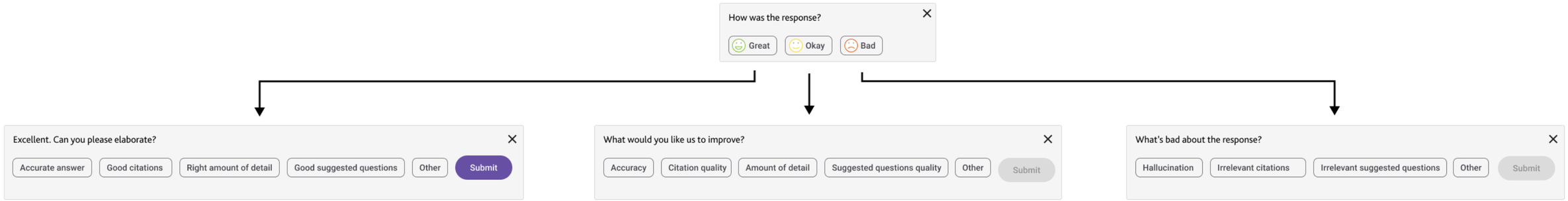
User feedback - logic and flow

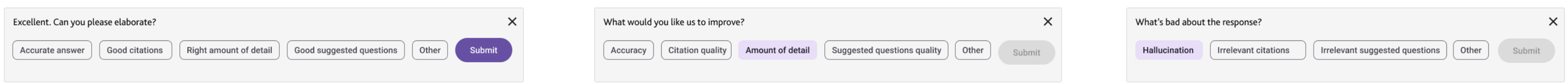


"Submit" button is clickable without selecting any options, only in "Great" scenario

User does not have to select anything. "Submit" button is enabled by default.

User has to select at least 1 option, in order for the "Submit" button to become clickable.

User has to select at least 1 option, in order for the "Submit" button to become clickable.

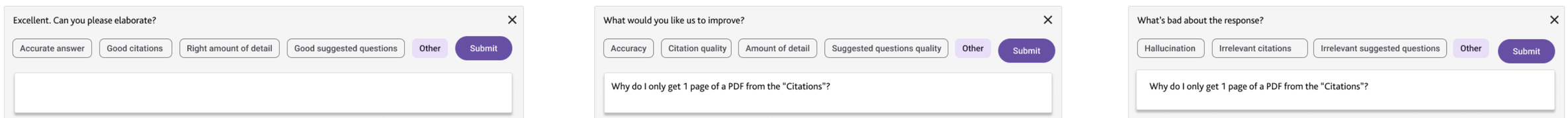


If user selects only "Other" option, "Submit" button is clickable without typing in any free text, only in "Great" scenario

If user selects "Other", they get a free text input box. But they don't have to type anyting in it. They can just proceed to "Submit".

If user selects "Other", they get a free text input box. They have to type something in the free text input box, in order to get the "Submit" button to activate.

If user selects "Other", they get a free text input box. Input is optional though. User can still "Submit", without typing into the box.

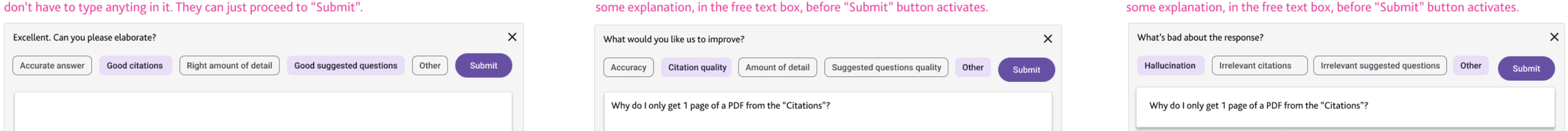


User can select multiple options, and "Other" among them, and "Submit" button is clickable without typing in any free text, only in "Great" scenario

