

Create a Feedback Prompt

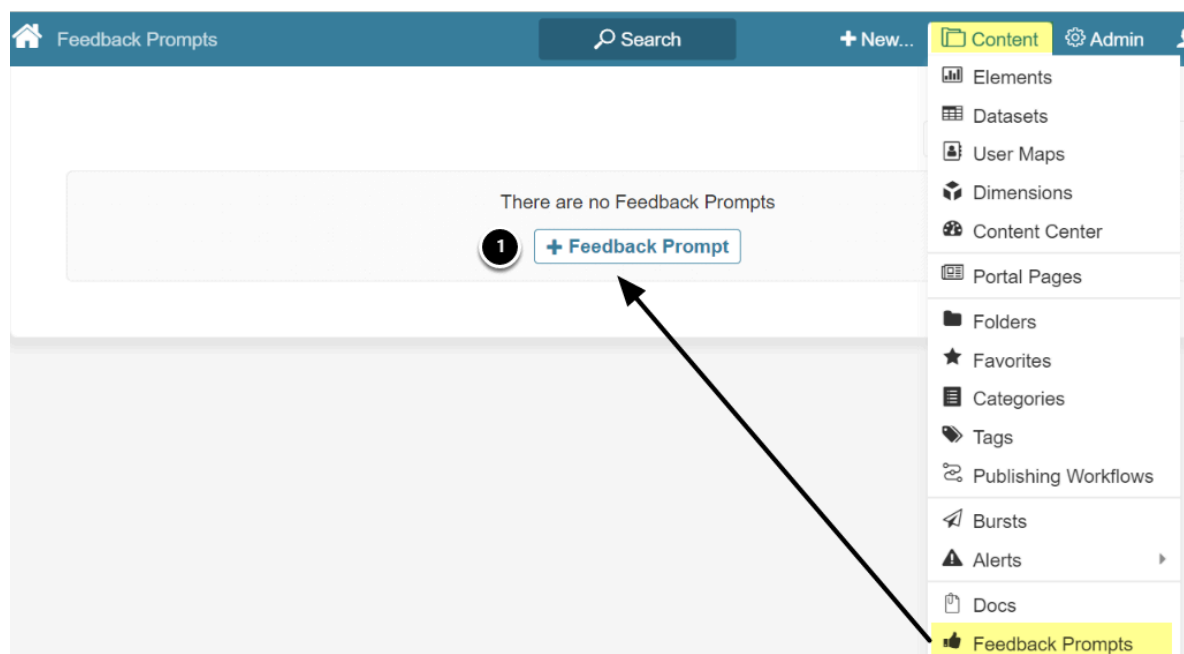
Metric Insights has provided the ability for users to assess Feedback for Portal Pages and Elements from Feedback Prompts. The Prompts are available to configure under Content > Feedback Prompts. You are free to formulate one or more questions, depending on what viewpoints you want to discover about the content. Once added, users can rate the content from 1 to 10 and/or leave specific comments. Feedback and other statistics are available on the Engagement tab of Element/Portal Editors.

💡 Global limits for how often a user should be prompted can be set via the following System Variables:

- **FEEDBACK_PROMPT_MAX_LIMIT**
- **FEEDBACK_PROMPT_MAX_LIMIT_INTERVAL**

1. Add Feedback Prompt

Content > Feedback Prompts



1. **[+ Feedback Prompt]** to view New Feedback popup

1.1. Set Prompt Range and Prompt Name

The image shows two screenshots of the 'New Feedback Prompt' dialog box in the Metric Insights interface. The top screenshot shows the 'Individual Elements' option selected under 'Prompt on'. The bottom screenshot shows the 'Selected Page' option selected, with a 'Page' dropdown menu and a link to 'How do I enable Feedback on a Portal Page?'.

