Consultant

Administrator's Guide

Version: 1

Build date: May 28, 2024

Contents

1. What's new?

This section describes changes as of April 25, 2024.

Table 1-1 Changes made in the last update

TOOL	PAGE	DESCRIPTION
Administration panel	External chatbots	Added the ability to transfer data about tagged projects to external bots.
Administration panel	External chatbots	Added cards for external bots. Custom project settings have been added. The button for editing bots has been moved.
Administration panel	Chat history	The number of disputes in a chat inspection is limited to one.
Administration panel	Chat history	Saving the state of collapsible elements has been added.
Administration panel	Chat history	Added the **Has the customer's issue been resolved** filter.
Administration panel	Chat history	System messages within the chat are now displayed for all employee roles.
Administration panel	Chat history	Changed the display of the long response label.
Administration panel	Reports → Chat history report	A list of bot tags has been added to the chat information section. Renamed the **Tags** column to **Operator tags**.
Administration panel	Projects	Added the **Data retention periods** setting, which sets the storage period for information about chats in the project.
Administration panel	Statistics → Chatbot	Users with the *Restricted moderator* role now have access to the chatbot statistics section.
Administration panel, Workspace	Chat history	A service message with information provided by an external bot has been added.
Widget	Widget	Changed post-survey mechanics: the customer can answer whether their issue has been resolved no more than once. The request for a rating is sent after the chat is closed, not after pressing the “Mark resolved” button.

Table 1-1 Changes made in the last update

TOOL	PAGE	DESCRIPTION
Widget	Widget	Added the ability to manage sound notifications.
Workspace	Customer consultations	Added a button to pin the chat.

2. Introduction

The **Consultant** system was created to support customers. Customers contact us for help with technical issues, service issues, and errors, and to ask for additional information regarding their questions.

Consultant consists of three main parts:

1. The administration panel, which is a tool for managing the system. It stores employee data, chat history between operators and customers, statistics derived from these chats, the chatbot and the history of interactions with it, general information about sites connected to the system, reports on employee performance, etc.
2. A widget is a dialogue window with an online consultant that gets placed on websites. The functionality is also used in independent iOS and Android apps. Customers write their questions in the support widgets to get help from a consultant.
3. The operator workspace is the operator's work tool and is his or her office for consulting with customers. This is where the operator processes incoming requests from customers, tags (assigns topics) customer chats, leaves necessary comments, and also personalizes the work environment by customizing settings, creating and editing quick phrase templates, hotkeys, etc. The entire history of customer communications and their correspondence with operators is saved in a database and displayed in the administration panel.

Table 2-1 Addresses for accessing Consultant

Administration panel	• https://office.suphelper.com – for access outside the Russian Federation. • https://office.suphelper.ru – for access within the Russian Federation.
Operator workspace	• https://workspace.suphelper.com – for access outside the Russian Federation. • https://workspace.suphelper.ru – for access within the Russian Federation.
Support widget	On the system-integrated Consultant website.

The system supports the following languages:

- English
- Russian
- German
- French
- Spanish
- Portuguese
- Turkish
- Farsi
- Arabic
- Hindi

- Korean
- Japanese

3. Background

3.1. Widget

The customer contacts support via a widget on a website, in an app, through a Telegram bot, or through other channels. Depending on the method, the functionality available to the customer may differ.

Before reaching an operator, the customer receives service messages, interacts with a bot, and receives answers through it. If no suitable answer can be found, the customer is invited to reformulate the question, and a button to call the operator is displayed. If there is still no answer, the process of contacting an operator begins automatically.

The inquiry goes into a queue if there are online operators with the appropriate project, language, country of registration, and VIP customer service status.

If an operator with a suitable language is not found for the customer, the customer is prompted to choose from a list of alternative languages of the currently available operators. The selection process also accounts for the country of registration. After a language is chosen, an operator is selected. The selected language is only used for the current consultation. The customer cannot change the language while they are in the queue. If all operators with alternative service languages are busy, then after a partner-specific period the customer is shown system messages asking them to wait. After 59 minutes, if no new messages are received, the chat is closed.

The customer sees the status of the message: sending, sent, read. You can manage sound notifications, use emojis, and send files from your device or the clipboard.

After the chat is closed, the customer is asked to assess the consultation, indicate whether their issue was resolved, and give a rating from 1 to 5. The rating is considered only for both parameters: if only one is completed, then the rating is not taken into account.

See also

Editing a project

3.2. Operator shifts

An operator shift begins when the operator logs in to the system. A shift ends one hour after the operator logs out of the system. If the operator logs out, but the interval between logging out and logging back in is less than one hour, then the previous shift continues.

About one minute after closing the Workspace tab, the operator will go offline.

1.5 to 2 hours after the operator closes the Workspace tab or presses “Exit before shift ends”, the system will automatically close the shift. The system will automatically close the shift after one hour offline. Upon logging in, there will be no invitation to continue the shift. The end of the shift will be the date of the last activity, i.e. there won't be an extra hour. If an operator reenters the Workspace in two hours, he or she will start a new shift and the old one will close.

3.3. Allocating employee access

Roles, employee groups, and projects are mechanisms for allocating employees' access to various pages.

Tip:

For more information about employee groups, see Employee groups.

Access rights are allocated as follows:

- An ***administrator*** has full access, deals with settings for projects, languages, employees, employee groups, and the knowledge base, and gathers statistics. **A person with this role has access to all groups and all users, even if he or she is not a member of these groups. This is the only role that can create, edit, and delete groups.**
- A ***manager*** oversees moderators, inspects chats, and gathers statistics. **A person with this role has access only to the employees (and related content) with whom he or she shares group membership, according to the assigned role rights. A person with this role sees only the groups he or she is a member of.**
- A ***moderator*** oversees operators, inspects chats, and sees all customer interactions. **A person with this role has access only to the content of employees with whom he or she shares group membership, according to the assigned role rights. A person with this role sees only the groups he or she is a member of.**
- A ***restricted moderator*** oversees operators and inspects chats, but only for a restricted number of projects. **A person with this role has access only to the content of employees with whom he or she is part of the same project. The visibility of an employee with this role is limited to projects and related content. A restricted moderator does not have access to groups.**
- A ***senior operator*** oversees a team of operators with whom he or she shares group membership, participates in chat inspections, and gathers operator statistics. **A person with this role has access only to the content of employees with whom he or she shares group membership, according to the assigned role rights. A person with this role sees only the groups he or she is a member of.**
- An ***operator*** advises customers. **A person with this role has access only to the content of employees with whom he or she shares group membership, according to the assigned role rights. A person with this role sees only the groups he or she is a member of.**

Table 3-1 Access to pages depending on the employee's role

	ADMINISTRATOR	MANAGER	MODERATOR, RESTRICTED MODERATOR	SENIOR OPERATOR	OPERATOR
Statistics	✓	✓	✓	✓	✓
Statistics → Full stats	✓	✓	✓/✕	✕	✕
Statistics → Uploading projects	✓	✓	✕	✕	✕
Statistics → Operators → Closed shifts	✓	✓	✓	✓	✓

Table 3-1 Access to pages depending on the employee's role

	ADMINISTRATOR	MANAGER	MODERATOR, RESTRICTED MODERATOR	SENIOR OPERATOR	OPERATOR
Statistics → Operators → Operator time	✓	✓	✓	✓	✓
Statistics → Operators → Operator activity	✓	✓	✓	✓	✓
Statistics → Employees	✓	✓	✓	✕	✕
Statistics → Chatbot	✓	✓	✓	✕	✕
Reports	✓	✓	✓	✕	✕
Reports → Chat report	✓	✕	✕	✕	✕
Reports → Operator shift report	✓	✕	✕	✕	✕
Reports → Operator report	✓	✕	✕	✕	✕
Reports → Moderator report	✓	✕	✕	✕	✕
Reports → Chatbot intention report	✓	✕	✕	✕	✕
Reports → FAQ report	✓	✕	✕	✕	✕
Reports → Employee report	✓	✕	✕	✕	✕
Reports → Chat history report	✓	✓	✓	✕	✕
Reports → Chat file report	✓	✕	✕	✕	✕

Table 3-1 Access to pages depending on the employee's role

	ADMINISTRATOR	MANAGER	MODERATOR, RESTRICTED MODERATOR	SENIOR OPERATOR	OPERATOR
Reports → Inspection report	✓	✕	✕	✕	✕
Chat history	✓	✓	✓	✓	✓
Tags	✓	✕	✕	✕	✕
Employees → List of employees	✓	✓	✓	✓	✕
Employees → Employee groups	✓	✕	✕	✕	✕
Quick phrases	✓	✓	✓	✓	✓
Projects	✓	✕	✕	✕	✕
Chatbot	✓	✓	✕	✕	✕
Chatbot → Intentions	✓	✓	✕	✕	✕
Chatbot → Search configuration	✓	✓	✕	✕	✕
External chatbots	✓	✕	✕	✕	✕
Notifications	✓	✓	✓	✓	✓

4. Statistics

A menu section for visualizing the data for a period.

4.1. Full stats

A summary page for displaying key statistics.

By default, a summary of the past three days is displayed. The page contains filters for filtering by project, language, country of registration, and time frame.

The top of the page contains basic statistics.

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
Offered chats	The number of chats in which the customer or bot called an operator.	$OC = \sum D_{op}$, where D_{op} is a dialogue in which a customer or bot called an operator.
Handled chats	The number of chats that were closed as **Resolved** or **Answered**.	$HC = \sum (D_{Res} + D_{Ans})$, where D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator.
SL (Service Level)	% of requests processed within 300 seconds of being queued.	$SL = \frac{\sum (D_{ResFast} + D_{AnsFast})}{\sum (D_{Ans} + D_{Res} + D_{Mis})}$, where $D_{AnsFast}$ is a chat with the status **Answered**, which the first operator opened for the first time less than 301 seconds after its arrival.

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
		$D_{ResFast}$ is a chat with the **Resolved** status which the first operator opened for the first time less than 301 seconds after its arrival. D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Mis} —a chat with the **Missed** status that has been assigned to at least one operator.
AR (Abandonment Rate)	% of missed requests out of the total received.	$AR = \frac{\sum(D_{Mis})}{\sum(D_{Ans} + D_{Res} + D_{Mis})}$, where D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Mis} —a chat with the **Missed** status that has been assigned to at least one operator.

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
Missed from queue	% of requests missed from the queue.	$MisFQ = \frac{\sum(D_{MisNoOp})}{\sum(D_{Ans} + D_{Res} + D_{Mis})}$ where $D_{MisNoOp}$ is a chat with the **Missed** status where the customer or bot called an operator but no operator was added. D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Mis} — a chat with the **Missed** status where the customer or bot called an operator.
Missed by operator	% of requests missed by operators.	$MisOp = \frac{\sum(D_{Mis})}{\sum(D_{Ans} + D_{Res} + D_{Mis})}$ where D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Mis} —a chat with the **Missed** status that has been assigned to at least one operator.

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
Resolved contacts	% of requests with the **Resolved** status.	$ReCo = \frac{\sum(D_{Res})}{\sum(D_{Ans} + D_{Res})}$, where D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
AHT (Average Handling Time)	The average chat processing duration by support.  	$HT = Date_2 - Date_1$, where $Date_1$ — the time when the first operator reads the chat for the first time. $Date_2$ —the time when the chat is closed. $AHT = \frac{\sum(HT)}{\sum(D_{Ans} + D_{Res})}$, where HT —the period of time during which the chat was in progress. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
Response time	Average first response time.	$T_{Res} = Date_2 - Date_1$, where

Table 4-1 Key statistics

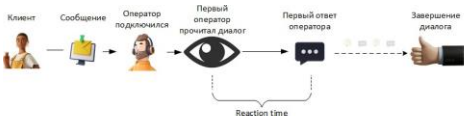
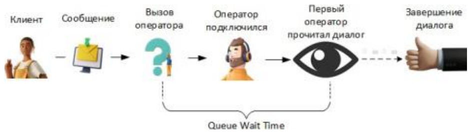
NAME	DESCRIPTION	FORMULA
		$Date_2$ —the time of the first operator's first message in the chat. $Date_1$ — the time of the first call to the operator by a bot or customer. $RT = \frac{\sum(T_{Res})}{\sum(D_{Ans} + D_{Res})}$, where T_{Res} — the time it took for the request to be queued and be read by the first operator. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
Reaction time	Average reaction time. 	$T_R = Date_2 - Date_1$, where $Date_2$ —the time of the first message from any operator. $Date_1$ — the time when the first operator reads the chat for the first time. $ReT = \frac{\sum(T_R)}{\sum(D_{Ans} + D_{Res})}$, where

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
		T_R —the time period between the first reading of the chat and the first response for chats with the **Resolved** and **Answered** status that were assigned to at least one operator. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
Close-wait Time	The average time until a chat closes.  	$T_{Cw}=Date_2 - Date_1$, where $Date_2$ — the time when the operator presses the **Mark as resolved** button. $Date_1$ — the time of the last message from the customer or operator in the chat. $CwT=\frac{\sum(T_{Cw})}{\sum(D_{Res})}$, where T_{Cw} is the time period from the last message in the chat to the pressing of the **Mark as resolved** button. D_{Res} is a chat with the **Resolved** status that has been assigned to at least one operator.
Queue Wait Time	The average time a chat waits in a queue for an operator.	$T_{QW}=Date_2 - Date_1$, where

Table 4-1 Key statistics

NAME	DESCRIPTION	FORMULA
		$Date_2$ — the time when the first operator reads the chat for the first time. $Date_1$ —the time of the first request to select an operator. $QWT = \frac{\sum(T_{QW})}{\sum(D_{Ans} + D_{Res})}$, where T_{QW} — the time period between the request to select an operator and the first reading for chats in the **Resolved** or **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.