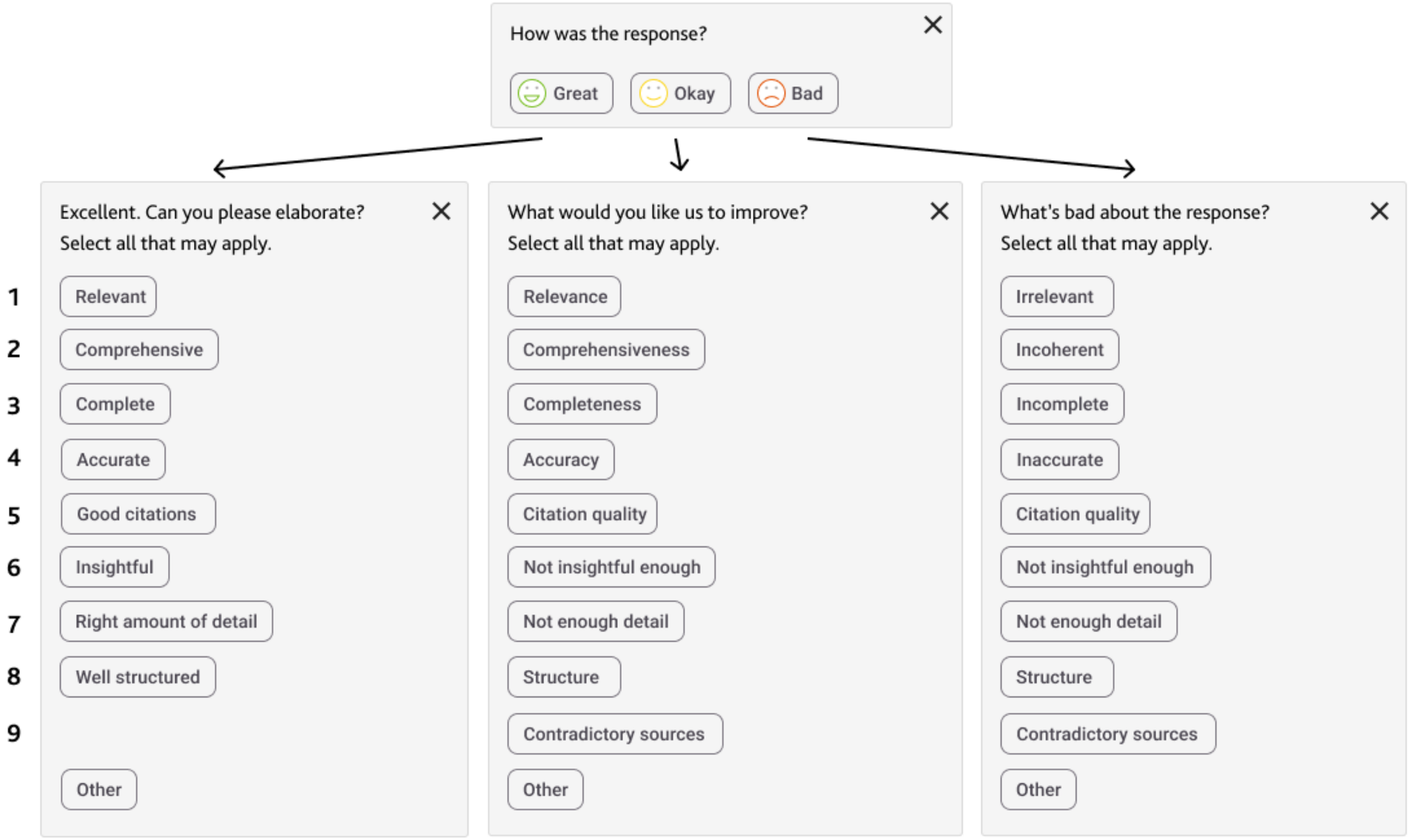
If user selects multiple options, "Other" among them, they get a free text input box. But they don't have to type anyting in it. They can just proceed to "Submit".

If user selects multiple options, but 1 of them is "Other", still have to provide some explanation, in the free text box, before "Submit" button activates.

If user selects multiple options, but 1 of them is "Other", still have to provide some explanation, in the free text box, before "Submit" button activates.



User feedback - content strategy. I came up with these options, so Product Manager can just pick what she liked.