Top Screenshot:

- Header: Feedback Prompts, Search, + New..., Content, Admin
- Dialog Title: New Feedback Prompt
- Step 1: Name (input field)
- Step 2: Prompt on ☒ Individual Elements ☐ Selected Page
- Button: Create

Bottom Screenshot:

- Header: Feedback Prompts, Search, + New..., Content
- Dialog Title: New Feedback Prompt
- Name (input field)
- Prompt on ☐ Individual Elements ☒ Selected Page
- Page (dropdown menu: Select page...)
- Link: [How do I enable Feedback on a Portal Page?](#)
- Button: Create

1. **Name:** Name of the Feedback Prompt
2. **Prompt on:**
 - If **Individual Elements:** Just click **[Create]**
 - If **Selected Page:** Select a **Portal Page** from drop-down, then **[Create]**

1.2. Setup the Prompt for Individual Elements (by Category) - Basics

Feedback Prompt / Prompt for Wine Sales Category

Search

1 1 + New...

Settings Element Feedback

☒ Enabled

Name

1 Element Prompt Text

2 ☐ Collect Ratings

3 For each Element: Prompt initially only after a user has accessed a specific element times.

4 If user doesn't respond, prompt again after every days.

Note: Any value that exceeds the global system value will be ignored.

5 Re-trigger the prompt for users again after days since the user's last response.

6 Note: Users will not be prompted more than 20 times in every 1 day interval. This limit is a global setting that applies to all feedback prompts. It can be set via System Variables.

7 Feedback Text Default

8 Apply To ☐ All Categories ☒ Selected Categories ☐ Selected Folders

Apply to Categories	
Name	
District Sales	<input type="checkbox"/>
Wine Sales	<input checked="" type="checkbox"/>

[+ Add Category](#)

9 Apply To ☒ All Users ☐ Users in Selected Groups

10 5 Elements will display this Prompt

1. **Element Prompt Text:** free-form entry
2. **Collect Ratings** opens two additional fields, these are explained in following Step - 1.2.1
3. **Prompt only after:** The number of times a User looks at an element before they will be prompted for input
4. **Prompt no more than:** Sets the limit for how many times a User can be prompted if they do not provide any feedback
5. **Ask User again:** Sets the time interval between prompts for a User when they provide feedback
6. The two variables set a limit to how often a User will encounter a Prompt from any source. Fields set in #3-5 apply at the element level.
 1. **FEEDBACK_PROMPT_MAX_LIMIT**
 2. **FEEDBACK_PROMPT_MAX_LIMIT_INTERVAL**
7. **Feedback Text Default:** free-form entry
8. **Apply to:** Selecting either *Selected Categories* or *Selected Folders* opens Popup to allow choice of multiple Categories/Folders
9. **Apply to:** You can Prompt *All Users* or *Users in selected Groups* will open Popup to allow choice of multiple Groups.
10. (unlabeled) Displays the number of elements that will contain this prompt. This is not available if *All Categories* is selected.

Then [Save & Enable] to activate the Prompt

1.2.1. Using the Collect Ratings Option

Feedback Prompt / Prompt for Wine Sales Category

Search

Settings

Element Feedback

Enabled

Name

Prompt for Wine Sales

Element Prompt Text

How likely is it that you would recommend this data to a colleague?

1

Collect Ratings

2

Negative is any rating below

2

and positive is any rating above

8

3

Label for "Low" Ratings:

Unlikely

"High" Ratings:

Likely

For each Element:

Prompt initially only after a user has accessed a specific element

1

times.