In the middle of the page, there is a graph of chat resolutions with the service levels, handled chats, and abandonment rates.

Table 4-2 How the indicators in the graph are calculated

NAME	DESCRIPTION	FORMULA
SL (Service Level)	The number of chats processed within 300 seconds of being queued.	$SL_{count} = \sum(D_{ResFast} + D_{AnsFast})$, where $D_{AnsFast}$ is a chat with the **Answered** status which the first operator opened for the first time less than 301 seconds after its arrival.

Table 4-2 How the indicators in the graph are calculated

NAME	DESCRIPTION	FORMULA
		$D_{ResFast}$ is a chat with the **Resolved** status which the first operator opened for the first time less than 301 seconds after its arrival.
Handled chats	The number of chats that were closed as **Resolved** or **Answered**, whose processing took 300 seconds or more after being queued.	$HC_{count} = \sum(D_{ResSlow} + D_{AnsSlow})$ where $D_{AnsSlow}$ — a chat with the **Answered** status which the first operator opened for the first time more than 300 seconds after its arrival. $D_{ResSlow}$ — a chat with the **Resolved** status which the first operator opened for the first time more than 300 seconds after its arrival.
Abandonment rate	The number of missed requests where the customer or bot called an operator.	$AR_{count} = \sum(D_{Mis})$, where D_{Mis} a chat with the **Missed** status where the bot or customer called an operator.

Customer satisfaction statistics are displayed after the graph.

Table 4-3 CX metrics

NAME	DESCRIPTION	FORMULA
Number of customers	The number of customers who answered questions about the consultation quality.	$AoC = \sum D_{Rated}$, where

Table 4-3 CX metrics

NAME	DESCRIPTION	FORMULA
		D_{Rated} is a chat with the **Resolved** status which was rated by the customer.
RR (Response Rate)	% of customers who answered questions about the consultation quality.	$RR = \frac{\sum(D_{Rated})}{\sum(D_{Res})}$, where D_{Rated} is a chat with the **Resolved** status which was rated by the customer. D_{Res} is a chat with the **Resolved** status that has been assigned to at least one operator.
FCR (First Call Resolution)	% of customers who say their issue was fully resolved.	$FCR = \frac{\sum(D_{Resolved})}{\sum(D_{Rated})}$, where $D_{Resolved}$ is a chat with the **Resolved** status for which the customer indicated that his or her issue was resolved. D_{Rated} is a chat with the **Resolved** status where the customer answered whether his or her question was resolved.
CSAT (Customer Satisfaction Score)	% of customers satisfied with the consultation.	$CSAT = \frac{\sum(D_{Resolved})}{\sum(D_{Rated})}$, where $D_{Resolved}$ is a chat with the **Resolved** status for which the customer gave a rating of 4 or 5.

Table 4-3 CX metrics

NAME	DESCRIPTION	FORMULA
		D_{Rated} is a chat with the **Resolved** status for which the customer gave any rating.

At the bottom of the page, there are charts with customer support ratings. Applies to the chat as a whole, and not to a specific operator. On the left are answers to the question, "Did we resolve your issue?" (First Call Resolution). On the right, a bar chart with ratings from one to five is displayed, with the number of ratings in each category and a visualization of the Customer Satisfaction Score.

4.2. Uploading projects

A page for displaying project uploads.

The page provides filters for filtering by time, project, language, and country of registration.

Table 4-4 Project statistics

Chats in the queue	The number of chats in the queue.
Online operators	The number of operators working.
Paused operators	The number of operators who are on a shift but not online.
Offline operators	The number of operators who are not on a shift.

4.3. Operators

A menu item containing pages with operator statistics.

4.3.1. Closed shifts

A page for displaying the main statistics about closed operator shifts. The page has filters for filtering by time, group, and operator.

Table 4-5 Columns of the "Closed shifts" page

NAME	DESCRIPTION	FORMULA
Operator	Operator username and nickname.	
Shifts	List of shifts for the operator for the period	
Online time	The time during which the operator was in the "Online" status.	
Paused time	The time during which the operator was in the "Paused" status.	
Processed (Resolved +Answered)	The number of chats that were closed as **Resolved** or **Answered**.	$HC = \sum (D_{Res} + D_{Ans})$, where D_{Ans} —a chat with the **Answered** status. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator.
Resolved	The number of chats that the operator manually closed. Applies even if the operator has not sent a single reply to the customer in the chat. Banned chats are also considered resolved.	
Ignored	The number of chats in which the operator viewed at least one message, but did not leave a single reply to the client, did not close it manually, and did not transfer the chat to another operator.	
Missed	The number of chats in which the operator did not view the messages, did not leave a single reply to the client, did not close the dialog manually, and did not transfer the chat to another operator.	
Transferred	The number of chats that an operator has transferred to another operator.	

Table 4-5 Columns of the "Closed shifts" page

NAME	DESCRIPTION	FORMULA
No error	The number of chats for which the operator received a "No error" rating during an inspection.	
Recom mendation	The number of chats for which the operator received a "Recommendation" rating during an inspection.	
Error	The number of chats for which the operator received an "Error" rating during an inspection.	
AHT	The average chat processing duration by support.  	$HT = Date_2 - Date_1$, where $Date_1$ —the time when the first operator reads the chat for the first time. $Date_2$ —the time when the chat is closed. $AHT = \frac{\sum(HT)}{\sum(D_{Ans} + D_{Res})}$, where HT —the period of time during which the chat was in progress. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
Reaction time	Average reaction time.  	$T_R = Date_2 - Date_1$, where $Date_2$ is the time of the first message from any operator.

Table 4-5 Columns of the “Closed shifts” page

NAME	DESCRIPTION	FORMULA
		$Date_1$ is the time when the first operator reads the chat for the first time. $ReT = \frac{\sum(T_R)}{\sum(D_{Ans} + D_{Res})}$, where T_R — the time period between the first reading of the chat and the first response for chats with the **Resolved** and **Answered** status that were assigned to at least one operator. D_{Res} — a chat with the **Resolved** status that has been assigned to at least one operator. D_{Ans} —a chat with the **Answered** status.
Close-wait Time	The average time until a chat closes. 	$T_{Cw} = Date_2 - Date_1$, where $Date_2$ — the time when the operator presses the button **Mark as resolved**. $Date_1$ — the time of the last message from the customer or operator in the chat. $CwT = \frac{\sum(T_{Cw})}{\sum(D_{Res})}$, where T_{Cw} is the time period from the last message in the chat to the pressing of the **Mark as resolved** button.

Table 4-5 Columns of the "Closed shifts" page

NAME	DESCRIPTION	FORMULA
		D_{Res} is a chat with the **Resolved** status that has been assigned to at least one operator.
FCR	% of customers who say their issue was fully resolved.	$FCR = \frac{\sum(D_{Resolved})}{\sum(D_{Rated})}$, where $D_{Resolved}$ is a chat with the **Resolved** status for which the customer indicated that his or her issue was resolved. D_{Rated} is a chat with the **Resolved** status where the customer answered whether his or her question was resolved.
CSAT	% of customers satisfied with the consultation.	$CSAT = \frac{\sum(D_{Resolved})}{\sum(D_{Rated})}$, where $D_{Resolved}$ is a chat with the **Resolved** status for which the customer gave a rating of 4 or 5. D_{Rated} is a chat with the **Resolved** status for which the customer gave any rating.

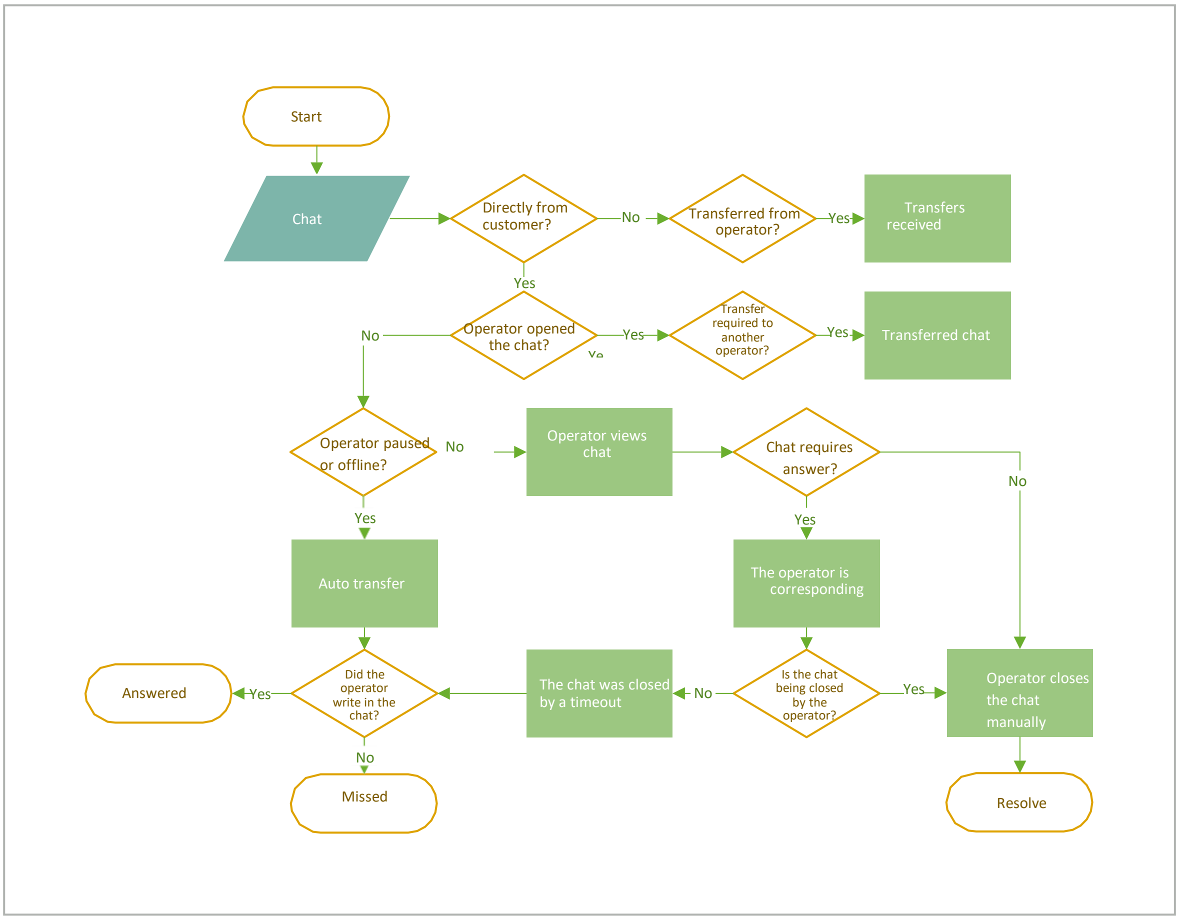


Figure 1 4-1 System for determining operator chat statistics

4.3.2. Operator time

A page with a table of statistics about the time that the operator has worked. The page has filters for filtering by time interval, group, and operator.

Table 4-6 Columns of the "Operator time" page

NAME	DESCRIPTION
Operator	Operator name and username.
Shifts	The number of shifts worked during the selected time period. The start date of the first and last shifts in the selection. Note: For a detailed view of shifts, press the number that reflects the number of shifts.
Worked	The number of hours worked.
Paused	The amount of time spent paused.

Table 4-6 Columns of the “Operator time” page

NAME	DESCRIPTION
Offline	The amount of time spent offline.

4.3.3. Operator activity

A page for viewing statistics about the distribution of operators' working hours.

- Periods the operator spent online are shown in green.
- Periods the operator spent offline are shown in gray.
- Periods the operator spent paused from work are shown in yellow.

Filters by date, project, language, device, group, and operators are available.

Table 4-7 Columns for operator activity statistics

NAME	DESCRIPTION
Operator	Operator's name (nickname) and username.
Status	Current status.
Chart	Visualization of the operator's statuses on a timeline.

4.4. Employees

Page for viewing statistics on employees with the **Administrator**, **Manager**, **Moderator**, **Restricted Moderator**, or **Senior Operator** roles. The page contains filters for filtering by employee and time interval.

Table 4-8 Columns of the “Employees” page

NAME	DESCRIPTION
Employees	Employee's nickname and username.
Shifts	Employee shifts by day (start and end of shift). Note: The shifts of employees with the **Operator** role are displayed at **Statistics** → **Operators** → **Closed shifts**.
Chats read	The number of chats that the employee opened.

Table 4-8 Columns of the “Employees” page

NAME		DESCRIPTION
Operators inspected		The number of chats rated by the employee.
Inspections conducted	Error	The number of chats with an **Error** rating.
	No error	The number of chats with a **No error** rating.
	Recommendation	The number of chats with a **Recommendation** rating.

4.5. Chatbots

A page for viewing the statistics of internal and external chatbots.

To select the bot you want to get statistics for, press the drop-down menu next to the header.