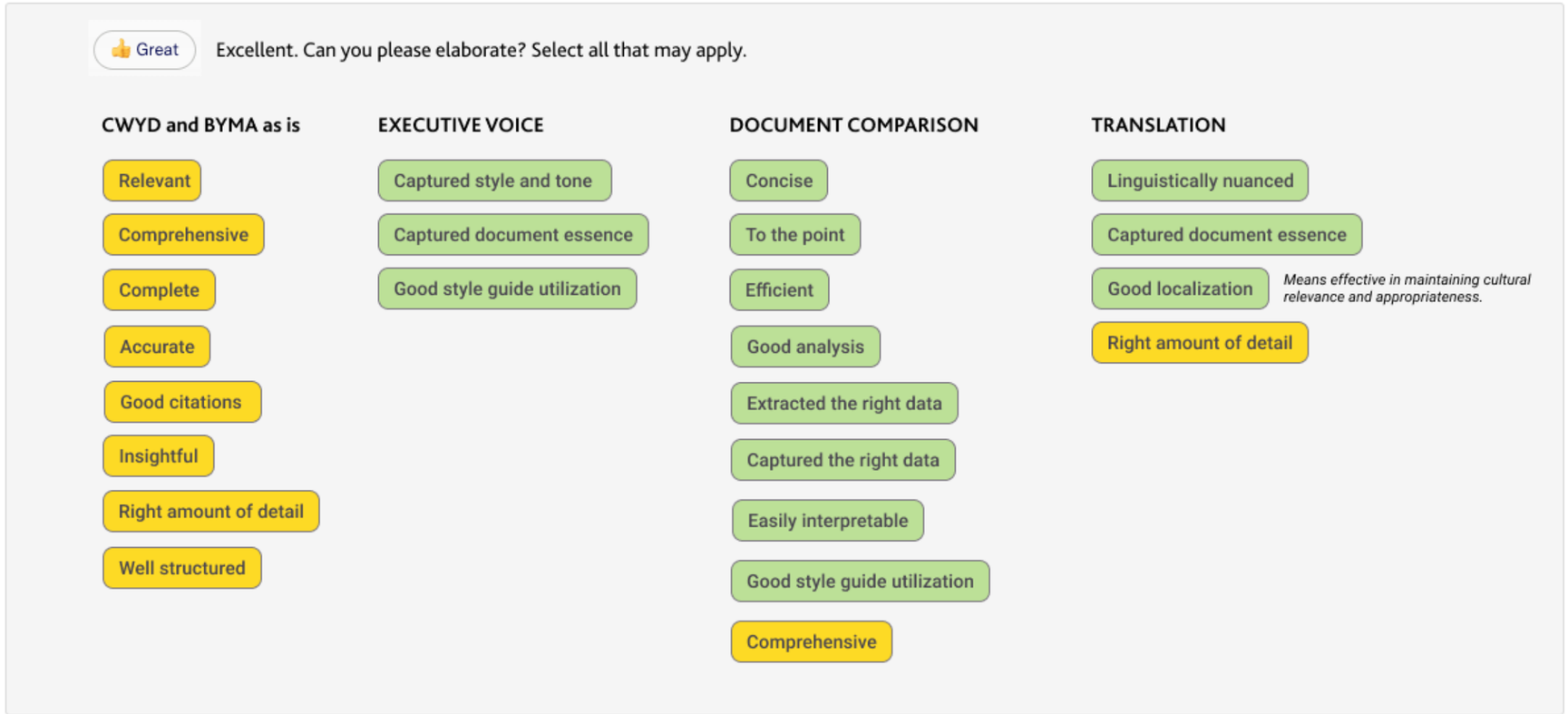
User feedback - content strategy options that Product Manager picked out. They were implemented as a shared component across 4 skills that all lent themselves well to this particular set of options. You can select multiple options. If you also select “Other”, you get free text input box.

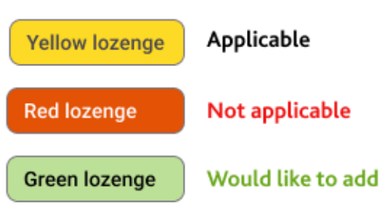
User feedback - next step was adding custom options to the skills that needed a custom component. I came up with these options = content strategy. Product Manager will pick from these options.

Whole Document Analysis

Whole Document Analysis dashboard description:

Use documents you upload to extract writing style and tone, and create a new draft, with a topic of your choice. This can be useful when writing executive, sales and marketing communications. Compare two documents, for example, an original contract and an addendum, and provide a list of differences. Translate a long document.





User feedback - next step was adding custom options to the skills that needed a custom component. I came up with these options = content strategy. Product Manager will pick from these options.

Code Interpreter

Code Interpreter dashboard Interpreter description:

Processes data, generates charts, runs calculations, and executes code. Works with most file types, including Excel, and provides clear process explanations.

