

**April 29, 2017**

This weekend we **switched to a new natural language processing partner** that provides greater flexibility in our text analysis solution, Discover.

This first phase of the transition will not result in much visual change for your text analysis. There are a few items that we will no longer be using. After polling our customer base and analysing the output, it makes sense for us to remove some obsolete attributes.

The following are the attributes that are remaining:

<b>Valid text insight attributes</b>
Sentiment
Top Topics
Subject (Domain)
Suggests Ideas (Offers Guidance)
Wants Help (Requests Guidance)

These attributes will be removed:

<b>Obsolete text insight attributes</b>
Actions
Age
Education
Decisiveness
Gender
Flamboyance
Slang
Temporality
Contrast

### 3 key areas being touched

#### CRM Mapping

What we're removing	What's not going to change
<b>Obsolete attributes.</b>	Fields which map a <b>valid</b> text insight attribute.
	Fields which map to an <b>obsolete</b> text insight attributes.
	All other conditions, including those that mention <b>obsolete</b> text insight attributes.

#### Reports

What we're removing	What's not going to change
Nothing.	Question selection -> Text Insight selections for <b>valid</b> text insight attributes.
	Filter conditions, including those that mention <b>Obsolete</b> text insight attributes.

#### Saved Filters

What we're removing	What's not going to change
Nothing.	Filter conditions, including those that mention <b>Obsolete</b> text insight attributes.

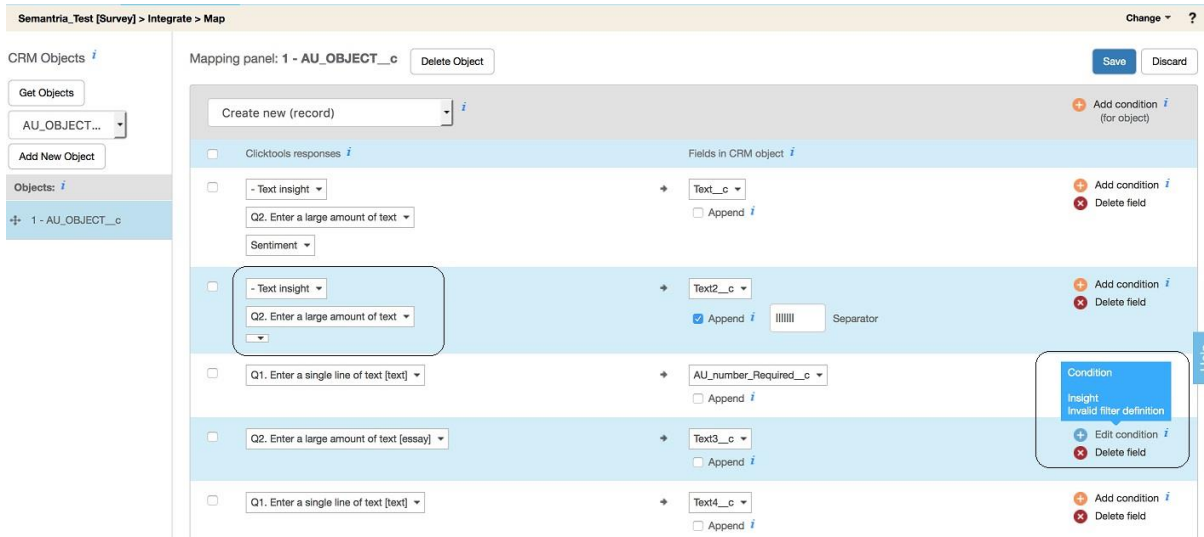
## What to do if you are using some of the obsolete text insights and how to correct them.

### CRM Mapping

1. You have got a CRM mapping making use of the text insight attributes we want to remove: Shown in the black box (conditions that will change shown in blue box)

The screenshot shows the Clicktools CRM Mapping interface. On the left, there's a sidebar with 'CRM Objects' and a list of objects, including '1 - AU\_OBJECT\_\_c'. The main area is titled 'Mapping panel: 1 - AU\_OBJECT\_\_c' and contains a table of mappings. The table has two columns: 'Clicktools responses' and 'Fields in CRM object'. One row is highlighted with a black box, showing a response with a '- Text insight' dropdown and a condition 'Q2: Enter a large amount of text'. Another row is highlighted with a blue box, showing a response with a '- Text insight' dropdown and a condition 'Q2: Enter a large amount of text (Sentiment = Positive)'. A tip at the bottom explains synchronization errors: 'Tip: This mapping may cause synchronization errors in certain circumstances. Please ensure that your text field responses are validated as the double text field responses in Clicktools to a required question in CRM. Please make this question required on your Clicktools survey.'

