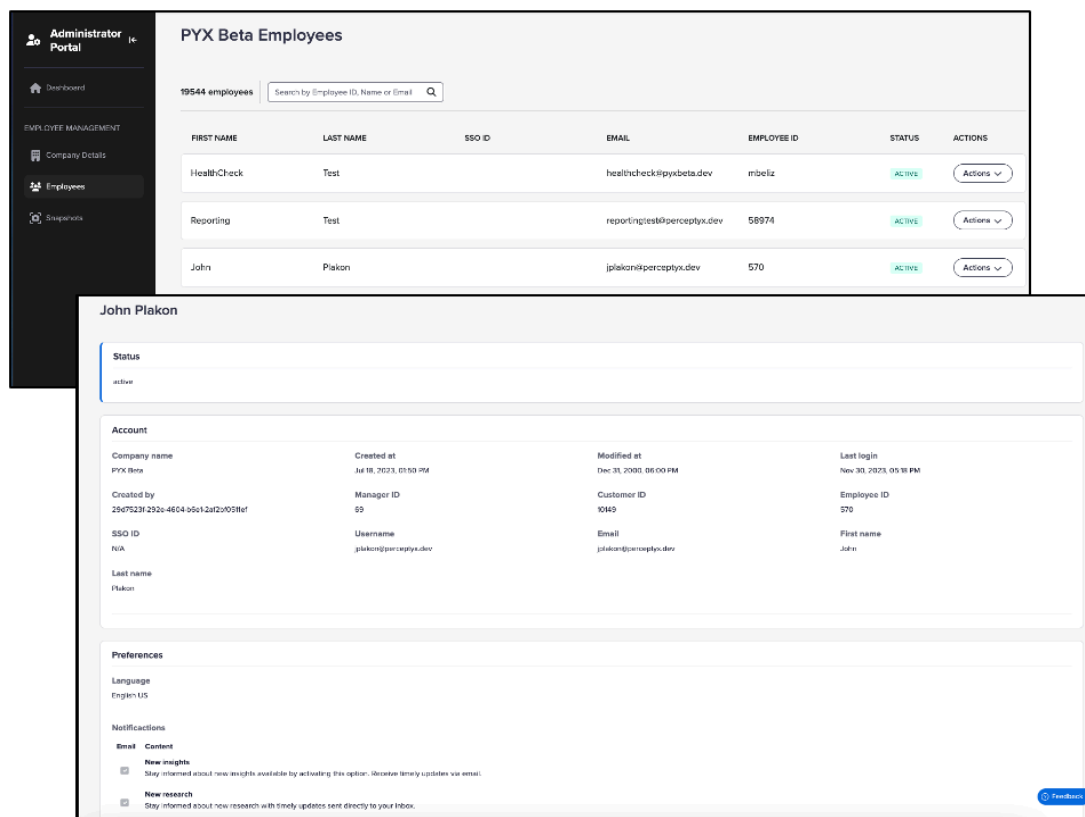


## Administrator Portal

The **Administrator Portal** provides access for platform administrators to view full company details on the dashboard, including a full list of employees and their user details and user account information. The portal will provide read-only access at the time of the platform launch; however, integration and file management capabilities are on the roadmap. For the step-by-step, check out the [knowledge article](#).

**Note:** The Administrator Portal displays for Administrative users only.





**Administrator Portal**

- Dashboard
- EMPLOYEE MANAGEMENT
  - Company Details
  - Employees**
  - Snapshots

### PYX Beta Employees

19544 employees

FIRST NAME	LAST NAME	SSO ID	EMAIL	EMPLOYEE ID	STATUS	ACTIONS
HealthCheck	Test		healthcheck@pyxbeta.dev	mibelz	ACTIVE	Actions ▾
Reporting	Test		reportingtest@perceptyx.dev	58974	ACTIVE	Actions ▾
John	Plakon		jplakon@perceptyx.dev	570	ACTIVE	Actions ▾

#### John Plakon

**Status**

active

**Account**

Field	Value	Field	Value
Company name	PYX Beta	Created at	Jul 18, 2023, 01:50 PM
Created by	29d7623f-292e-4604-b6a1-2af2x001hef	Modified at	Dec 31, 2023, 06:00 PM
SSO ID	N/A	Manager ID	89
Last name	Plakon	Customer ID	1049
		Employee ID	570
		Username	jplakon@perceptyx.dev
		Email	jplakon@perceptyx.dev
		Last login	Nov 30, 2023, 05:18 PM
		First name	John

**Preferences**

Language: English US

**Notifications**

Email	Content
<input checked="" type="checkbox"/>	<b>New insights</b> Stay informed about new insights available by activating this option. Receive timely updates via email.
<input checked="" type="checkbox"/>	<b>New research</b> Stay informed about new research with timely updates sent directly to your inbox.

[Feedback](#)

**Note:** The Snapshots option will function as the hierarchy view in future releases.

## Questions?

If you have questions about the People Insights Platform functionality or launch, please reach out to your HR Admin or Customer Success Manager.