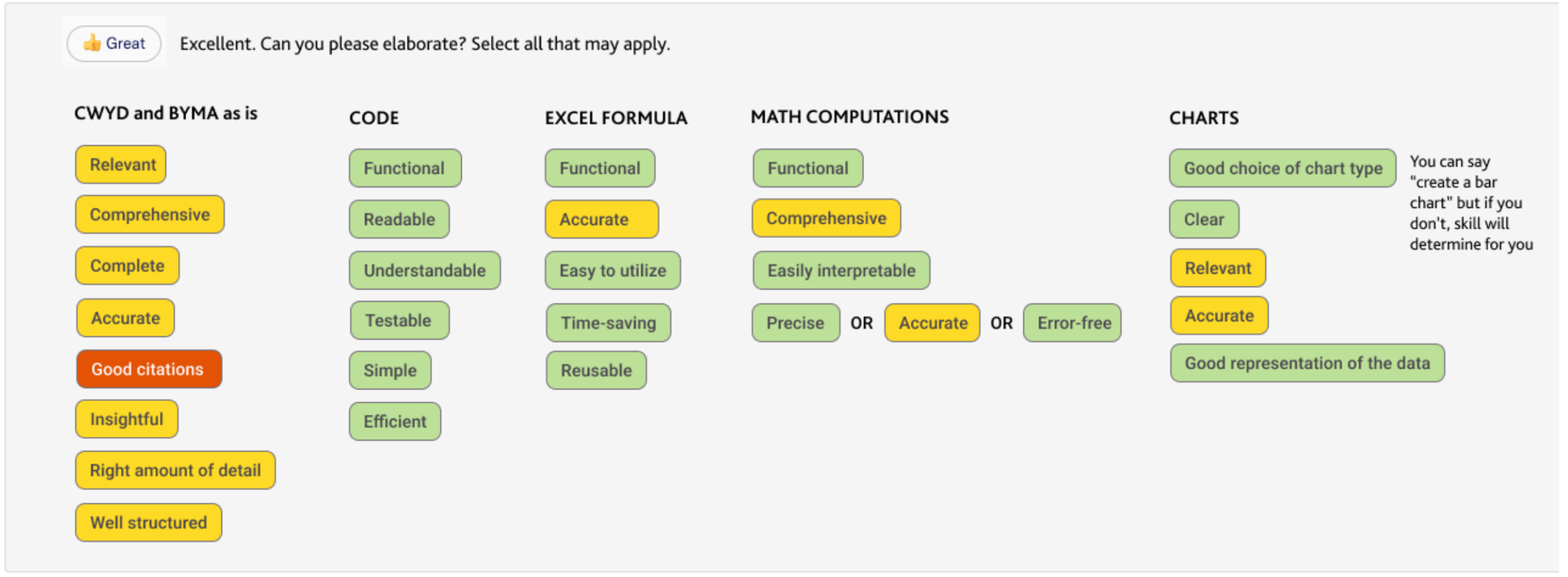
Code Interpreter skill page description:

What you can do in Code Interpreter: You can upload files and ask questions about them. Responses will be a combination of code and natural language. See less

- Ask Code Interpreter to do Math Computation for you.
- Ask Code Interpreter to create charts, based on the data from your uploaded Excel files.
- Code Interpreter replaced Data Analyzer. Data Analyzer was only able to respond to a single prompt at a time. Code Interpreter gives you an opportunity to have a continuous chat with your Excel files. Data Analyzer was only able to interact with a single Excel file. Code Interpreter can handle up to 20 files in a single thread.

Conversation history pertains:

Yes



Yellow lozenge — Applicable

Red lozenge — Not applicable

Green lozenge — Would like to add

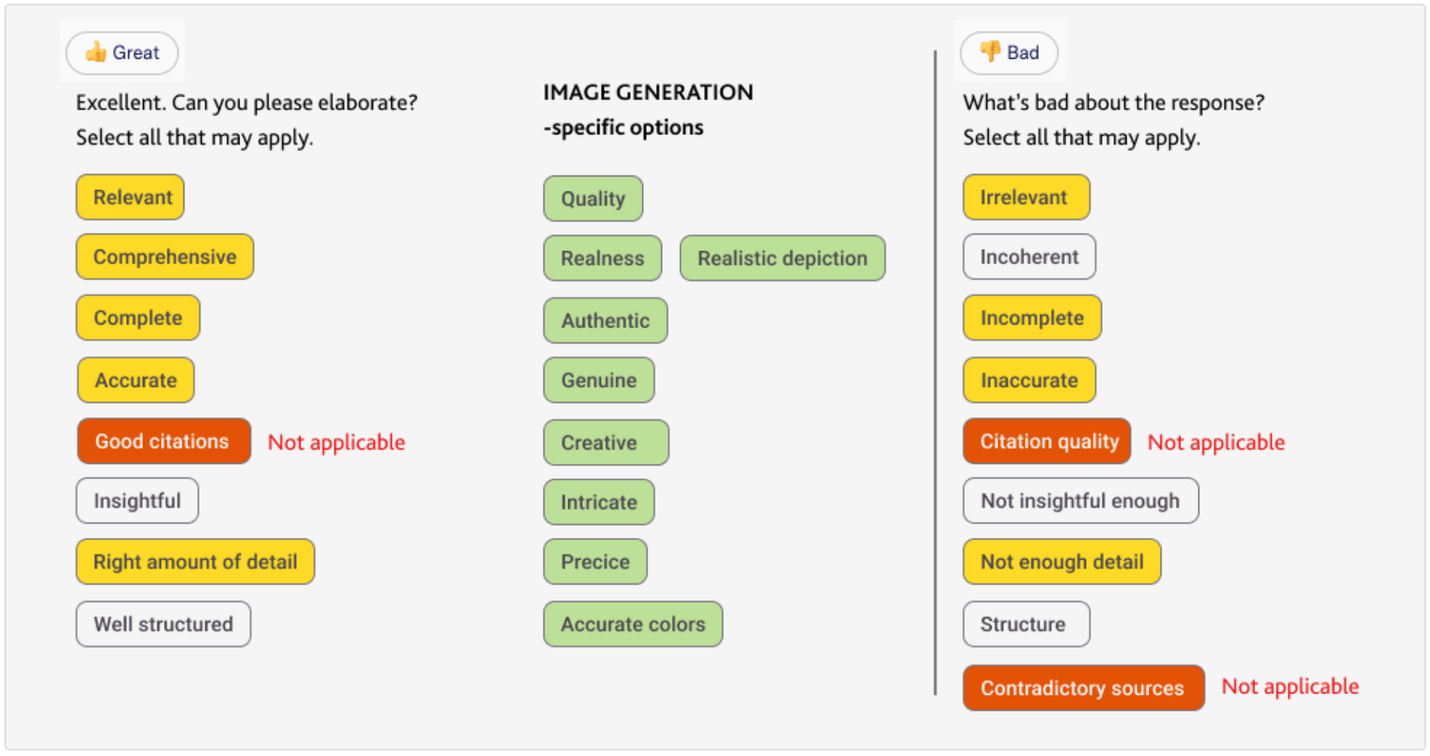
User feedback - next step was adding custom options to the skills that needed a custom component. I came up with these options = content strategy. Product Manager will pick from these options.