The page contains filters for filtering by project, language, country of registration, and time frame. There are several statistics at the top of the page.

Table 4-9 Chatbot statistics

NAME	DESCRIPTION	FORMULA
Offered chats	The number of chats with the bot.	$OC = \sum D_{bot}$, where D_{bot} is a chat in which the client interacted with the bot.
Resolved by bot	% of requests resolved by the bot without an operator's participation.	$ResByBot = \left(\frac{\sum D_{Bot_{Only}}}{\sum D_{Bot_{All}}}\right) \cdot 100$, where $D_{Bot_{Only}}$ is a chat involving a bot where an operator was not called.

Table 4-9 Chatbot statistics

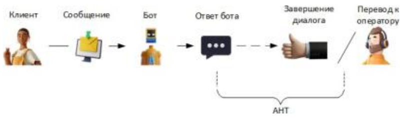
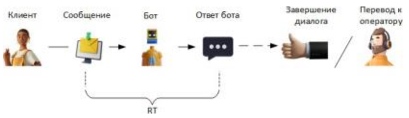
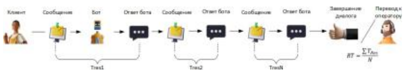
NAME	DESCRIPTION	FORMULA
		$D_{Bot\,All}$ is any chat involving a bot.
AHT (Average Handling Time)	The average time it takes for a bot to process a chat.  	$HT = Date_2 - Date_1$, where $Date_1$ —the time of the bot's first message. $Date_2$ — the time when the chat is closed or transferred to the operator. $AHT = \frac{\sum HT}{\sum D_{Bot\,All}}$, where HT the period of time during which the chat was in progress with the bot. $D_{Bot\,All}$ is any chat involving a bot.
Reaction time	The bot's average reaction time.  	$T_R = Date_2 - Date_1$, where $Date_2$ —the time of the bot's first message. $Date_1$ —the time of the customer's first message. $RT = \frac{\sum T_R}{\sum D_{Bot\,All}}$, where T_R is the time period between the customer's first message and the bot's first message. $D_{Bot\,All}$ is any chat involving a bot.

Table 4-9 Chatbot statistics

NAME	DESCRIPTION	FORMULA
Response time	The average time it took for the bot to respond. 	$T_{Res} = Date_2 - Date_1$, where $Date_2$ —the bot's response time. $Date_1$ —the time of the customer's message. $RT = \frac{\sum T_{Res}}{N} \div \sum D_{BotAll}$, where T_{Res} is the time period between the customer's message and the bot's response. N is the number of pauses. D_{BotAll} is any chat involving a bot.

There are two charts in the middle of the page: **Session criteria** and **Bot session status**.

Table 4-10 Session criteria

NAME	DESCRIPTION
Total	The number of chats with the bot.
Without operator	The number of chats where an operator did not need to be called.
With operator	The number of chats where the bot or client called an operator.

Table 4-11 Bot session status

NAME	DESCRIPTION
Total	The number of chats with the bot.
Answer received	The number of chats where the bot provided a list or a ready-made intention for all the customer's questions.

Table 4-11 Bot session status

NAME	DESCRIPTION
Partially answered	The number of chats where the bot provided a list or a ready-made intention for some but not all of the customer's questions.
No answer found	The number of chats where the bot failed to provide suitable intentions.

At the bottom of the page, there is a graph of the bot's performance over time as well as a chart of the **Top 10 tags**.

Table 4-12 Bot performance over time

NAME	DESCRIPTION
No answer found, without transfer to an operator	The number of chats where the bot did not provide a single answer to the customer's questions. An operator was not called.
No answer found, with transfer to an operator	The number of chats where the bot did not provide a single answer to the customer's questions. The customer or bot called an operator.
Partially answered, without transfer to an operator	The number of chats where the bot provided a list or a ready-made intention for some but not all of the customer's questions. An operator was not called.
Partially answered, with transfer to an operator	The number of chats where the bot provided a list or a ready-made intention for some but not all of the customer's questions. The customer or bot called an operator.
Answer received, without transfer to an operator	The number of chats where the bot provided a list or a ready-made intention for all the customer's questions. An operator was not called.
Answer received, with transfer to an operator	The number of chats where the bot provided a list or a ready-made intention for all the customer's questions. The customer called an operator.

Table 4-13 Top 10 tags

NAME	DESCRIPTION
Tag	A tag assigned by a bot.
Number	How many times the bot assigned the tag to chats during the selected period.
Share of the total number of tags	Usage of the tag as a percentage of the total number of tags.

5. Reports

Menu section for generating and downloading template reports. All types of reports, except for the chat history report, are available only to administrators. Until the report type is selected, the page displays the following text: *No data. You did not select a report type.* To start working with reports, select a report type from the general list of available report types:

- Chat report
- Operator report
- Moderator report
- FAQ report
- Employee report
- Chat history report
- Chat file report

Note:

The **Add** button is not available until the report type is selected. It is not displayed for the C*hat history report*. Pagination is available on the page. If no reports have been generated, the **No data** placeholder is displayed. The user can access the list of reports that he or she has generated.

After selecting the report type, a table appears with information on generated reports. It contains the columns described in the table below.

Table 5-1 Report columns

NAME	DESCRIPTION
Report name	Selection of available reports. The name of a chat history report is hyperlinked. Pressing the link opens a side menu.
Report period	1. Indicates the specified period for the report, formatted as mm.dd.yyyy - mm.dd.yyyy 2. Is not displayed for employee reports.
Report date and time	1. Is displayed only for chat history reports. 2. Is the date when the request to generate the report was sent, in mm.dd.yyyy hh:mm format.
Creation date	1. Displays the date when the report was generated, in mm.dd.yyyy format. 2. Sorting is available. 3. Is not displayed only for chat history reports.

Table 5-1 Report columns

NAME	DESCRIPTION
Status	*Preparation* • Indicates that the system has started generating the report. *Queued* • Indicates that the report is in the build queue. • A “Cancel” button appears next to reports with this status. *In progress* • Indicates that the system is in the process of building the report. • A “Cancel” button appears next to reports with this status. *Paused* • Is displayed only for chat history reports. • Is displayed when an employee has pressed the “Pause” button. *Error* • Indicates that an error occurred while building the report. • A “Retry” button appears next to reports with this status. • The button is not displayed for chat history reports. *Canceled* • Indicates that the report was canceled by an employee. • A “Retry” button appears next to reports with this status. • The button is not displayed for chat history reports.
Comment	• Is displayed only for chat history reports. • Displays the comment added when generating the report. • The maximum number of characters displayed is 50. • If there is more than 50, then the comment needs to be displayed.

5.1. Report types

5.1.1. Chat report

Table 5-2 Columns for chat reports

NAME	DESCRIPTION
Chat ID	The ID of the chat in the system.
First device	The first device the customer wrote from.
External customer ID	Logged-in customer ID.
Date and time when the chat arrived	When the chat was created.
Date and time when the customer first entered the queue	When the customer was first queued for assignment to an operator based on the project and language.
Date and time when the queued customer was first assigned to an operator	When the customer was assigned to an operator with a specific project and language. **Important note:** Only the chat's first assignment to an operator is taken into account.
Wait time	The time period during which the chat was in the queue until it was assigned to the first operator.
Time to open chat	The time period during which the chat was in the queue after being assigned to an operator.
First reaction time	The time of the operator's first response from the time of the customer's initial message.
Customer's country of registration	The country specified in the customer profile.
Last chat language	The most recent language used in the customer consultation.
Project	The project the customer came from.
Chat status	The chat status is based on the data on the **Chat history** page. A chat can have one of the following statuses: • In progress – the chat is not yet closed. • Missed – a missed chat.

Table 5-2 Columns for chat reports

NAME	DESCRIPTION
	• New – the chat is open and does not contain messages from operators. • Resolved – the chat is resolved. • Answered – the chat contains messages from the operator, but there is no resolution.
Number of messages (operator)	The total number of messages from operators in the chat.
Number of messages (customer)	The number of messages from the customer since an operator connected.
Number of the customer's messages with a bot	The number of the customer's messages before an operator connects.
Total number of operators	The number of operators who participated in the chat.
Who left the last message (customer/operator)	Who left the last message in the chat: the customer or the operator.
Chat length	The time from when the chat was opened by an operator to when it was closed.
Tags	First category + tag.
Username of the last operator	The username of the operator who was the last in the chat.
Did the operator help? (Yes/No)	The customer's response when assessing the operator's performance.
Customer rating (stars)	The customer's rating of the operator's performance.
VIP request	Whether the customer's profile had the VIP label at the time of the interaction.
Time from the last message in the chat to when it was closed	The time in seconds from the last message from the customer or operator until the chat was closed. If the customer presses on an intention that also counts as a message.
Banned	Was the customer assigned the “Banned” status during the chat?
Number of transfers in the chat (manual+system)	The number of manual and system transfers of the chat to other operators. +1 is also added in the following cases:

Table 5-2 Columns for chat reports

NAME	DESCRIPTION
	• Transfer of a chat with a language selection if no other operator was found. • Reconnection to the same operator. +1 is not added: • When transferring as a result of the operator logging out of the system.
Language of first message	The language set in the customer's device or application settings when the chat began.
Did the customer change the consultation language?	Did a window for changing the consultation language appear in the widget?
What language did the customer choose?	First language chosen by the customer from the list of available alternatives.

5.1.2. Operator shift report

Table 5-3 Columns for operator shift reports

NAME	DESCRIPTION
Operator (username)	Operator username
Date-1	The start and end of a shift on the first day of the period selected when generating the report.
Date-2	The start and end of a shift on the following day of the period selected when generating the report.
Date-N	The start and end of a shift on the last day of the period selected when generating the report.

5.1.3. Operator report

The report includes all chats for an operator shift that started and ended within the interval specified when generating the report. Shifts that started and ended earlier or later than the selected period are not added to the report.

Table 5-4 Columns for operator reports

NAME	DESCRIPTION
Operator (username)	The operator's username in the system.

Table 5-4 Columns for operator reports

NAME	DESCRIPTION
Shift start date (date +time)	The start date of the shift based on the specified filter period.
Working hours (shift duration)	The duration of the shift that matches the export filter. The time is expressed in seconds.
Resolved	The number of chats for which the operator status is “Resolved”.
Resolved + not banned + 0 messages from the operator	The chats where the operator marked them as resolved, did not ban the customer, and did not write a single message.
Number of bans	The number of chats where the operator banned the customer.
Answered	The number of chats for which the operator status is “Answered”.
Transferred	The number of chats that the operator manually transferred to another operator.
Number of missed chats	Indicates the number of chats missed by the operator.
Number of ignored chats	The number of chats ignored by the operator.
Total time before opening chats	The total time from the moment the customer is assigned to an operator until the operator opens the chat (chats whose status is Resolved + Answered) across all chats.
The time spent in the chat	The time period from when the chat was opened by an operator to when it was closed. **Note:** Only chats that were “Resolved” and “Answered” by the operator are taken into account
The time spent working in chats with the “Transferred” status	The total time across all chats from the opening of the chat by the operator until the transfer. Only the chats that were “Transferred” by the operator are taken into account.

Table 5-4 Columns for operator reports

NAME	DESCRIPTION
Time in the “Online” status	Indicates the amount of time when the operator was in the “Online” status.
Time in the “Paused” status	Indicates the amount of time when the operator was in the “Paused” status.
Total first reaction time	Sum of all first reactions – the period from the moment the operator opened the chat until the first message (from reading or opening the chat). Note: Only chats that were “Resolved” and “Answered” by the operator are taken into account
The sum of the time of first reactions for the “Transferred” status	Sum of all first reactions – the period from the moment the operator opened the chat until the first message (from reading or opening the chat). Note: Only chats that were “Transferred” by the operator are taken into account.
Total number of ratings during inspections for this operator	Indicates the number of all ratings during inspections for this operator.
Number of errors	Indicates the number of “Error” ratings that were given to this operator during inspections.
Number of recommendations	Indicates the number of “Recommendation” ratings that were given to this operator during inspections.
Number of “No error” ratings	Indicates the number of “No error” ratings that were given to this operator during inspections.
The number of chats where the operator tagged the customer	Indicates the number of chats where the operator assigned at least 1 tag.

Table 5-4 Columns for operator reports

NAME	DESCRIPTION
Number of chats in which the customer answered that the operator resolved the issue	Indicates the number of chats where the customer answered in the assessment form that the operator resolved the issue.
Number of chats in which the customer answered that the operator DID NOT resolve the issue	Indicates the number of chats where the customer answered in the assessment form that the operator DID NOT resolve the issue.
Number of chats with a customer rating of 4-5	Indicates the number of chats where the customer rated the operator's performance at 4 or 5 stars.
Total number of chats with a customer rating	Indicates the total number of chats where the client rated the operator's performance and gave it 1-5 stars.

5.1.4. Moderator report

Table 5-5 Columns for moderator reports

NAME	DESCRIPTION
Moderator (username)	The login of the user who set the first rating in the inspection.
Appeal date	When the first dispute (appeal) opened in the inspection was.
Rating date	When the first rating was assigned in the inspection was.
Appeal closing date	When the first dispute was closed.
Project	The project the customer came from.
Language	The language used in the customer consultation.
Operator username	The operator's username in the system.
Chat ID	The ID of the chat in the system.
Number of operator messages in the chat	The number of messages from the operator in the chat.
Chat creation date	When the chat was created.
First rating	The initial rating assigned during the inspection.