If user doesn't respond, prompt again after every

22

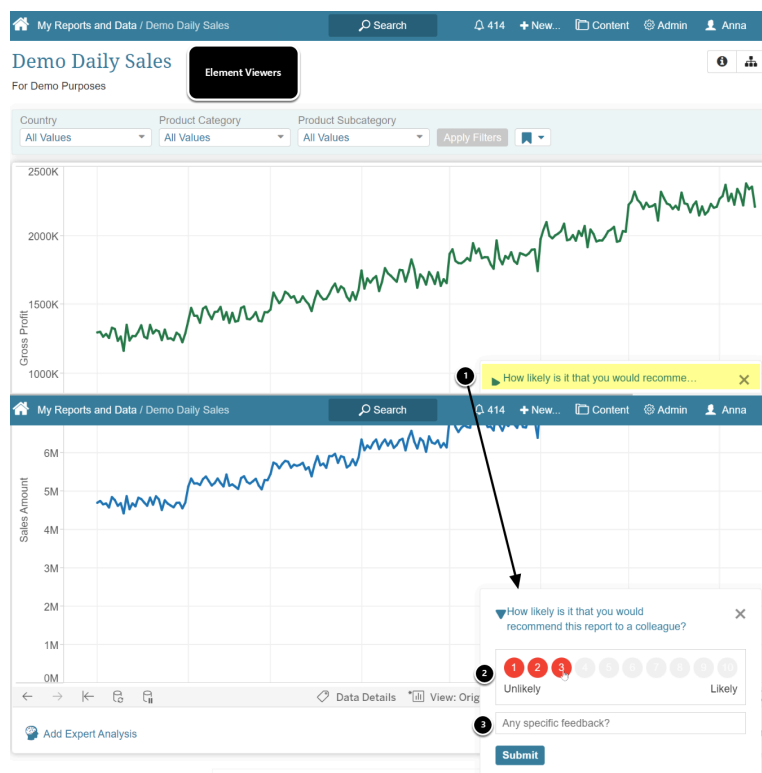
days.

Note:

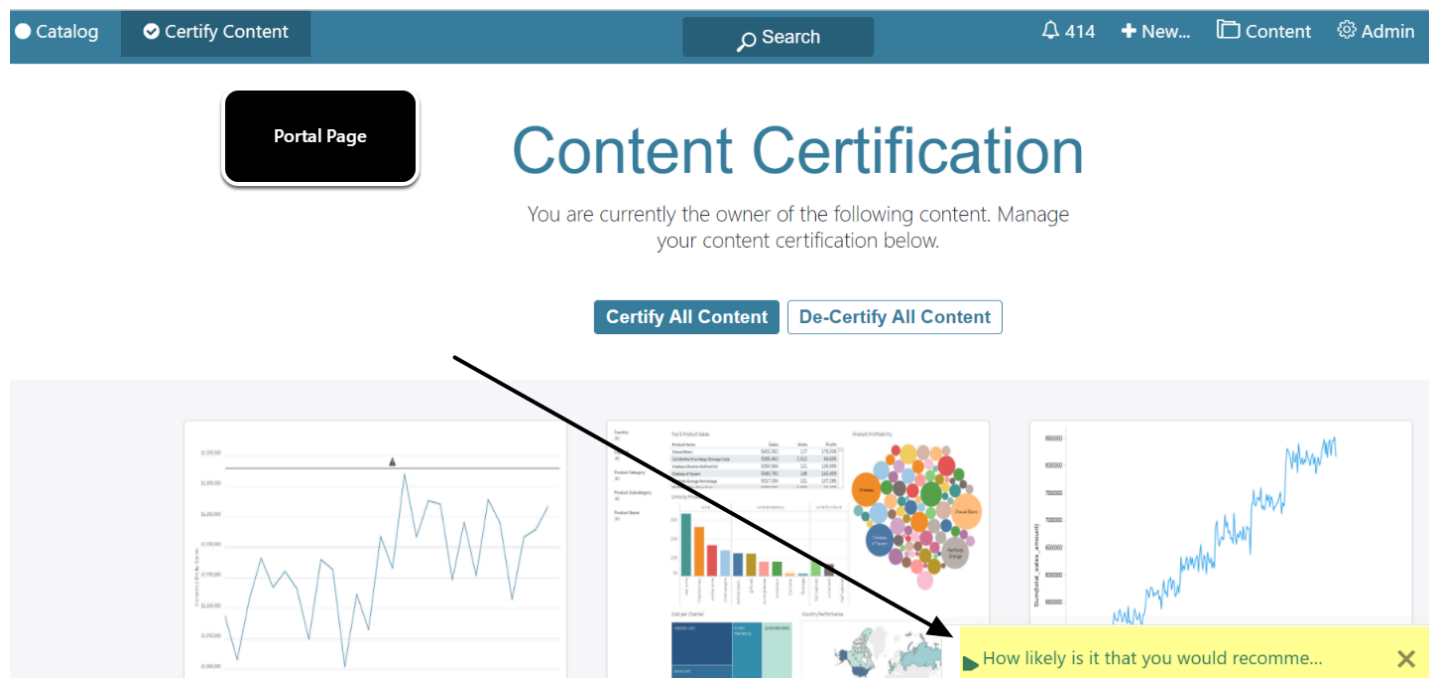
Any value that exceeds the global system value will be ignored.