2. After the Update, Notice the dropdown and condition do not reference the text insight attribute. The obsolete attribute has been removed.

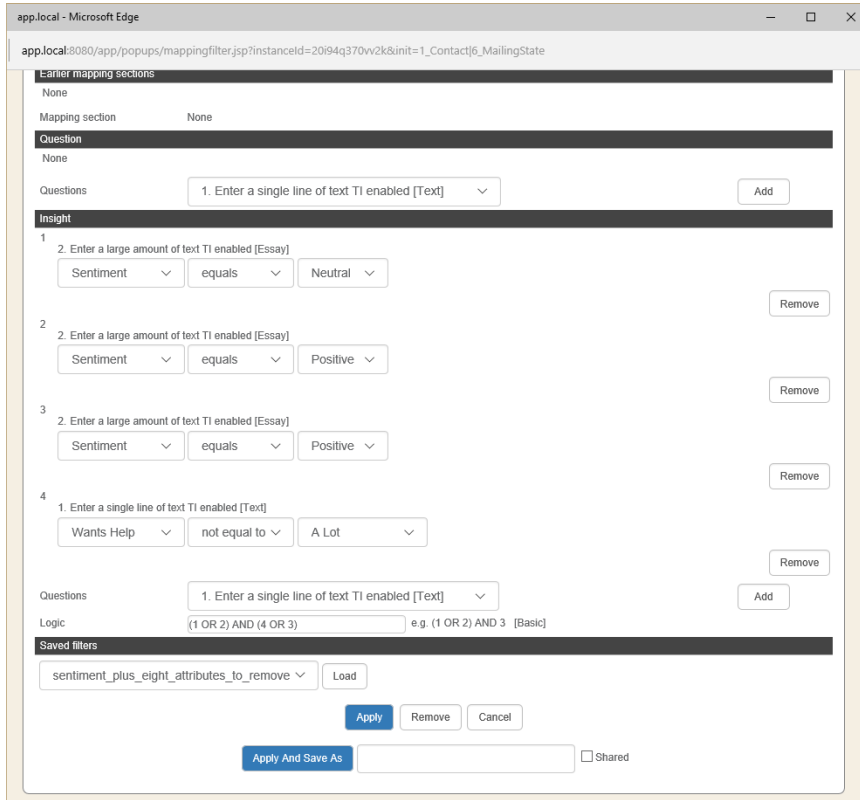


3.

## What to do to fix this.

Remove the invalid attribute field mapping manually and save the mapping to correct the obsolete Text Insight. To remove mapping, click the delete field button for the now blank text insight.

For the invalid condition: Go into the condition with the “invalid filter definition” and invalid portions are displayed as Sentiment equals Positive (they have not changed in the database).



To correct this filter you can remove and edit the Discover insights to meet your criteria. As shown below.

app.local - Microsoft Edge  
app.local:8080/app/popups/mappingfilter.jsp

### Filter definition

**Earlier mapping sections**  
None  
Mapping section None

**Question**  
None  
Questions 1. Enter a single line of text TI enabled [Text] Add

**Insight**

1  
2. Enter a large amount of text TI enabled [Essay]  
Sentiment equals Neutral Remove

2  
1. Enter a single line of text TI enabled [Text]  
Wants Help not equal to A Lot Remove

Questions 1. Enter a single line of text TI enabled [Text] Add

Logic (1 OR 2) AND (4 OR 3) e.g. (1 OR 2) AND 3 [Basic]