Image Generation

Image Generation dashboard instruction:
Create images, graphs, charts and diagrams from text. Useful in marketing, reports, websites, digital products, and presentations.

Image Generation skill page instruction:
What you can do in Image Generation: Use DALL-E to generate images, backgrounds, and data visualizations, such as charts and diagrams.

Conversation history pertains:
No



Yellow lozenge **Applicable**

Red lozenge **Not applicable**

Green lozenge **Would like to add**

User feedback - next step was adding custom options to the skills that needed a custom component. I came up with these options = content strategy. Product Manager will pick from these options.

Sandbox (akin to Open AI Playground)

Sandbox dashboard skill description:
Generate content. Summarize and analyze text. Classify, and categorize. Extract data and insights. Find patterns and themes. Translate to other languages.

Sandbox skill description:
Sandbox offers users the ability to explore content generation, summarization, classification, categorization, data extraction, translation and more using GPT models

Sandbox chat input box hint text:
Type here to ask Moody's anything, "Summarize the latest news about Tesla and how it may impact its credit".

Conversation history pertains:
Yes

Sandbox feedback from user research:

From Yelena's notes:

1. Users would like to be able to Save and Share in Sandbox.
2. Would like to know if the answer came from Moody's Copilot sources or generic sources.
3. General feedback:

- Would like pre-canned prompts
- Would like chat threads
- Would like to give feedback on speed
- Error messages. Document search failed. Request timed-out.

Sandbox feedback from user research:

CWYD prompt:
What is the overall feedback on the Sandbox? Present in bullet points. What's good about Sandbox, and what is bad?

Response:
Based on the research, here are some points about the Sandbox:

Good:
1. Users appreciate the ability to control parameters like temperature and frequency in the Sandbox, which allows for more customization[1].
2. The Sandbox is used frequently by some users, especially when they want long responses[1].
3. It allows users to iterate and refine their prompts to get better responses[2].

Bad:
1. Some users have experienced issues with the Sandbox, such as it timing out and not providing responses[3].
2. There is a lack of certain features in the Sandbox, such as the ability to save a master prompt[3].
3. Some users have found that the Sandbox does not always provide the desired results, leading to a need for multiple iterations[2].

Citations:
Chat with your Data interview transcripts_Feb_March_2024:
1. p11_jingyu_cwyd_bya-mp4-2024-03-11.pdf - Page 26
2. p15_jose_cwyd_bya-mp4-2024-03-06.pdf - Page 11

Additional comments:
Based on the research, here are some additional comments on the Sandbox:
1. Some users have found the Sandbox to be a useful tool for prototyping and debugging scripts[1].
2. Users have noted that the Sandbox allows them to have more control over the AI's responses, which they appreciate[2].
3. There have been instances where users have encountered error messages while using the Sandbox, leading to some confusion[3].