Table 5-5 Columns for moderator reports

NAME	DESCRIPTION
Tags	Tag categories and operator tags that were set in the chat.
Appealed	Indicates whether at least one dispute (appeal) was opened in the inspection.
The username of the person who gave the final rating	The username of the employee who had set the most recent rating when the report was exported.
Final rating	The rating set in the inspection when the report was exported.

5.1.5. Chatbot intention report

Table 5-6 Columns for the chatbot intention report

NAME	DESCRIPTION
Customer ID	The customer's identifier.
Project	The project the customer came from.
Language	The language set in the customer's application settings.
Country of registration	Customer's country of registration.
Date and time when the chat was created	When the customer sent the first message in the chat.
Name of the intention (question) that the customer selected	The name of the intention that the customer pressed.
Text of the answer for the intention that the customer selected	The answer for the intention chosen by the customer.

5.1.6. FAQ report

Table 5-7 Columns for FAQ reports

NAME	DESCRIPTION
Session ID	Indicates the session ID.
Device	Indicates the first device the customer used for contact.

Table 5-7 Columns for FAQ reports

NAME	DESCRIPTION
Language	Indicates the language used during the chat.
Project	Indicates the project used during the chat.
Date and time when the session was created	Indicates the date and time when the session was created.
Transferred to an operator (yes/no)	Indicates whether the customer was transferred to an operator during the session.
Top questions (if any)	Indicates the top questions viewed by the customer. If there are no top questions, the field remains empty.
Customer question for which options were not found in the knowledge base	Indicates all questions for which the customer did not find anything in the FAQ.
Top question 1 (the customer's selection)	Indicates the question that the client chose from the list presented by the bot.
Top answer 1 (the bot's answer to the selected question)	Indicates the answer displayed to the customer after selecting a question from the list presented by the bot.
Top question n	Each customer question is listed in a new column.
Top answer n	Each answer appears in a new column.

5.1.7. Employee report

Each item in the employee report starts from a new line. The more items for an employee, the more lines in the report

Table 5-8 Columns for employee reports

NAME	DESCRIPTION
Employee ID	The ID of the employee in the system.
Employee status	The status of the employee: Deleted, Active, Blocked.
Username	Employee username.
User nickname	The employee's nickname from the main user block in the employee profile.
Real name	The employee's real name from the main user block in the employee's profile.

Table 5-8 Columns for employee reports

NAME	DESCRIPTION
Role	User role.
Project	The project the user works in.
Language	The language set for the project when assigning the employee.
Country of registration	The country of registration set for the project when assigning the employee.

5.1.8. Chat history report

The content of the chat report is presented below.

Creation date: MM/DD/YYYY ([employee time zone]), [employee username]

Chat information:

Date and time when the chat was created: MM/DD/YYYY HH:MM ([time zone])

Customer: [customer number]

External customer id: [External customer id if logged in] Project: [name]

Lite version: [yes/no]

Chat ID: [chat uuid] Language: [name]

[(ISO code)]

Browser, OS: [browser version], [OS] Device: [device name]

Chat status: [status] Customer rating: [score]

Operator tags: [tag 1], [tag 2],... [n tag] Bot tags: [tag 1], [tag

2],... [tag n]

Consultants:

Consultant [Operator nickname 1]

Consultant [Operator nickname 2]

Consultant [Operator nickname n]

Chat:

Bot: [text]

If the bot's response contained buttons, display them below the bot's message, in the following format:

Buttons: [Button 1], [Button 2], [Button n]

Customer [customer number]: [customer message]

If it contains a file, there will be a link to the file [operator nickname] :

[operator message]

If it contains a file, there will be a link to the file. An auto-greeting is displayed as a

message from the operator

> **Note:**
>
> Each message contains the time it was sent.

5.1.9. Chat file report

Table 5-9 Columns for operator reports

NAME	DESCRIPTION
Period (start and end dates of the export)	Indicates the start and end dates for exporting the report.
Device	Indicates the first device the customer used for contact.
File type	Indicates the file format (file extension).
File size (MB)	Indicates the file size.

5.1.10. Inspection report

Table 5-10 Columns for inspection reports

NAME	DESCRIPTION
Chat ID	The identifier of the chat.
Current rating date	The date and time of the most recent rating as of when the report was exported.
Date when the first rating was confirmed or rejected	The date and time when the first rating was reviewed.
Date when the first dispute was opened	The date and time when the first dispute was opened.
Operator username	The username of the operator who was rated.
Duration of confirmation or rejection of the first rating	The difference between the date of the first rating to be inspected and the date when the next rating is set after the first verification. **Tip:** For example, if a rating subject to inspection is set on January 1, 2024 at 12:00 PM, verified on January 2, 2024 at 12:00 PM, and the next rating subject to inspection is set on January 3, 2024 at 12:00 PM, then the difference between verification and receipt of the next rating subject to inspection is two days.

Table 5-10 Columns for inspection reports

NAME	DESCRIPTION
Date when the first dispute was closed	The date and time when the first dispute was resolved.
Date of first rating	The date and time when the first rating was set.
Is the first dispute open?	Whether the first dispute is open.
Number of messages in the first dispute	The number of messages in the first dispute when the report was exported.
Inspection duration	The difference between the current rating date and the last rating date at the time the report was exported.
Current rating	The most recent rating at the time the report was exported.
Was the first rating subject to inspection confirmed or rejected?	The result of the first rating verification.
Duration of the first dispute	The difference between the dispute opening date and the date when the report was generated or the first dispute was closed.
Number of disputes in the inspection	The number of times a dispute has been opened in the chat.
Number of rating changes	The number of ratings that were changed by the assessor (only available to users whose ratings do not need to be reviewed).
Participants	Assessor usernames and roles.

5.1.11. Bot statistics

Table 5-11 Columns for chatbot statistic reports

NAME	DESCRIPTION
Chat ID	The identifier of the chat.
Bot name	The name of the bot.

Table 5-11 Columns for chatbot statistic reports

NAME	DESCRIPTION
Project	The project the customer came from.
Language	The language set in the customer's application settings.
Date and time when the chat was created.	When the customer sent the first message in the chat.
Date and time when the chat was ended	The time when the chat was closed or the time of the request to call an operator.
Session duration	The difference between the **Date and time when the chat was ended** and **Date and time when the chat was created** columns.
Bot session status	Whether there is an answer for the customer's request.
Operator requested	Whether the customer or bot called an operator.
Chat tags	Tags assigned to the chat by the operators who worked on it.
Number of customer iterations with intentions recognized by the bot	The number of messages to the bot after the bot displayed the message “Maybe you meant:” and displayed a list of intentions. There are also cases when the bot immediately displays a 100% match message.
Number of customer iterations with intentions not recognized by the bot	The number of messages to the bot after the bot displayed the message "Reformulate your question".
Reaction time	The time from the client's first message to the bot's first message in the chat.
Response time	The sum of pauses in the chat from the moment the client sends a message to the moment the bot responds, divided by the sum of such pauses in the chat.

5.1.12. Shift reports in Reddy

This report can be delivered to a Reddy user if the **Shift reports** option in the profile of an employee with the **Operator** role is set to **Send**. For more details, see Editing an employee.

The content of the report is presented below.

```
Shift report ID: [shift id] - [current page number]/[total pages] Employee: [Name]
Time format: UTC 00:00
Period: [month/day/year (hour:minute:second)] - [month/day/year (hour:minute:second)]
```

```
Online: [hours.minutes.seconds] Offline:
[hours.minutes.seconds] Paused:
[hours.minutes.seconds]

Project: [Name]

Chats: [Number] Resolved:
[Number] Answered:
[Number] Skipped:
[Number]
Ignored: [Number] Transferred:
[Number]

Time indicators:
Average reaction time: [hours.minutes.seconds] Average response
time: [hours.minutes.seconds]

// Days are converted to hours. Blocks about chats and time indicators are not displayed if they have no values or if their values
  are 0
```

> Example report
>
> ```
> Shift report ID: 657ae4aaf103bf1f433a3fd1 - 1/1 Employee: username:
> a.turing, nickname: Alan Turing Time format: UTC 00:00
> Period: 12/14/2023 (11:19:06) - 12/14/2023 (11:20:26)
> Online: 6h. 15m. 20s. Offline: 30m.
> 55s.
> Paused: 5m. 2s.
>
> Project: Save the World
>
> Chats: 10
> Resolved: 8
> Missed: 1
> Transferred: 1
>
> Time indicators: Average reaction
> time: 5s. Average response time:
> 10s.
> ```

5.2. Creating a report

The reports in the **Reports** section are mostly created in the same way, except for the following:

- Employee report – there is no need to select a period of time; all employees are exported.
- Chat report – exported on the **Chat history** page. For more details, see the Creating a chat history report section.

To create a report:

1. Go to the **Reports** page.
2. Select the report type:
    - Chat report
    - Operator report
    - Moderator report
    - FAQ report
    - Employee report
    - Chat file report
3. Press (**Generate report**). A window for generating a report will open.
4. Select the period for which you want to generate a report.
5. Press **Generate report**.

    Note:

    If several employees start generating reports at the same time, they will be generated on a first-come, first-served basis.

    The report creation process will begin. You can see the progress in the line with the report that is running. The page is updated automatically every 30 seconds.
6. To view report building progress, cancel a requested report, or download a finished report:
    a. Go to the **Reports** page.
    b. Select the report type:

        Note:

        If the line with the report does not show **Download report**, the report is not fully built or an error occurred during the build process.

    c. Find the line with the report you want.
    d. To cancel building the report, press **Cancel**.
    e. To download the report, press **Download**.

> Tip:
>
> If you selected to create a report and media files, then each file will be downloaded separately.

> WARNING:
>
> Do not close the browser tab until the download is complete. Otherwise, the download will be interrupted.

The report and chat files (if the **Download with media files** option was selected) will be downloaded.

f. If the download is interrupted, press **Restart**.

5.3. Downloading a report

To download a report:

1. Go to the **Reports** page.
2. Select the report type:
   - Chat report
   - Operator report
   - Moderator report
   - FAQ report
   - Employee report
   - Chat file report
3. Press **Download report** next to the report you want.

> Warning:
>
> Don't close the tab until the download is complete.

The report will be downloaded.

6. Chat history

A page with basic information about customer requests for the purpose of monitoring and controlling the quality of operators' conversations. The page displays customer correspondence with the bot and support operators. The following chat options are possible:

- The customer chatted with the bot and didn't call an operator.
- The customer chatted with the bot and then called an operator.
- The customer did not chat with the bot but instead immediately went to an operator.

The page provides the following:

- Search by chat and customer IDs, customer number, and message text. To search, type in the box at the top of the page and press *Enter*.
- Select the columns to display. To configure the columns, press and use the checkboxes to select the required columns. By default, the *Chat date and time, Chat status, Customer rating*, *Operators*, *Operator tags*, and *Bot tags* columns are displayed. The *Reaction time, Average response time, Maximum response time,* and *Issue resolved* columns are also available.
- Filtering chats for display. To filter, press and select the required options.

Table 6-1 Filters on the chat history page

NAME	DESCRIPTION	EXAMPLE VALUES
Time Interval	The date and time of the period for which data should be obtained.	12/11/2023 00:00 – 12/16/2023 23:59
Chat participants	Who the customer chatted with.	• Bot • Operator
List of chatbots	Which bots participated in the chat.	AI_bot
Chatbot status	The result of the customer's interaction with the bot. The filter does not depend on the chat status or whether an operator is participating in the chat.	• Answer received – the bot found an answer to all the customer's requests with options or a 100%-match with the original intention. • Partially answered – the bot was able to answer only some of the customer's questions. One or more questions were not answered.

Table 6-1 Filters on the chat history page

NAME	DESCRIPTION	EXAMPLE VALUES
		• No answer found – the bot could not find an answer to any of the customer's questions.
Chat status	The current status of the chat.	• Answered • Processing • Missed • New • Resolved
Message type	Whether the customer profile has the VIP label.	• VIP • Not VIP
Country of registration	The country set in the customer profile.	Angola
Project	The source of the chat.	Manhattan Project
Language	The language specified in the customer's application settings.	Russian
Device	The app or device the customer is using for contact.	App_iOS
Has the customer's issue been resolved	The result of the consultation quality survey.	• Yes • No • No answer
Customer rating	The rating set by the customer after the chat ends.	• 1 • 2 • 3 • 4 • 5 • Not rated

Table 6-1 Filters on the chat history page

NAME	DESCRIPTION	EXAMPLE VALUES
Operator tags	Tags set by operators.	California
Bot tags	Tags assigned by a bot.	Advancebet
Inspection status	Whether there is a dispute or whether an employee needs to verify the chat rating.	• Under dispute • Rating inspection required
Inspection rating	The rating set by an employee as a result of the chat inspection.	• Error • Recommendation • No error • Not rated
Employee filters		
Group	All employees in a group.	Northwest Division
Operator	List of operators participating in chats.	Alan Turing
Operator status	The status of the chat after interaction with the operator. Warning: The selection is available only when the **Operator** filter is filled in.	• Answered • Ignored • Missed • Resolved • Transferred
Assessor	Employees involved in inspections.	Dmitri Mendeleev

6.1. Creating a chat history report

You can upload information about chats, including customer data, the actual chats between the customer and operator and bot, and file attachments from the chats.