**Saved filters**  
sentiment\_plus\_eight\_attributes\_to\_remove Load

Apply Remove Cancel

Apply And Save As   Shared

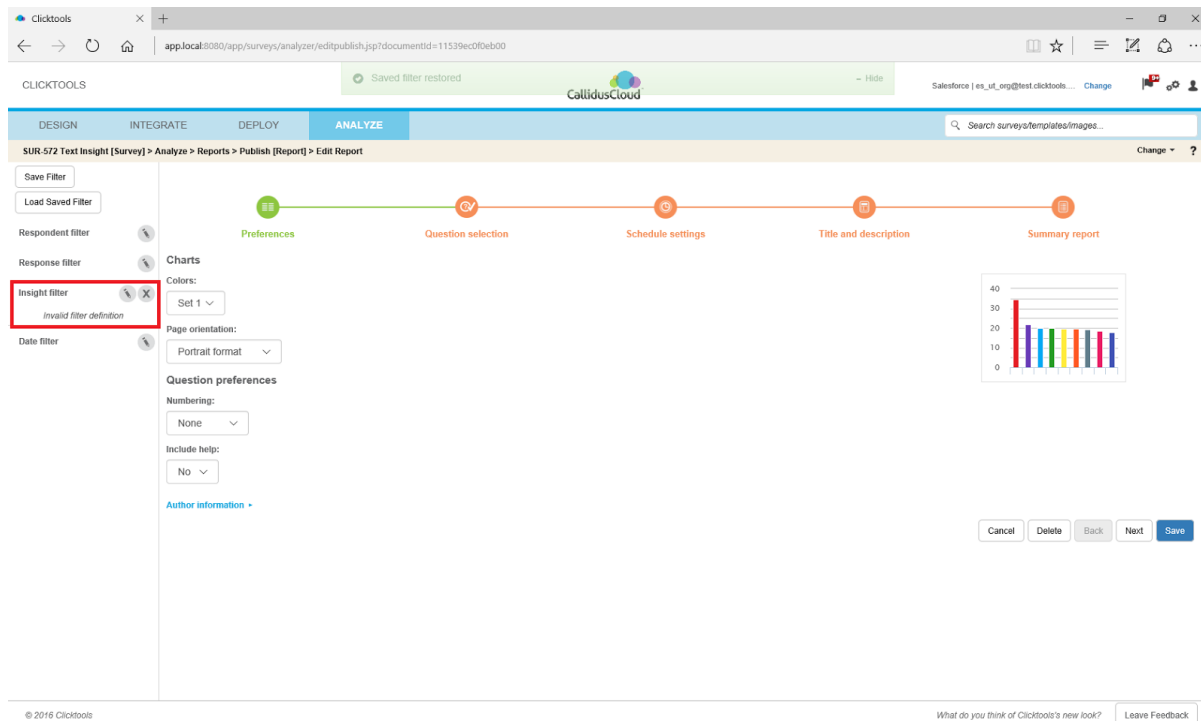
http://app.local:8080/app/popups/mappingfilter.jsp

## What happens if we don't update the conditions???

The record **will still sync with Salesforce** if other conditions in place are met -- in other words only the text insight condition using obsolete attributes will always fail.

