Betty: INSIGHTS Navigation Guide

Purpose of This Guide

This document is designed to help users navigate the Betty INSIGHTS portal. It includes step-by-step instructions for logging in, accessing analytics, managing profile and content settings, and using INSIGHTS reporting tools. Use this guide to understand how to access usage metrics, edit assistant personality, explore content sources, and troubleshoot common questions through the portal. This guide will answer questions such as:

- "How do I view my dashboard analytics?"
- "Where can I export conversation history?"
- "How do I update my assistant's personality?"
- "What reports are available through INSIGHTS?"

Login Instructions for INSIGHTS

Below are the steps a user should take to login to their INSIGHTS portal account. If they run into any issues, they should reach out to support@meetbetty.ai for further assistance.

1. Navigate to the Betty INSIGHTS portal here: https://betty-admin-ui.azurewebsites.net/
2. Enter your email address and password. If it is your first time logging in, use the credentials provided in your welcome email.
3. If you've forgotten your password, use the "Forgot password?" link – this will send a password reset link to your email.
4. Click "Continue" to proceed

Understanding the Dashboard

Once logged in, you will be brought to your organization's dashboard within INSIGHTS. The dashboard provides usage analytics over a selected time period (you can view data for different date ranges). This section walks you through the steps for navigating the graphs and data provided on the dashboard.

Key Metrics on the Dashboard:

- ☐ Daily Unique Users
- ☐ Total Unique Users
- ☐ Daily Questions
- ☐ Total Questions
- ☐ Popular Content

Steps to Navigating the Dashboard:

1. **Select Organization** - Your Organization should be visible in the organization field in the top left corner of the page.
2. **Select Instance** - If you have more than one instance of Betty, you can select the instance you are interested in viewing by clicking into the "Select Instance" field.
3. **Customize the Date Ranges -** Click the date range dropdown (default: "Last 30 days"). Select from predefined date ranges. The first four graphs will automatically update to reflect your selection. The only static graph is the Popular Content graph, which shows you the most referenced content over the lifespan of your Betty instance.
4. **Download Dashboard Data -** Use the "Export Data" button below each graph to download a csv file with the data used to populate the graph above.
5. **Download Dashboard Graphs** – Click on the camera icon in the top right corner of each graph to download a .png version of the graph.

Understanding the Profile Section

The organization profile is the “brain center” of your Betty within INSIGHTS. The screenshot below shows a visual of the profile area on the left hand navigation menu. The Profile provides many of the components that make your Betty her.

Key Areas of the Profile

1. **Instance Name**: Identifies the specific Betty instance.
2. **API Endpoint Key**: A unique deployment key for your Betty instance.
3. **Description**: A summary of your instance’s use case.
4. **Content Sources**: A list of available knowledge sources for your organization, which you can toggle on or off per instance.

5. **Features**: Optional settings for each instance, such as message limits.
6. **Personality**: Betty's foundational behavior and tone settings.

Step to Navigating the Profile

1. Access the Profile
    a. Click **"Profile"** from the left-hand menu.
2. Edit the Personality
    a. Click the **"Personality"** button in the top-right corner.
    b. Review the assistant's existing personality.
    c. Make any updates directly in the text editor.
    d. Click **"Save"**.

    Note: Changes apply globally unless marked as "Instance Specific". Consult the Betty team before making updates.
3. Manage Content Sources
    a. On the main page of the Profile, view the list of **Content Sources** for your organization.
    b. For each instance, you can subscribe or unsubscribe to a content source by toggling each source ON or OFF to control which sources Betty can reference.
    c. Click **"Save"** to apply changes.

    Tip: Content access is instance-specific. Always confirm the correct instance is selected before modifying content availability.
4. Configure Features (Optional)
    a. Under the **"Features"** section, adjust any optional toggles relevant to your instance, such as conversation limits or other features discussed with the Betty team.

Exploring the Content Reports

The **Content** reports section offers insight into how your organization's content is being referenced and used by Betty. The content report helps you understand which content sources and items are included in Betty's training, how they are titled and referenced (by URL), and how frequently they are referenced by Betty.

When you enter the **Content** section under **Reports**, you'll see a searchable, filterable list of all content that is accessible to your Betty instance. Each

content item is listed by Title in a table, along with the publication date (Date), Status, and Reference count.

What You Can Do in the Content Report:

1. View all content available to your instance
2. Filter content by publication date, source, title, or status
3. Identify the most frequently referenced content
4. Export data for reporting or auditing purposes

Steps to Navigate the Content Reports:

1. **Access the Content Reports Page**
    a. From the left navigation menu, click **Reports > Content**.
2. **Search and Filter Content**
    a. Use the search bar to locate a specific content item by title or content ID.
    b. Use filters to narrow content by:
        i. **Publication Date** (“Date”)
        Note: If the content was pulled in manually and no publication date was provided, this date will be the date is was added to the content library.
        ii. **Status** (Active, Processed, Deleted)
        iii. **Content Source**
        iv. **Title**
3. **Export Content Data**
    a. Click the **Export** button above the content table.
    b. Select fields such as Source, Priority, Date, Reference Count.
    c. Export to CSV for analysis or sharing.