To create a report:

1. Go to the **Chat history** page.
2. Use filters. To do this, press and configure the required settings.

> **Warning:**
>
> To avoid poor export times, we recommend exporting no more than 50,000 chats at a time.

3. Press the **Reports** button.
   The **Generate report** window opens.
4. If necessary, in the **Generate report** window:
   a. Fill in the **Description** field to make it easier to identify the report in the general list.
      The content of this field will be displayed on the **Reports** page when you select the **Chat history report** report type.
   b. Select the **Include media files in the report** checkbox in order to include attachments uploaded by the operator and customer when the report is subsequently downloaded.
5. Press **Generate report**.

> **Note:**
>
> If several employees start generating reports at the same time, they will be generated on a first-come, first-served basis.

   The report creation process will begin. You can see the progress in the line with the report that is running. The page is updated automatically every 30 seconds.
6. To view report building progress, cancel a requested report, or download a finished report:
   a. Go to the **Reports** page.
   b. Select the report type:

   > **Note:**
   >
   > If the line with the report does not show **Download report**, the report is not fully built or an error occurred during the build process.

   c. Find the line with the report you want.
   d. To cancel building the report, press **Cancel**.
   e. To download the report, press **Download**.

Tip:

If you selected to create a report and media files, then each file will be downloaded separately.

WARNING:

Do not close the browser tab until the download is complete. Otherwise, the download will be interrupted.

The report and chat files (if the **Download with media files** option was selected) will be downloaded.

f. If the download is interrupted, press **Restart**.

6.2. List of chats

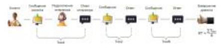
Customer No.	A permanent number assigned to the customer in the Suphelper system.
Chat status	A chat can have one of five statuses: • New: open + no reply from operator • Active: open + operator has replied • Resolved: closed + the operator pressed the button to mark the chat as resolved or the customer was banned • Answered: closed + chat timed out after reply was posted by operator • Missed: closed + no reply from operator, read or not read by the operator. Chat status The chat status is determined at the conclusion of the chat and may not coincide with the status of individual operators in the chat.
Reaction time	Time it takes the operator to post an initial reply to a customer query.
Average response time	Average time it takes operators to reply to the customer over the course of one chat.
Maximum response time	Longest interval between customer message and operator response during a chat.
Customer rating	The customer's rating of the service quality. Pressing “…” will display the customer's comment about the rating, if any.
The issue is resolved	The customer's answer to the question of whether support resolved his or her issue: Yes/No

Operators	Operators who participated in the chat. Hovering over "..." displays the operators' comments on the chat.
Tags	Tags assigned by the operators who worked on the chat.

6.3. Chats in full

Message text	The text of the customer's messages, the text of the operator's messages, the text of the bot's messages, the text of system messages, the long response label (if any).
Files	Files sent by the customer to the operator, files sent by the operator to the customer. JPG, JPEG, PNG, PDF, etc. files up to 100MB can be uploaded. The customer and operator can upload several files at a time (multi-attach is available), including by dragging and dropping, and displaying an image album. File multi-attach is not yet available in mobile apps.
Project	Project from which contact originated.
Chat ID	Number assigned to a chat in the system.
Date	Date and time chat was created – when the customer sent the first message in the chat.
Customer No.	A permanent number assigned to the customer in the Suphelper system. The ability to change the customer number to the customer's full name has been added for certain partners.
Customer ID	If the customer is authorized, their account number on the site from which they are writing will be shown here. If the customer is not authorized, no number will be shown.
Customer status	If the customer is a VIP, this fact is displayed next to the ID.
Metadata	Customer data: • The country of registration is the country that the customer specified as his or her country when registering on the site. It is displayed only if the customer came as a logged-in user. **Note:** Currently, this is not yet implemented on all devices. If it is not implemented for a device or if the customer arrives as a non-logged-in user, a dash ("-") will be sent in the country of registration field. • Country based on IP address – the customer's country automatically determined based on the customer's IP address when contacting support. If the customer is not in their country of registration or if the customer is using a VPN, the country of registration will not be the same as the country based on their IP address.

	• Phone number – the phone number of a logged-in customer will be sent in this field from the customer's devices. If the customer has provided a phone number, it will be displayed in this field. If the customer has not provided one (because the client is not logged in or for some other reason), the field will display a dash. • Device information formatted as follows: OS icon, browser or app, browser or app version, Consultant name and version. From left to right: Web, iOS app, Android app, Web mobile, Win client + EPOSes + self-service terminal, Telegram. **Note:** The customer can change this information on the website or in the application. This also changes the information in the administration panel, including in chats where the customer information was different.	
Language	The consultation language that the customer used when contacting support. It is assigned to the chat.	
Chat status	A chat can have one of five statuses: • **New:** open + no reply from operator • **Active:** open + operator has replied • **Resolved:** closed + the operator pressed the button to mark the chat as resolved or the customer was banned • **Answered:** closed + chat timed out after reply was posted by operator • **Missed:** closed + no reply from operator, read or not read by the operator. The chat status is determined at the conclusion of the chat and may not coincide with the status of individual operators in the chat.	
Bot tags	Tags assigned to the chat by a bot.	
Operator tags	Tags assigned to the chat by the operators who worked on it.	
Time indicators	Chat length	The duration of the chat from the time when the first operator first reads the chat to the moment the chat is closed.
	First response time	The duration of the chat from the moment the customer is put in the queue until the first message from an operator.
	Average response time	The average time it took for operators to respond during the chat. Formula:

		$T_R = Date_2 - Date_1$, where $Date_2$ — the time of the previous message from the customer, bot, or operator. $Date_1$ —the time of the operator's next message. $ART = \frac{\sum(T_R)}{Q}$, where T_R is the time period between messages from the customer or bot and messages from the operator. Q is the number of operators' messages in the chat.
	Maximum response time	The value of the highest response time.
Operators	This block displays the operators who participated in the chat and their inspection status. **Operator details:** • Operator nickname • Operator status for the chat *The chat status at the time when the operator finished working with the customer on the chat. This status will not always coincide with the final chat status, since this operator may have been followed by other operators who changed the chat status. Here we are talking about the chat status **resulting from the operator's work with the chat**.* • Inspection status + Chat inspection functionality • The rating given to the operator by the assessors **The operator status for a chat is not the same as the chat status. Several operators may work on the same chat. Each of these will have their own outcome depending on their work in the chat. The chat could be missed by one operator, resolved by another, and answered by a third, depending on the specific actions taken by each operator in the chat.**	

	• *Resolved* - closed + operator has hidden chat or customer was banned. • *Answered* - closed + chat timed out after reply was posted by operator. • *Transferred* - manually transferred to another operator. • *Missed* (closed + no reply from operator + not read by operator). The operator did not read a single message from the customer in the chat, the operator did not leave a single message in the chat, and the chat was not manually transferred to another operator. • *Ignored* (closed + no reply from operator + operator read at least one message in the chat). The operator read at least one message from the customer in the chat, the operator did not leave a single message in the chat, and the chat was not manually transferred to another operator.
Attachments	You can view uploaded images in a notification. When viewing images, you can switch between them using the arrow keys on the keyboard. The maximum number of images in a message is 10.

The lifetime of any chat is one hour from the moment of the last message from the operator or customer. When a chat is assigned to an operator, the chat lifetime is extended by one hour, which prevents operators from receiving chats that may be closed before the operator responds to the customer.

A chat can be pinned to the top of the operator's chat list. Doing this will not affect the chat lifetime.

When you scroll a chat by more than the window height, a down arrow appears, which lets you return to the last message.

6.4. Inspections

A chat inspection is the process of assessing the work performed by operators as part of a chat. One or more operators may in turn participate in a chat.

An inspection is performed on the **Chat history** page. Several filters are available to search for chats that should be inspected.

Table 6-2 Useful filters when searching for chats to inspect

FILTER NAME	DESCRIPTION	EXAMPLES
Time Interval	Chat creation date. If a period is selected, the results will include all the chats created during said period.	12/04/2023 00:00 – 12/07/2023 23:59
Chat status	The status of the chat or the result set by the operator.	Answered, In progress, Missed, New, Resolved
Project	Consultation platform.	myProject

Table 6-2 Useful filters when searching for chats to inspect

FILTER NAME	DESCRIPTION	EXAMPLES
Language	The website language or system language of the mobile device (iOS, Android) the customer used to make contact.	en
Device	The platform the chat came from.	Web, App_iOS, App_-Android, WebMobi, App_-Windows, Telegram
Customer rating	The customer's rating (1-5) of the service quality.	5
Tag	Tags that operators have added to the chat. If a chat has several tags, it will match the filter if one or more of them are specified.	Florida
Inspection status	The need to verify a rating or participate in a dispute.	• Under dispute – the chat has at least one inspection where there is an unresolved dispute. • Rating check required – at least one rating in the chat requires confirmation from a manager or administrator.
Inspection rating	A rating of the consultation by a moderator, restricted moderator, manager, or administrator. The filter will match if at least one rating in the chat has the selected status.	No error, Error, Recommendation, Not rated
Group	Employee groups.	Northwest Division
Operator	An employee with the **Operator** role.	Roger Dickens
Operator status	The result of the operator's work in a chat.	• Resolved • Answered • Transferred • Missed • Ignored

Table 6-2 Useful filters when searching for chats to inspect

FILTER NAME	DESCRIPTION	EXAMPLES
Assessor	An employee who has the ability to check inspections (moderator and above).	John Brown

A chat becomes available for inspection only after it is closed and all participating operators have completed their work. Active chats in which the customer’s query is still being answered are not available for inspection.

The work of each operator in the chat is individually assessed. There can only be two disputes in one inspection:

- *A dispute between a moderator or restricted moderator and a manager or administrator*.
- *A dispute between an operator, senior operator, and assessor.*

> **Note:**
>
> The assessor can be a moderator, restricted moderator, manager, or administrator, depending on whose rating will be final.

After the rating is assigned, the inspection (dispute) form is automatically closed and a notification is sent.

6.4.1. Operator

Sees only their own rating, not the ratings assigned by assessors to other operators. The operator does not see the names of assessors, only their role in the system. If the operator is not part of a group with a senior operator, they will see the inspection of their chat and will be able to open a dispute if they do not agree with the assigned rating. If an operator is part of a group with a senior operator, they will see the inspection of their chat, but only the senior operator will be able to open a dispute and participate in it if the senior operator does not agree with the rating assigned to the associated operator.

The operator may take part in one dispute with regard to an inspection:

- *A dispute with the assessor* (the assessor may be a moderator, restricted moderator, manager, or administrator, depending on whose rating will be final).

6.4.1.1. Opening a dispute

To open a dispute in the **Operator** role:

1. Use one of the following methods to search for rated chats:
   - Go to the **Notifications** page.
   - Find rated chats manually:

- Go to the **Chat history** page.
  - Press .
- In the **Inspection rating** field, select **Error** and **Recommendation**.

Chats with corresponding ratings will be displayed.

2. Go to a chat that you don't agree with.
3. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Show details**. A history of chat ratings changes will open.
4. Press **Open dispute**. A field for entering a comment will appear.
5. Enter a comment about the dispute.
6. Press **Start dispute**.
7. View updates in the dispute. To do this:
   a. Go to the **Chat history** page.
   b. Press .
   c. Select *Under dispute* in the **Inspection status** field.
   d. Go to the desired chat.
   e. The menu on the right will show the inspection history.

6.4.2. Senior operator

Sees their own ratings as well as the ratings assigned to operators in their group. Opens disputes and takes part in them when not in agreement with the rating assigned to their operators by the assessors. The senior operator does not see the names of assessors, only their role in the system.

The senior operator may take part in one dispute with regard to an inspection:

- *Dispute with the assessor*. The assessor can be a moderator, restricted moderator, manager, or administrator, depending on whose rating will be final.

6.4.2.1. Opening a dispute

To open a dispute in the **Senior Operator** role:

1. Go to the **Chat history** page.
2. Find ratings that need to be inspected. To do this:
   a. Press .
   b. In the **Inspection rating** field, select **Error** and **Recommendation**.
   Chats with corresponding ratings will be displayed.
3. Go to a chat that you don't agree with.
4. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Show details**. A history of chat ratings changes will open.
5. Enter a comment about an existing dispute or press **Open dispute**. A field for entering a comment will appear.
6. Enter a comment about the dispute.
7. Press **Start dispute**.
8. View updates in the dispute. To do this:

a. Go to the **Chat history** page.
b. Press .
c. Select *Under dispute* in the **Inspection status** field.
d. Go to the desired chat.
e. The menu on the right will show the inspection history.

6.4.3. Moderator, restricted moderator

Only sees the roles (without names) of the assessing managers and administrators.

If a moderator's rating has been checked by higher-level employees (administrator, manager), then this rating will not be available for editing by the moderator.

6.4.3.1. Enabling mandatory rating checks

When the **Inspect rating** setting is enabled, the moderator's ratings will not be displayed to the rated employees and included in the full stats until an administrator or manager verifies their rating.