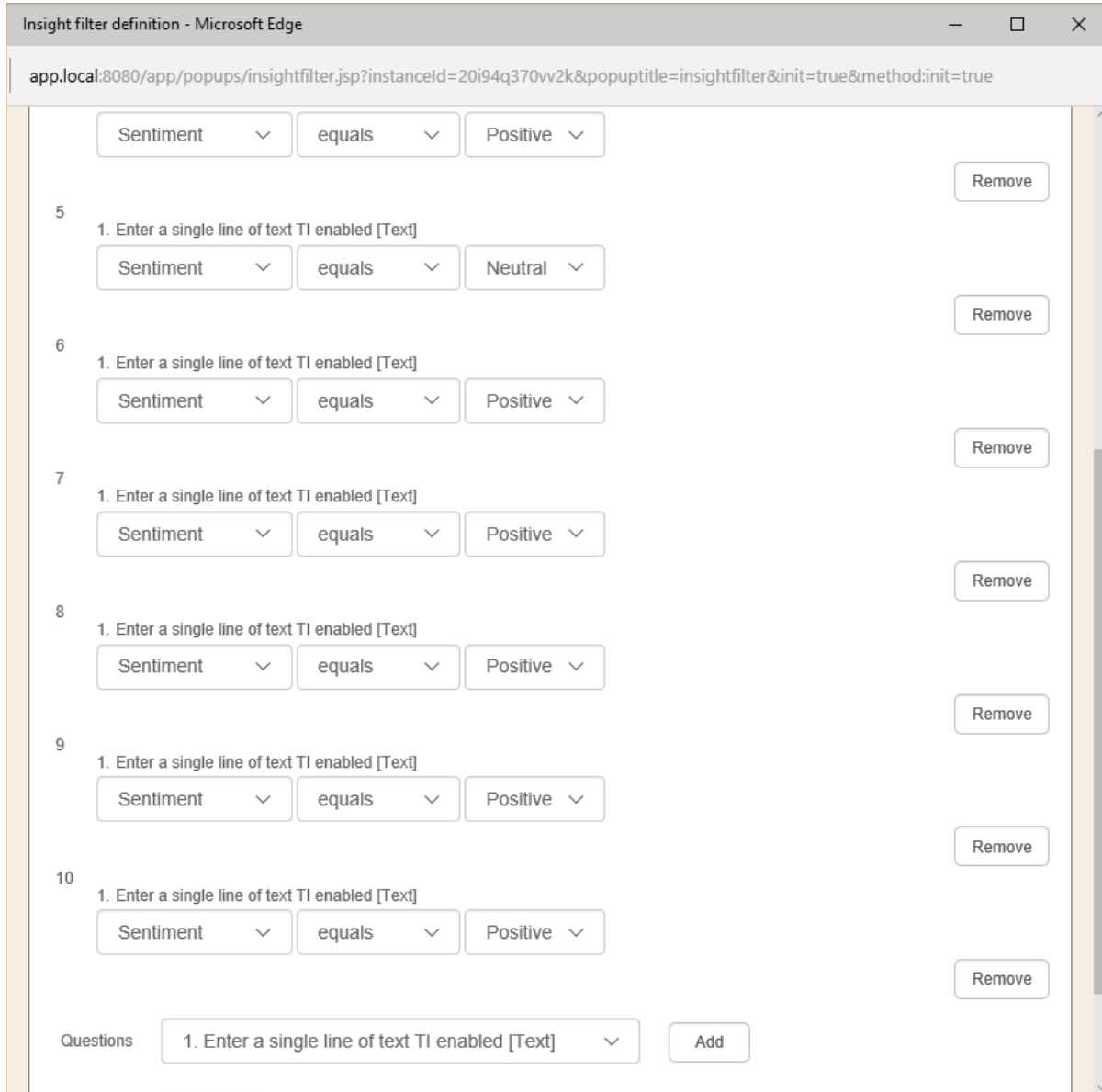
## Reports (PDF Summaries, Raw Data) and Saved Filters (Contacts or Results)

When you open a **report** for editing that has a filter saved in its definition, or if you use an existing **saved filter** (for contacts (Deploy menu) or results (Analyze menu)) anywhere in the app: if the filter is using obsolete Text Insight attributes, a message “Invalid filter definition” appears in the filter area.



The screenshot shows the Clicktools web application interface for editing a report. The browser address bar shows the URL: `app.local:8080/app/surveys/analyzer/edit/publish.jsp?documentId=11539ec0f6eb00`. The application header includes the CallidusCloud logo and a user profile for 'Salesforce | es\_ut\_09@test.clicktools...'. The main navigation bar has tabs for 'DESIGN', 'INTEGRATE', 'DEPLOY', and 'ANALYZE'. Below this, a breadcrumb trail reads: 'SUR-572 Text Insight [Survey] > Analyze > Reports > Publish [Report] > Edit Report'. A progress bar indicates the current step is 'Title and description', with previous steps being 'Preferences', 'Question selection', and 'Schedule settings', and a final step 'Summary report'. On the left sidebar, the 'Insight filter' section is highlighted with a red box and shows the message 'Invalid filter definition'. Other filter options include 'Respondent filter', 'Response filter', and 'Date filter'. The main content area displays a bar chart with a y-axis from 0 to 40 and a legend. Below the chart are buttons for 'Cancel', 'Delete', 'Back', 'Next', and 'Save'. The footer contains the copyright notice '© 2016 Clicktools' and a 'Leave Feedback' button.

Click on the filter edit button and the invalid parts of the filter are displayed as “Sentiment equals Positive” even though they haven’t actually changed.



Edit the filter to remove / alter the invalid parts, then save your changes. This will correct the filter.

For **reports**: you need to then **save the report definition as a whole using the report SAVE button** for the changes to be permanent.

For **saved filters**: you need to use the **Save Filter** button / dialog box to overwrite the invalid filter with your new corrected version of the filter, for the changes to be permanent.