This section is especially helpful for content strategists or administrators looking to understand how Betty uses knowledge sources and to ensure that high-priority content is being accessed as intended.

Exploring the Conversation Reports

The **Conversations** report gives you access to individual interactions between users and Betty. This area is key for understanding user behavior,

evaluating response quality, and identifying training opportunities or knowledge gaps.

You can view summaries of each conversation, drill into full transcripts, and export the data. Filters allow you to focus on specific time periods, user IDs, or types of feedback to surface relevant conversations.

What You Can Do in the Conversations Report:

- Search and review user interactions with Betty
- Filter by user ID, date, keyword, or feedback provided
- Export entire conversations or message-level summaries
- Analyze how Betty responds to different types of questions

Steps to Navigate the Conversations Reports:

1. **Access the Conversations Report**
    a. Click **Reports > Conversations** in the left-hand navigation.
2. **Apply Filters**
    a. Set parameters to refine your search:
        i. **Date Range**
        ii. **User ID**
        iii. **Feedback Type** (Positive or Negative)
        iv. **Search Terms** (specific words or phrases)
3. **View and Analyze Conversations**
    a. After searching, you'll see a list of conversations that meet your criteria. The list in the table shows a summary view of the conversations, displaying only the first question that was asked in each conversation.
    b. Each row in the summary table includes:
        i. Conversation ID
        ii. Date of conversation
        iii. User ID (if available)
        iv. First user question in exchange
        v. Number of messages exchanged in conversation
        vi. Number of negative feedback marks provided
        vii. Number of positive feedback marks provided
    c. Click on any conversation row to open a detailed view of the full exchange.

4. **Export Conversation Data**
    a. You can export three types of conversation reports:
        i. **Summary Conversation Export**: To export a summary of the conversations, click “Export Summary” above the summary table. Select the fields you would like to include in your export, or Select All.
        ii. **Detailed Conversation Export:** To export a detailed report of the conversations, click “Export Details” above the summary table. Select the fields you would like to include in your export, or Select All.
        iii. **Message-Level Export**: To export a message-level report of a single conversation, click into the conversation of interest by clicking on the conversation row in the summary table. In the top right corner, click Export. Select the fields you would like to include in your export, or Select All.

This section is especially helpful for support teams and AI trainers who want to understand how users are engaging with Betty and how Betty is performing across various use cases.

Exploring the Insights Reports

The **Insights** section is where advanced data analysis lives within the INSIGHTS portal. Here, you can explore trends across large sets of user interactions, track key performance indicators over time, and identify areas of opportunity based on real user data.

This section includes interactive charts and tools to zoom into specific data ranges or segments. It’s ideal for strategic reviews, performance audits, and long-term trend tracking.

What You Can Do in the Insights Report:

- ☐ View visualizations of Betty’s usage and engagement
- ☐ Identify peaks in activity or feedback trends
- ☐ Interactively explore patterns by segment, content, or behavior
- ☐ Reset and reapply filters to uncover different insights

Steps to Navigate the Insights Reports:

1. **Open the Insights Dashboard**
    a. Click **Reports > Insights** from the left navigation menu.
    b. Select the report you are interested in viewing.
2. **Interact with the Visualizations**
    a. For each report, start by selecting a date range at the top of the page to focus your view. You can select a pre-defined date range from the drop-down list, or a custom date range.
    b. Click Search.
    c. The graph for the selected date range will appear.
    d. Hover over data points in the graph for specific metrics.
    e. Click and drag across graph areas to zoom in for more detail.
    f. Double-click a chart to reset to the original view.
3. **Export Graphs or Data**
    a. Export a .png version of the graph by clicking on the small camera icon in the top right corner of the graph.
    b. Export the data that is populating the graph by clicking Export Data in the bottom right corner of the screen.

The **Insights** section is designed for users who want to go beyond individual interactions and look at big-picture trends and patterns that can inform both strategic decisions and day-to-day optimizations.

Access Help & Support

The **Resources** section of the INSIGHTS portal is your go-to destination for help, guidance, and support. Whether you're looking for documentation, want to offer feedback, or need to contact the Betty team directly, this section brings all those options into one convenient place.

Located in the left-hand navigation menu, **Resources** provides quick access to key support materials and tools designed to help you get the most out of your Betty experience.

What You Can Do in the Resources Section:

- Browse helpful documentation and training materials
- Submit product feedback or report issues

- Connect directly with the Betty support team

Navigating the Resources Section:

1. **View Help Documentation**
    a. Click **Resources** in the left navigation menu.
    b. From there, you'll be able to browse or download documentation covering various aspects of INSIGHTS functionality, from onboarding resources, to deployment instructions, or marketing toolkits.
2. **Submit Feedback or Report Issues**
    a. At the bottom-left corner of the left-hand navigation panel, you'll find a **Feedback Form**.
    b. Use this form to share product suggestions, flag bugs, or submit enhancement requests.
    c. All submissions go directly to the Betty product team for review.
3. **Contact Support**
    a. For any other questions, contact Betty support at support@meetbetty.ai.

Whether you're just getting started or need advanced troubleshooting, the **Resources** section is designed to help you resolve questions quickly and confidently — with support just a click away.