Table 6-3 How the "Inspect rating" setting works

INSPECT RATING	THE RATING IS DISPLAYED TO THE RATED	THE RATING IS INCLUDED IN FULL STATS
On	✕	✕
On, rating verified	✓	✓
Off.	✓	✓

To enable mandatory checks of moderator ratings by higher-level employees:

1. Log in to the web interface of the administration panel as either a *Manager* or *Administrator*.
2. Go to the **List of employees** section.
3. Use filters or search to find an employee.
4. At the bottom of the left column, enable the inspect rating option for the selected moderator.

6.4.3.2. Inspection

To inspect using the **Moderator** or **Restricted Moderator** role:

1. Go to the **Chat history** page.
2. Find ratings that need to be inspected. To do this:

   a. Press .

   b. In the **Inspection rating** field, select **Not rated**. Chats without ratings will be displayed.

3. Go to the chat you want to rate.

4. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Rate operator**. A window for selecting a rating will open.
5. Choose one of the available ratings:
    - **No error** – for chats that have no comments.
    - **Error** – for chats in which a mistake was made.
    - **Recommendation** – for chats where the operator did not make an error but has a lot to work on.
6. Provide a comment about the rating, if necessary. The rating will be sent.

> **Warning:**
>
> If a moderator's profile has the **Inspect rating** option enabled, their rating requires verification by a manager or administrator. The rating before the inspection will not be included in the operator's statistics, but it will be included in the moderator's statistics.

7. To view updates in the chat history:
    a. Go to the **Chat history** page.
    b. Press .
    c. Select the appropriate value in the **Inspection status** field.
    d. Go to the chat.
    e. The menu on the right will show the inspection history.

6.4.3.3. Participation in disputes

A moderator, restricted moderator, manager, and administrator can both open and resolve disputes. To participate in a dispute:

1. Go to the **Chat history** page.
2. Find ratings that need to be inspected. To do this:
    a. Press .
    b. In the **Inspection rating** field, select **Error** and **Recommendation**. Chats with corresponding ratings will be displayed.
    c. Select *Under dispute* in the **Inspection status** field. All chats with an open dispute will be displayed.
3. Go to a chat that you don't agree with or one that is disputed.
4. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Show details**. A history of chat ratings changes will open.
5. To open a dispute:
    a. Press **Open dispute**.
    b. Enter a comment about the dispute.
    c. Press **Start dispute**.
6. To resolve a dispute:
    a. Review the details of the dispute.
    b. Enter a comment about the dispute.
    c. Press **Close dispute**.

6.4.4. Manager, administrator

They can see all the names of the inspection participants. They can check and change the rating given by any moderator, regardless of whether the **Inspect rating** option is enabled in their profile. They can change their rating.

Among all of them, only the rating given by the last manager or administrator will be included in the statistics.

The manager and administrator may participate in the following disputes as part of the inspection:

- *Dispute with a moderator* or *dispute with a restricted moderator* – if the moderator does not agree with the change in the rating.
- *Dispute with an operator* or *dispute with a senior operator* – if they do not agree with the operator's rating.

6.4.4.1. Inspection

The manager and administrator check the moderator's and restricted moderator's ratings. Above all, moderators whose profile has the **Inspect rating** option enabled should be checked, but the manager and administrator can check any rating, regardless of the state of that option.

To verify ratings in an inspection:

1. Go to the **Chat history** page.
2. Find ratings that need to be inspected. To do this:

    a. Press .

    b. In the **Inspection status** field, select **Rating inspection required**. Chats whose rating needs to be checked will be displayed.

3. Go to the chat whose rating you want to check.
4. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Show details**. A window with the history of ratings and disputes will open.
5. Review the details of the rating.
6. If you agree with the rating:
    a. Select **Confirm**.
    b. Press **Send**.
7. If you are not satisfied with the rating:
    a. Select **Reject**.
    b. Add a comment about the rating.
    c. Choose the more appropriate operator rating.
    d. Press **Send**.

6.4.4.2. Participation in disputes

A moderator, restricted moderator, manager, and administrator can both open and resolve disputes. To participate in a dispute:

1. Go to the **Chat history** page.
2. Find ratings that need to be inspected. To do this:

   a. Press .

   b. In the **Inspection rating** field, select **Error** and **Recommendation**.
   Chats with corresponding ratings will be displayed.

   c. Select *Under dispute* in the **Inspection status** field. All chats with an open dispute will be displayed.

3. Go to a chat that you don't agree with or one that is disputed.
4. At the bottom of the panel on the right, find the **Inspection** section and under the rating, press **Show details**. A history of chat ratings changes will open.
5. To open a dispute:
   a. Press **Open dispute**.
   b. Enter a comment about the dispute.
   c. Press **Start dispute**.
6. To resolve a dispute:
   a. Review the details of the dispute.
   b. Enter a comment about the dispute.
   c. Press **Close dispute**.

7. Tags

Section for creating and editing chat tags and tag categories. The created categories and tags are translated into the interface languages that are available in the system. The tag appears in its original language until it is translated.

Russian is considered the source language. Once created, a new tag is automatically sent to translators and they add translations for it. Tags are first translated into English. The timing for adding the localized tags depends on translators' overall workload as well as the number of tags added. To organize and better navigate the body of tags, tags are assigned to categories.

7.1. Adding a tag category

To add a tag category:

1. Go to the **Tags** page.
2. Press **Add category**. A window for adding a category will open.
3. Enter a category name.

   Restriction:

   The name must not:

   - be more than 30 characters long or less than 2;
   - be the same as an existing name.

4. Press **Add**.
   The tag category will be created.

7.2. Deleting a tag category

To delete a tag category:

1. Go to the **Tags** page.
2. Move tags out of the category you want to delete. To do this:

   a. Expand the + tag group.

   b. Press (edit) next to the tag.
   A window for editing a tag will open.

   c. In the **Category** field, select a category to move to.

   Note:

   The change is saved automatically.

   d. Press ✕ (close).

   e. Repeat the process for all tags in the category.

Deletion will be available.

3. Next to the category you want to delete, press (Delete). The tag category will be deleted.

7.3. Creating a tag

To create a tag:

1. Go to the **Tags** page.
2. Make sure that category for the tag has already been created. Use filters if necessary.

> Tip:
>
> For more information, see the Adding a tag category section.

3. Expand the + tag category.
4. At the bottom of the category, press **Add tag**.
   A window for adding a tag will open.
5. Enter a tag name.

> Restriction:
>
> The name must not be the same as an existing one.

6. Press **Add**.

7.4. Tagging a project

To add a project to a tag:

1. Go to the **Tags** page.
2. Expand the + tag category.
3. Next to the tag, press (**Edit**). A window for editing a tag will open.
4. Select a project in the **Projects** field.
5. Press **+ Add project**. The project will be tagged.
6. Press to close the window.

7.5. Untagging a project

To remove a tag from a project:

1. Go to the **Tags** page.
2. Expand the + tag category.
3. Next to the tag, press (**Edit**). A window for editing a tag will open.

4. Press next to the project.
5. Press to close the window.

8. Employees

A menu section for managing employees and employee groups.

8.1. List of employees

A page where you can create, view (), edit (), and delete () employee accounts.

Table 8-1 Columns of the "Employees" page

NAME	DESCRIPTION	EXAMPLE VALUES
Status	Employee workspace status.	• Online – the employee has logged in to the workspace and is not on a break. • Offline – the employee has not logged in to the workspace. All employees working in the administration panel will have this status. • Paused – the employee has pressed "Start break".
Employee	The name and username specified in the employee's account.	Alan Turing a.turing
Role	Role of the employee in the system.	• *Administrator* • *Manager* • *Moderator* • *Restricted moderator* • *Senior operator* • *Operator*

Table 8-1 Columns of the “Employees” page

NAME	DESCRIPTION	EXAMPLE VALUES
Status	Employee account status.	• Empty – the account is active. • Blocked – the account is blocked.

Table 8-2 Filters on the “Employees” page

NAME	DESCRIPTION	EXAMPLE VALUES
Group	A list of all groups in the system.	Northwest Division
Role	Role of the user in the system. Multiple values can be selected.	Administrator
Employee type	VIP customer service status.	• Serves VIPs • Does not serve VIPs • Serves everyone
Country of registration	The country of registration is set when the project is assigned to an employee. The operator will receive messages from users only from selected countries, if any are selected.	Argentina, Greenland, Bahamas
Project	The project the employee is working on. Only one value can be selected.	Project Mercury
Language	Working language of the employee. Multiple values can be selected. Employees who do not have a language set in even one place will also be included in the results.	en
Status	Employee activity status	• Deletion in progress • Blocked • Active

8.1.1. Viewing an employee card

The employee account contains information about the employee:

1. Go to the **Employees** → **List of employees** page.
2. Use filters to find an employee.
3. Press next to an employee name. This will take you to the employee card.
4. Review the employee information.

NAME	DESCRIPTION	EXAMPLE VALUES
Name	The name (nickname) of the employee. It may not be the same as their real name. This is the name that appears in the widget, workspace, and administration panel.	Alan Turing
Last seen	The last time an employee logged in.	a minute ago
Status	A visual element that appears in the block to the right of the photo when an employee has been blocked or is pending deletion.	◦ Empty – the employee is active, not blocked, and not pending deletion. ◦ Blocked ◦ To be deleted in: [time after which the employee will be deleted]
Username	A unique account name for authorizing an employee in the system.	v.kapustin
Real name	The name of the employee as it appears on their passport. This is displayed only in the employee card.	Veniamin Kapustin
Role	A set of permissions for accessing the system.	Operator
Password	A sequence of characters to authenticate a user in the system. Note: The current password cannot be viewed, but it can be changed.	rCRQ-eC7d1

NAME	DESCRIPTION	EXAMPLE VALUES
Two-factor authentication	The need for additional verification via Reddy when authenticating. On/off.	◦ Off – Authentication using a password. ◦ On – Authentication using a password and a one-time code from Reddy. Note: An active Reddy account is required to use the functionality
Shift reports	Whether to send reports about the work of an employee with the **Operator** role at the end of his or her shift.	◦ Send ◦ Do not send
VIP service	Whether the employee exclusively serves VIP customers.	◦ Off – serves all customers, regardless of their VIP status. ◦ On – serves only VIP customers.
Block	The ability to block an employee. This functionality can be used for blocking or before deletion.	◦ Blocked – the user is unable to log in to the system. ◦ Unblocked
Delete	The ability to permanently delete an employee. The permanent deletion of an employee and all associated data happens 30 days after the deletion is initiated.	◦ Active – the employee can perform all actions in the system according to his or her role. ◦ Marked for deletion – less than 30 days have passed since the deletion was initiated. The employee is unable to log in to the system.

NAME	DESCRIPTION	EXAMPLE VALUES
		◦ Deleted – the employee profile no longer exists.
Groups that employee is a member of	The communities that the employee belongs to.	Northwest Division
Projects	Projects assigned to the employee and the language settings, customers' countries of registration, and nicknames for the project.	Manhattan Project
Inspect rating	This functionality is only for moderators and restricted moderators. Determines whether assigned ratings must be checked.	◦ On – A ratings check is required. Prior to the check, the rating is not included in the statistics. ◦ Off – A ratings check is not mandatory; the ratings are included in the statistics immediately after they are assigned.

8.1.2. Creating an employee

There are two ways to create an employee:

1. from scratch
2. based on an existing employee's account

To create an employee:

1. Go to the **Employees** → **List of employees** page.
2. To create from scratch:

    a. Press + (**add employee**). A window for adding an employee will open.

    b. Select the employee's **Role**.

> **Note:**
>
> For more information on roles, see Allocating employee access.

c. Enter:
   - the employee's unique text identifier in the **Username** field
   - the name that will be displayed in the system in the **Name (nickname)** field
   - the **password** (and re-enter to confirm)

d. If necessary, add the **Employee real name**.

> **Note:**
>
> This name appears only on the employee card.

e. Press **Add**.

3. To create using data from an existing employee's account:

   a. Use filters to find an employee.

   b. Press next to an employee name. This will take you to the employee card.

   c. Press **Add based on existing employee**.

   d. Enter the username, name, and password.

   e. Change the role as needed.

   f. Press **Register**.

   An employee will be created with the selected role and assigned to the same groups and projects as the original employee.

8.1.3. Editing an employee

To edit an employee:

1. Go to the **Employees** → **List of employees** page.
2. Use filters to find an employee.
3. Press next to an employee name. This will take you to the employee card.
4. To change basic data:

   a. Press **Edit details**.
      The **Edit employee** window will open.

   b. Change the required details.

   c. Press **Save**.

5. To change the maximum number of chats allocated to an employee:
   a. Under the **Maximum number of chats in workspace** heading, press ⚙. The **Maximum number of chats in workspace** window will open.
   b. Select the desired number of chats.
   c. Press **Save**.
      The maximum number of chats in the employee's queue will change.
6. To enable two-factor authentication:
   a. Under the **Two-factor authentication** heading, press ⚙. The **Two-factor authentication** window will open.
   b. Select **Reddy**.
   c. Enter your Reddy user ID.

      Tip:

      You can copy the ID from the basic settings in Reddy.

      > Example: 12345678912.
   d. Press **Save**.
      When logging in, the employee will need a one-time code from Reddy in addition to the password.
7. To enable the sending of shift reports:

   Note:

   For more information on the content of the report, see the Shift reports in Reddy section.

   a. Under the **Shift reports** heading, press ⚙. A window for configuring sending reports will open.
   b. Select **Send to Reddy**.
   c. Enter your Reddy user ID.