- 1. Check **Collect Ratings** to open the following two input rows
- 2. Set **Negative** Rating and **Positive Rating** levels: input is numeric
- 3. Set **Labels** for **Low** and **High** Ratings: free-form input

2. Prompts Appear Will Appear on Lower Right Corner



1. Open the popup using the arrow
2. Input your response by clicking on a circle (these are color-coded: red/yellow/green).
3. Optionally, enter free-form specific feedback



Portal Page prompts work exactly like prompts for elements

2.1. [6.3.2] Feedback icon added to Share Options list

Located on right-side of elements/Portal pages

The screenshot shows the 'Wine Sales Report' page. At the top, there's a navigation bar with 'Wine Sales / Wine Sales Report', a search bar, and user controls. Below the navigation bar, the page title 'Wine Sales Report' is displayed. On the right side, there's a share options list with icons for download, print, and feedback. The feedback icon is highlighted with a yellow box and a callout bubble that says 'Give Feedback'. Below the share options, there's a table with columns: calendar_date, product_category, channel, country, Sum of total_cost, and Sum of total_sales_amount. The table contains data for various dates and countries. A yellow callout bubble with the text 'How informative is this Chart Display?' and an 'Edit' button is also visible.

1. **Feedback icon:** Click to add your rating and comments as shown above. This icon will always appear when a Feedback Prompt exists for this element.
2. **Feedback Prompt:** This Prompt may or may not display based on Prompt criteria set in [Setup the Prompt for Individual Elements \(by Category\)](#)

3. Setting Feedback Priorities

An element or Portal Page can have multiple Prompts asking different questions. Since only one Prompt can be triggered at a time, you use the "Drag and Drop" function in the grid below to set priority for Prompts. The uppermost Prompt will have priority if there are multiples.

The screenshot shows the 'Feedback Prompts' management page. It features a table with columns: Name, Prompt On, Categories, Groups, and Total Rating Submissions. The table lists several prompts, including 'Prompt for Wine Sales Category', 'Chart Prompt - Wine Category', 'Elements for Certification', 'daily sales by country', 'My Reports and Data Category', and 'Help Portal'. The 'Prompt for Wine Sales Category' and 'Chart Prompt - Wine Category' are highlighted with callouts 1 and 2 respectively. A 'Drag & Drop Rows to Prioritize' instruction is shown above the table. At the bottom, there's a '+ Feedback Prompt' button.

Name	Prompt On	Categories	Groups	Total Rating Submissions
1 Prompt for Wine Sales Category	Individual Elements	2		1
2 Chart Prompt - Wine Category	Individual Elements	1		0
Elements for Certification	Certify Content			1
daily sales by country	Individual Elements	2		1
My Reports and Data Category	Individual Elements	1		5
Help Portal	Advanced Portal Page		2	0

1. Since these two Prompts have Wine Sales Category in common, Users will first be prompted for Report elements in that Category, and then, assuming that the Prompt interval hasn't

expired on the first Prompt, next time the User will be prompted for the Chart displayed in that Report.