      Tip:

      You can copy the ID from the basic settings in Reddy.

      > Example: 12345678912.
   d. Press **Save**.
      The specified employee will receive reports after each shift is completed.
8. To change an employee's VIP customer service status:

a. Press ⚙ under the **Service type** heading. A window will appear where you can select the service type.

b. Choose one of the following options:
   - **Serves VIPs** – the employee will be connected exclusively to VIP customers.
   - **Serves everyone** – the employee can serve customers with or without **VIP** status.
   - **Does not serve VIPs** – the employee will serve customers without **VIP** status.

9. To assign groups to an employee:

   a. In the **Groups that employee is a member of** panel, press **Add**. A window for assigning groups to the employee will open.

   b. Select groups.

   c. Press **Save**.

   The employee will be added to the specified groups.

10. To assign projects to an employee:

   a. In the **Projects** panel, press **Add**. A window for assigning a project to the employee will appear.

   b. Select a project.

   c. If necessary, select:
      - **Language** – to serve only the selected languages. If you don't select anything, the operator will serve all the languages in the system.
      - **Country of registration** – to serve only customers with the selected country of registration. If you don't select anything, the operator will serve all users from any country, including unregistered customers.

   > Warning:
   >
   > To ensure that any client can be assigned an operator, make sure that the project has operators that serve any country of registration. Otherwise, it may be impossible to assign unregistered customers to an operator.

   d. Enter the **project nickname** to change the employee's displayed name in the specific project.

   e. Press **Add**.

8.1.4. Blocking an employee

An employee's account is blocked in two ways:

- automatically if he or she hasn't logged in for one month
- manually

To block an employee:

1. Go to the **Employees** → **List of employees** page.
2. Use filters. To do this, press and configure the required settings.
3. Use filters to find an employee.
4. Press next to an employee name. This will take you to the employee card.
5. On the lower left side of the card, press **Block**.
6. Confirm the block.
   The employee will be blocked, and an appropriate indicator will appear next to the account image.

8.1.5. Deleting an employee

To delete an employee:

1. Go to the **Employees** → **List of employees** page.
2. Use filters to find an employee.
3. Press next to an employee name. This will take you to the employee card.
4. At the bottom left of the card, press **Delete**. A prompt will appear.
5. Click **OK** to confirm that initiation of the deletion.
   The employee will be marked for deletion. The employee can be restored within 30 days. After this period, the deletion will be permanent.

8.1.6. Unblocking and restoring an employee

After marking an employee for deletion, there is a 30-day period in which the employee can be restored along with all associated data.

To restore a deleted employee or unblock a blocked employee:

1. Go to the **Employees** → **List of employees** page.
2. Use filters to find an employee.
3. Press next to an employee name. This will take you to the employee card.
4. To unblock:
   a. At the bottom left of the card, press **Unblock**.
   b. Confirm the unblocking. The employee will be unblocked.
5. To restore an employee, press **Restore** at the bottom left of the card. The employee will be restored along with all associated data.

8.2. Employee groups

The section provides control by dividing employees into groups according to their zones of visibility and their rights in the system. It is a subsection of the **Employees** menu.

Administrators can create, view, edit, and delete groups.

8.2.1. Creating an employee group

To create an employee group:

1. Go to **Employees** → **Employee groups**.
2. Press (**Add group**).
   A window for creating an employee group will appear.
3. Enter the name of the employee group.
4. If necessary, add a group description.
5. Press **Add**.
   The employee group will be created.

8.2.2. Viewing an employee group

To view employee groups:

1. Go to **Employees** → **Employee groups**.
2. If necessary, use the search.
3. Press next to the employee group. You will be taken to the employee group.
4. View the list of employees in the group.

8.2.3. Editing an employee group

To edit an employee group:

1. Go to **Employees** → **Employee groups**.
2. If necessary, use the search.
3. Press next to an employee group. You will be taken to the employee group.
4. To edit the group name and description:
5. To change the membership of the group:

> Tip:
>
> You can also add or remove an employee from a group from the employee card. For more details, see Editing an employee.

   a. Press **Edit user list**. A window for changing the group membership will open.

   b. To add:
      - on the left side of the window, select employees to add to the group
      - press to add them to the group.

   c. To remove:

- on the right side of the window, select employees to remove from the group
- press to remove them from the group.

d. Press to exit the editing window.

The membership of the employee group will be changed.

> **Note:**
>
> It is also possible to change the group membership through the employee card.

8.2.4. Deleting an employee group

To delete a group:

1. Go to **Employees** → **Employee groups**.
2. Press next to an employee group. You will be taken to the employee group.
3. Change the group membership so that there are no employees in the group:

   a. Press **Edit user list**. A window for changing the group membership will open.

   b. On the right side of the window, select employees to remove from the group.

   c. Press to remove them from the group.

   d. Press to exit the editing window. The employees will be removed from the group.
4. Go back to the **Employee groups** page.
5. Next to the group you want to delete, press (**Delete**).
6. Confirm the deletion of the group.
   The employee group will be permanently deleted.

9. Quick phrases

This page contains text templates for answers to frequently asked questions. In the administration panel, you can only view and edit quick phrases: they are created exclusively in the workspace. Access to quick phrases is allocated as follows:

- The operator can view and edit the quick phrases that he or she created.
- A senior operator, moderator, and manager can view and edit the quick phrases of operators in his or her group.
- A restricted moderator can view and edit the quick phrases of operators who are assigned to the same project as he or she is.
- An administrator can view and edit the quick phrases of all employees in the system.

9.1. Editing quick phrases

To view and edit quick phrases:

1. Go to the **Quick phrases** page.
2. Next to the page heading, in the drop-down menu, select the employee whose quick phrases you want to view.
   A list of quick phrases in the employee's categories and projects will appear.
3. Press **Edit** under the description of the quick phrase.
4. Change the required settings.
5. Press **Save**.

10. Projects

This section lets you view, create, edit, and delete projects. Each project is a consultation platform.

You can assign tags to the project and add auto-greetings, which are short messages that the customer will see when contacting us and in messengers.

Table 10-1 Columns on the "Projects" page

COLUMN	DESCRIPTION	EXAMPLE VALUES
Name	The text identifier for the project. As a rule, a website's domain name is used as the name.	Manhattan Project
ID	A unique identification number that is automatically generated when creating a project.	46da2d332a6b4727b694351
Status	Project status. A project can be temporarily blocked if its activity needs to be temporarily stopped. A blocked project will not receive chats. Customers will be notified via chat that the support team is temporarily unavailable.	• Active • Blocked

10.1. Creating a project

To create a project:

1. Go to the **Projects** page.
2. Press + (**Add project**).
3. Enter:
    a. The project name is most often the same as the website's domain name.
    b. Ref/Group – the website's referral number in the system and the group number.

> **Tip:**
>
> To find out what it is, contact the project's developers or management.

4. If necessary, fill in the following:

a. Identification phrases – key phrases for marking that an operator's messages belong to a particular project.

> **Note:**
>
> If these phrases are filled in for a project, then if the operator of another project tries to send a message containing similar identification phrases to the customer, they will see a warning that this text relates to another project. The message will be sent only after the operator closes the warning window.

> For example:
>
> 1. The first consultation platform is given identification phrases a, b, c.
>
> 2. The operator tries to respond with a or b to the customer from a second platform.
>
> 3. The operator of the second platform should be notified that he or she is using identification phrases for the wrong platform and the text of this identification phrase should be highlighted.

a. Description – important information about the project, for example, information about the manager who oversees the project or the specifics of the project.

5. Press **Add**.

> **Note:**
>
> To start the project after it is created, you must send the project name along with this id to webmasters and mobile users. So they can link it to the corresponding ref (website). In this case, it is also desirable to specify the external id of the website and the id of the group it belongs to in the shared system, because the website names may coincide, and then they can be correctly distinguished by their refs id and group id in the external system.

The project will be created.

10.2. Editing a project

To view and edit a project:

1. Go to the **Projects** page.
2. Use filters. To do this, press and configure the required settings.
3. Next to the project name, press . You will be taken to the project card.
4. To change the basic project details:
   a. Press **Edit details**.
   b. Change the required details.
   c. Press **Save**.
5. To change the storage period for project-related data:

a. Next to **Data retention periods**, press ⚙. The **Data retention period** window will open.

b. Select the storage period: **Years** or **Days**.

c. Enter a period.

d. Press **Save**.

The storage period for project details will be changed.

6. Tag a project:

> Note:
>
> For more information on managing tags, see the Tags section.

a. On the **Available tags** tab, press **Edit**. A window for tagging the project will open.

b. Select tag groups or individual tags to assign to the project.

c. Press **Save**.

The tags will be added to the project. The selection of tags will become a necessary action for operators to perform in order to mark the chat as resolved.

7. Add an auto-greeting:

> Note:
>
> An auto-greeting is the first message a customer receives when an operator connects. Before chatting with an operator, the customer may chat with a bot, which also has a greeting, but its greeting cannot be configured.

a. Go to the **Auto greeting** tab.

b. Press **Add**.

c. Select an auto-greeting language from the drop-down list.

d. Enter the auto-greeting text.
This text will be displayed to customers whenever they make contact.

e. Press **OK**.

8. Select the languages that may be displayed to the customer in the widget if no operators with the customer's language are found:

a. Go to the **Alternative language list** tab.
b. Press **Edit list**.

c. Select up to 6 languages.
d. Press **Save**.

The list of alternative languages will be available to the customer if operators who support these languages are available at the time of the consultation.

10.3. Linking a support chat in Telegram

You can add one Telegram support chat to each project. It is created through a Telegram bot, but from the system's point of view, it is simply a chat where customers write directly to operators, just like a widget. Customer messages in this Telegram chat will be sent to operators in the workspace along with messages from the widget, but for them Telegram will be indicated on devices.

To set up receiving messages from Telegram:

1. Create a Telegram bot:

   a. Sign in to Telegram using a corporate phone number.

   > **Note:**
   >
   > This is necessary to maintain access to the bot in the event of unforeseen circumstances.

   b. Find the @BotFather bot and press **Start**.

   c. Enter the `/newbot` command.

   d. Enter the **bot name**.

   > **Note:**
   >
   > This name will be displayed in contacts and chats.

   e. Enter the bot's short name (username) for searching on Telegram.

   > **Important note:**
   >
   > The short name must consist of Latin letters, underscores, and numbers, and must consist of at least 5 and a maximum of 32 characters. The name must end with
   > “bot”, e.g. “tetris_bot” or “TetrisBot”.

   Botfather will send a message with a **token** (the key to access our bot).

   f. Copy the token.

   > **Tip:**
   >
   > To change the bot settings, you can use the following commands:

COMMAND	DESCRIPTION
/setname	Change the bot name.
/setdescription	Change the bot description, which is a short text describing the bot.
/setabouttext	Edit the bot info.
/setuserpic	Change the bot avatar.
/deletebot	Delete the bot and its username.

2. In the Consultant administration panel:

a. Go to the **Projects** page.

b. Use filters. To do this, press and configure the required settings.

c. Next to the project name, press . The project card will open.

d. Go to the **Messengers** tab.

e. Press **Add**.
A window for adding a messenger will appear.

f. Select **Telegram** in the list.

g. Enter the bot name.

h. Paste the token.

i. Press **Add**.

Users will now be able to receive messages from Telegram.

10.4. Blocking a project

To block a project:

1. Go to the **Projects** page.
2. Use filters. To do this, press and configure the required settings.
3. Next to the project name, press .

> **Note:**
>
> Blocking is also available from the project card.

4. Confirm the blocking of the project.

   The project will become unavailable for use.

11. Chatbots

A section for managing the Consultant system's internal chatbot.

When a chatbot is connected to a project, by default, it is displayed to the customer before an operator is connected.

The chatbot's content is monolingual. It will be displayed in the language the question is written in and the linked support language. If you create a question for the test.com project in Russian and link it to Russian, the question will be displayed in *Russian* in the chatbot *only for this project*. **The bot's content is not automatically translated into other languages.** If we want to create a similar question in the same project but this time in English, then we will need another question, which we will have to create separately.

The chat history contains the history of customer calls to the bot. The chat with the bot and the chat with the operator are the same chat. In the workspace, the operator sees the questions that the customer asked the bot and the answers that the bot gave the customer.

11.1. Intentions

A page for storing the content of an internal bot. The content of an internal bot is general text information covering customers' most frequent questions about websites and services.

Table 11-1 Columns of the "Intentions" page

NAME	DESCRIPTION
First key phrase	The key phrase that is listed first in the intention.
Linked to	Projects that the intention is linked to.
Views	The number of views of the intention content.

Table 11-2 Filters on the "Intentions" page

FILTER	DESCRIPTION	EXAMPLE VALUES
Project	Consultation platform.	Manhattan Project
Language	Language details passed via the device to the client.	en
Country of registration	The country set in the customer profile.	Argentina

11.1.1. Creating an intention

To create an intention:

1. Go to **Chatbot** → **Intentions**.
2. Press + (**Add intention**).

A window for creating an intention will open.

3. Fill in the following intention parameters:

   a. Project – the consultation platform that the intention will be added to.

   b. Language – the language setting on the customer's device or in the customer's application. The language must correspond to the one in which the answer is written. A selection of several languages is available.

   c. Country of registration – the country set in the customer's profile.

   d. Key phrases – questions that the customer will ask the bot in order to get the intention.

   > Note:
   >
   > To add more phrases, press **Add another phrase**.

   e. Response type – the reaction to a key phrase sent by the customer to the selected project.

RESPONSE TYPE	DESCRIPTION
Text	A text response to the customer, which will be displayed as a message from an operator.
Call an operator	Automatic redirection of the request to an operator.
Call a remote procedure	A transition from the content of the Consultant's internal bot to the content of a third-party bot (not an external bot). To this question, the customer will receive an answer that will be provided by a third-party content bot. However, the internal bot continues to work with the customer. The bot downloads only the answer to this specific question from the third-party bot. Note: Third-party content bot developers can find documentation on integrating their bot into the Consultant system here.

4. Press **Save**.

   The intention will be created and linked to a specific project and language.

11.1.2. Editing an intention

To edit an intention:

1. Go to **Chatbot** → **Intentions**.
2. Use filters. To do this, press and configure the required settings.
3. Press (**Edit**).

4. Change the required settings.
5. Press **Save**.

11.1.3. Copying an intention

To copy an intention:

1. Go to **Chatbot** → **Intentions**.
2. Use filters. To do this, press and configure the required settings.
3. Press (**Copy**).
4. Press (**Add intention**). A window for creating an intention will open.
5. Press *Ctrl+V* to paste the copied project data.
6. If necessary, change the settings for the new project.
7. Press **Add**.
   A new project will be created with data copied from the existing project.

11.1.4. Deleting an intention

To delete an intention:

1. Go to **Chatbot** → **Intentions**.
2. Use filters. To do this, press and configure the required settings.
3. Next to the intention you want to delete, press (**Delete**).
4. Confirm the deletion.
   The intention will be permanently deleted.

11.2. Search configuration

A page for configuring the mechanism by which the bot selects content in response to customer requests for each consultation language. The mechanism chosen in the configuration depends on what the customer must enter in order to receive the bot's response and how precisely the bot will select the response to the customer.

11.2.1. Creating a search configuration

To create a search configuration:

1. Go to the **Search configuration** page.
2. Press (**Add configuration**). A window for adding a configuration will open.
3. Fill in the following parameters:
   a. **Name** – a text identifier for the configuration.
   b. **Language** – the language setting that the configuration will apply to.
   c. Query parsing
      - **By character** – each individual symbol will be considered separately.
      - **By word** – space-delimited combinations of characters will be considered.

> When parsing by character, the query **"士人"** will match the **"刪士個人信息"** and **"人冊士"** articles. Parsing by character is recommended for languages where one character can represent a whole word, such as in Chinese languages.
>
> When parsing by word, the query “delete account” will match the “Delete my account” and “Duplicate account delete” intentions. This type of parsing is suitable for European languages.

d. **Fragment match percentage** – the required match level between the query fragment and a heading fragment.

> For example, when the match rate is set at 60%, the query “deleee me accomr” will match the “Delete my account” intentions, despite the errors in the query.

e. **Fragment group weight multiplier** – for each fragment, a multiplier will be applied to the basic group weight, starting from the third fragment.

> For example, the “delete personal information” query in the “Delete personal information from all projects” article will apply a multiplier once to the basic weight of the fragment group.

f. **Absolute search threshold** – the required match level between the customer's query and the intention's keywords.

> Note:
>
> The value must be greater than or equal to the **Fragment match percentage** field.

g. **Number of search results** – the maximum number of intentions that can be displayed to a customer in response to a query.

4. Press **Add**.
   An intention search configuration will be created.

11.2.2. Editing a search configuration

To edit a configuration:

1. Go to the **Search configuration** page.
2. Use the search at the top of the page.
3. Next to the desired configuration, press (**Edit**).
4. Change the required settings.
5. Press **Save**.

11.2.3. Deleting a search configuration

To delete a configuration:

1. Go to the **Search configuration** page.
2. Use the search at the top of the page.
3. Next to the desired configuration, press (**Delete**).

4. Confirm that you want to delete the search configuration. The search configuration will be permanently deleted.

12. External chatbots

A page for managing the links of external chatbots that connect to projects and entirely replace the Consultant's internal chatbot. If an external bot is connected to a project, then the Consultant's internal bot for the project does not operate at all. Instead, everything that the customer sees in the widget is managed by the external bot.

The following information is sent to external bots:

- Client message – message text, media files, device, current language, project ID, customer profile information.
- Operator call – project ID, customer profile information.
- Message primacy – project ID, customer profile information.
- Tags available in projects – project ID, tag ID, tag name in the operator's language.

The following information can be obtained from an external bot:

- Bot response to customer – message text, media file, response type (full response, partial response, no response), tag IDs.
- Call an operator into the chat.
- Bot message to operator (message text, media file).

External bot developers can find documentation on integrating their bot into the Consultant system here.

Table 12-1 Columns on the "External chatbots" page

Name	The name of the external chatbot.
Linked to projects	The projects that the external chatbot is connected to.

12.1. Creating an external chatbot

To create an external chatbot:

1. Go to the **External chatbots** page.
2. Press + (**Add chatbot**) at the top right of the page.
3. Fill in the following fields:
    a. **Name** – the chatbot's text identifier.
4. If necessary, fill in the following:
    a. **Description** – additional information about the bot.
    b. **Webhook URL** – a way to notify the customer about an event that has occurred in the system via custom callbacks over the HTTP or HTTPS protocols. The developers or managers of the team providing an external chatbot need this.
5. Press **Add**.

   An external chatbot will be created.

12.2. Viewing an external chatbot

To view an external chatbot:

1. Go to the **External chatbots** page.
2. Use the search at the top of the page.
3. Press next to the chatbot you want.
4. Review the provided information.

Name	The name of the external chatbot.
Description	A text description, some additional information.
Token	An external token is required to authorize a user with a service managed by a consultant bot. It is generated automatically when an external bot is created in the system.
Projects	The list of projects that the external chatbot is linked to, selected languages, and customers' countries of registration.
Webhook: URL	A webhook is used when interacting with third-party content bots. A webhook is a way to notify the customer about an event that has occurred in the system via custom callbacks over the HTTP or HTTPS protocols. The developers/managers of the team providing an external chatbot need this.
Last call date	The date of a customer's last call to the external chatbot in the widget/application.
Last response	The date of the last response from the external chatbot to a customer in the widget/application.

12.3. Editing an external chatbot

To edit an external chatbot:

1. Go to the **External chatbots** page.
2. Use the search at the top of the page.
3. Press next to the chatbot you want.
4. To change the basic data of an external chatbot:

   a. Press **Edit details**.
      The **Edit external chatbot** window will open.

   b. Change the required details.

   c. Press **Save**.

5. Add a project that is linked to the bot:

   a. In the **Projects** section, press **+ Add**. The **Add project** window will open.
   b. Select from the list or enter a project name.
   c. Select the languages that the bot will work with in the selected project.
   d. Select the countries of customer registration that the bot will work with.
6. Change the parameters of the linked project:
   a. Press next to the project you want to edit.
   b. Change the list of languages and countries of registration.
   c. Press **Save**.
7. To delete a linked project, press next to it.

12.4. Deleting an external chatbot

To delete an external chatbot:

1. Go to the **External chatbots** page.
2. Use the search at the top of the page.
3. Press next to the chatbot you want.
4. Confirm the deletion.
   The external chatbot will be deleted. An internal chatbot will be displayed to the customer in the widget or application if it has a content database instead. If there is no content database, the customer will be redirected to an operator.

13. Notifications

> **Important note:**
>
> Section under development

Two tabs are available on the page: **Inbox** and **Sent.**

If there are unread incoming notifications, the name of the **Notifications** section displays a **counter with the number of unread incoming messages**.

13.1. Incoming notifications

The types of incoming notifications are described below.

Table 13-1 Incoming notification types

All	All system notifications and all notifications sent manually by administrators and managers.
Important	Notifications sent by administrators and managers via the notification editor.
Inspection	System notifications about changes in the inspection status in chats that the employee participated in: • Notifications when the assessor assigns a rating to an operator. • Notifications about a changed rating. • Notifications about a rejected rating.

13.1.1. Managing incoming notifications

To manage notifications:

1. Go to the **Notifications** page.
2. Select notifications using the checkbox on the left side or press **Select all** at the top of the page.
3. To mark notifications as read, click **Mark as read** at the top of the page.
4. To delete notifications, press **Delete** at the top of the page.

13.1.2. Principles that guide who receives notifications

The principles used to determine which user roles receive notifications are presented below.

	RATER					
NOTIFICATION RECIPIENT	ADMINISTRATOR	MANAGER	MODERATOR WHO IS BEING REVIEWED	RESTRICTED MODERATOR WHO IS BEING REVIEWED	MODERATOR WHO IS NOT BEING REVIEWED	RESTRICTED MODERATOR WHO IS NOT BEING REVIEWED
Administrator	No	No	No	No	No	No
Manager who is NOT in the same group as the rater	No	No	No	No	No	No
Manager who is in the same group as the rater	No	No	Yes	Yes	No	No
Moderator who is being reviewed	No	No	No	No	No	No
Restricted moderator who is being reviewed	No	No	No	No	No	No
Moderator who is NOT being reviewed	No	No	No	No	No	No
Restricted moderator who is NOT being reviewed	No	No	No	No	No	No
Senior operator (whose operator participated) NOT in the same group as the rater	No	No	No	No	No	No

NOTIFICATION RECIPIENT	RATER					
	ADMINISTRATOR	MANAGER	MODERATOR WHO IS BEING REVIEWED	RESTRICTED MODERATOR WHO IS BEING REVIEWED	MODERATOR WHO IS NOT BEING REVIEWED	RESTRICTED MODERATOR WHO IS NOT BEING REVIEWED
Senior operator (whose operator participated) in the same group as the rater	Yes	Yes	No	No	Yes	Yes
Operator with a senior operator	Yes	Yes	No	No	Yes	Yes
Operator without a senior operator	Yes	Yes	No	No	Yes	Yes

NOTIFICATION RECIPIENT	PERSON WHO CHANGED THE RATING					
	ADMINISTRATOR	MANAGER	MODERATOR WHO IS BEING REVIEWED	RESTRICTED MODERATOR WHO IS BEING REVIEWED	MODERATOR WHO IS NOT BEING REVIEWED	RESTRICTED MODERATOR WHO IS NOT BEING REVIEWED
Administrator	No	No	No	No	No	No
Manager who is NOT in the same group as the person who is changing the rating	No	No	No	No	No	No

NOTIFICATION RECIPIENT	PERSON WHO CHANGED THE RATING ADMINISTRATOR	MANAGER	MODERATOR WHO IS BEING REVIEWED	RESTRICTED MODERATOR WHO IS BEING REVIEWED	MODERATOR WHO IS NOT BEING REVIEWED	RESTRICTED MODERATOR WHO IS NOT BEING REVIEWED
Manager who is in the same group as the person who is changing the rating	No	Yes	yes	Yes	No	No
Moderator who is being reviewed	Yes	Yes	No	No	No	No
Restricted moderator who is being reviewed	Yes	Yes	No	No	No	No
Moderator who is NOT being reviewed	Yes	Yes	No	No	No	No
Restricted moderator who is NOT being reviewed	Yes	Yes	No	No	No	No
Senior operator (whose operator participated) NOT in the same group as the person who is changing the rating	No	No	No	No	No	No
Senior operator (whose operator participated) in the same group as the person who is changing the rating	Yes	Yes	No	No	Yes	Yes
Operator with a senior operator	Yes	Yes	No	No	Yes	Yes
Operator without a senior operator	Yes	Yes	No	No	Yes	Yes

PERSON WHO REJECTS THE RATING		
NOTIFICATION RECIPIENT	**ADMINISTRATOR**	**MANAGER**
Administrator	No	No
Manager who is NOT in the same group as the person who rejects the rating	No	No
Manager who is in the same group as the person who rejects the rating	n/a	Yes
Moderator who is being reviewed	Yes	Yes
Restricted moderator who is being reviewed	Yes	Yes
Moderator who is NOT being reviewed	Yes	Yes
Restricted moderator who is NOT being reviewed	Yes	Yes
Senior operator (whose operator participated) NOT in the same group as the person who rejects the rating	No	No
Senior operator (whose operator participated) in the same group as the person who rejects the rating	No	No
Operator with a senior operator	No	No
Operator without a senior operator	No	No

13.2. Sent notifications

Only employees with the Manager or Administrator role have the ability to send notifications.

You can view sent notifications on the **Sent** tab. Under the title and text of the notification, the date and time of sending, the sender, and the number of recipients are shown. Clicking on the number of recipients opens a window that lists all recipients, except for employees with a higher-level role, who will appear as Unknown.

13.2.1. Sending notifications

To send a notification:

1. Go to the **Notifications** page.
2. Press (**Send notification**). A window for sending a notification will open.
3. Configure the following settings:

   a. Project.
   b. Notification title.
   c. The text of the notification.
4. If necessary, select individual employees.

> **Important note:**
>
> You can choose employees from projects other than those selected.

5. Press **Continue**.

   A window for previewing the notification will open.
6. If the appearance of the notification is correct, press **Send**.

   The notification will be sent to all the specified employees, or, if no employees have been selected, then to all employees on the selected projects.