Example of Ordering of Two Prompts in Section 3

Feedback Prompt / Prompt for Wine Sales Category

Search

1 New...

SettingsElement Feedback

Enabled

First Prompt

NamePrompt for Wine Sales Category

Element Prompt TextHow likely is it that you would recommend this data to a colleague?

Collect Ratings

Negative is any rating below2and positive is any rating above8

Label for "Low" Ratings:Unlikely"High" Ratings:Likely

For each Element: Prompt initially only after a user has accessed a specific element1times.

If user doesn't respond, prompt again after every3days.

Note: Any value that exceeds the global system value will be ignored.

Re-trigger the prompt for users again after180days since the user's last response.

Note: Users will not be prompted more than 20 times in every 1 day interval. This limit is a global setting that applies to all feedback prompts. It can be set via System Variables.

Feedback Text DefaultAny specific feedback on this Category?

Apply To

All Categories

Selected Categories

Selected Folders

Apply to Categories	
Name	
District Sales	
Wine Sales	

+ Add Category

5 Elements will display this Prompt

Apply To

All Users

Users in Selected Groups

Feedback Prompt / Chart Prompt - Wine Category

Search

1 New...

SettingsElement Feedback

Enabled

Second Prompt

NameChart Prompt - Wine Category

Element Prompt TextHow informative is this Chart Display?

Collect Ratings

Negative is any rating below4and positive is any rating above8

Label for "Low" Ratings:not helpful"High" Ratings:very helpful

For each Element: Prompt initially only after a user has accessed a specific element1times.

If user doesn't respond, prompt again after every3days.

Note: Any value that exceeds the global system value will be ignored.

Re-trigger the prompt for users again after180days since the user's last response.

Note: Users will not be prompted more than 20 times in every 1 day interval. This limit is a global setting that applies to all feedback prompts. It can be set via System Variables.

Feedback Text DefaultAny specific feedback?

Apply To

All Categories

Selected Categories

Selected Folders

Apply to Categories	
Name	
Wine Sales	

+ Add Category

4 Elements will display this Prompt

Apply To

All Users

Users in Selected Groups

Create a Feedback Prompt

Page 7

4. Understanding Feedback Results

4.1. On Feedback Prompt Editor

Access **Element Feedback** tab

Feedback Prompt / Prompt for Wine Sales Category

Search

2 + New... Content Admin Anna

Settings

Element Feedback

+ Q [] [] Saved

1

Element

User

Group

Rating

All

Everyone

All Groups

All

Q

Element Feedback

[]

Element	Score	Submissions	Comments	Total Prompts
Wine data daily (Version 2)	0	1	1	1
Wine Sales Report	+100	1	0	2

- 1. Filters allow parsing of the Feedback data by various factor

4.2. On Specific Elements

Click on any Element name in above grid to access Element Editor

Reports / Wine Sales Report

Search

+ New... Content Admin

Info

Data

Content

Distribution

Associations

Documents

Advanced

Engagement

History

[] [] [] [] View []

2

Feedback

1

Feedback Prompt

daily sales by cou...

Question asked: How likely is it that you would recommend this report to a colleague?

This Element: +100

All content in portal average: +45

How is this computed?

2

Negative

Neutral

Positive

Feedback History

User	Rating	Last Rated	Comment
Anna Kennedy	8	2022-02-07 20...	still too much detail to be useful
Anna Kennedy	8	2021-11-08 18...	too much information

Purge

Purge History

Re-Trigger Prompt

If the Element has changed significantly, you may re-ask users for feedback. Be thoughtful about this so as not to spam them with feedback requests.

- 1. Access the **Engagement** tab

2. Scroll down to **Feedback** Section

For details of the analysis, see [Understanding Engagement and Feedback on Elements](#)