

Prompt Templates – Guide for System Admins

Last updated on July 8, 2024

Introduction

InfoDesk Admins can create and manage Prompt Templates for the AI Copilot and make them available for the portal users.

The Prompt Templates are available for InfoDesk Admins on the Prompt Template page in Admin.

You can create and manage prompt templates for all functions where the AI Copilot can be used across the platform, allowing users to easily access tailored prompts for each feature and use case:

- Single Post Summary
- Multiple Post Summary
- Newsletter Summary
- Report Summary
- File Summary
- RAG Question and Answer

Global and Portal Prompt templates

There are two kinds of prompt templates, Global templates and Portal templates. Global templates are available in all portals, while portal templates are only accessible within their respective portals.

Where to find the feature

On the Prompt template page in Admin.

User Access

The Prompt template page in Admin is only available for InfoDesk Support and InfoDesk Admins.

Customer Admins (Superuser Admins) do not have access to the Prompt Template page in Admin.

User Access to Global prompt templates

Only InfoDesk **Support** is allowed to create and manage **Global** prompt templates. Global templates are available in all portals when activated.

User Access to Portal prompt templates

Account Managers and Customer Success are allowed to create and manage Portal prompt templates for their customers. However, we recommend that only **InfoDesk Admins** with advanced skills in prompt engineering create the prompt templates.

Prerequisites:

The feature requires advanced skills in prompt engineering and is not recommended for common use.

For more information, contact InfoDesk Support.

How to activate the feature

The Prompt Templates page in Admin is available in all portals by default.

The prompt templates are activated when created.

Note that the Select prompt template drop-down in the AI Copilot instructions sidebar will only be visible on the side drawer if more than one of the same Prompt Template types has been created for the portal.

How to create a new Prompt template

Follow these steps to create a new Prompt Template:

1. Navigate to the **Prompt templates** page in **Admin**.
2. Click the **New prompt template** button.
3. **Template type:** On the New prompt template form: Select the **Template type** (e.g. Multiple Post Summary) the AI Copilot prompt will be used for:
 - Single Post Summary
 - Multiple Post Summary
 - Newsletter Summary

- Report Summary
- File Summary
- RAG Question and Answer (to be used by the InfoDesk AI Team only)

GOOD TO KNOW!

All portals come with a pre-built global default prompt template for all types of templates. These global templates cover the most common prompt use cases and needs. It is recommended to avoid adding custom portal templates unless it is absolutely necessary.

It is important to note that the default Portal template always takes precedence over the Global default template of the same type. This means that if a bad Portal template is added, it will replace a professionally built global template.

All portal prompt templates can be deleted. When a Portal prompt template is deleted, the Global prompt template will take over and continue to function as expected.

4. **Template scope:** Select if the template should be used for all portals or only for this portal.
 - a) Select **Portal** (preselected) to only make the template available in this portal.
 - b) Select **Global** to make the template available in **all** portals.
Note that global prompt templates will affect all portals and is only managed by InfoDesk Support.
5. **Name** the template with a title that reflects the purpose of the prompt template (for example "Trend description" or "Language: Spanish"). This is the name that will be visible for user in the Prompt template dropdown. A short name is strongly recommended.

6. **Instructions:** This text box is where you create the prompt.
Note that good instructions require prompt engineering expertise.
Type the instructions in the instructions field (for example "Summarize as a Trend in a maximum of three sentences" or "Summarize in Spanish in a maximum of five sentences").

Tips and Recommendations:

Length restrictions: Always add a length restriction, for example maximum number of words or sentences. Note that limitations set on the instructions will interact with the set number of tokens which also restrict the length of the text. Read more about Tokens below.

Language prompts: When you want to prompt the use of specific languages, write the prompt in that language to provide the best result.

Magic strings: Most Global template types contain "magic strings," such as `##userPrompt##`. When a user enters new instructions, the magic string (`##userPrompt##`) will be replaced within the prompt. If the template does not have a magic string, the user's instructions will replace the entire original prompt.

Magic string examples:

`##userPrompt##` (for user custom instructions)

`##reportTemplateName##` (only used in report template types)

Surround the headline with `#!#` (escape sequence to extract titles in combined summaries).

7. **User prompt required:** Check the **User prompt required** checkbox to require that the prompt template will be used in combination with custom instructions that are manually added in the instructions bar. When checked the AI CoPilot will only work when the user adds custom instructions.

8. **Interdependence:** Check the interdependence checkbox to only allow this template to be used together with a prompt that handles multiple posts. Note that the interdependence choice is only visible when a Single Post Summary template type is selected.

This feature regulates which templates users can see in the dropdown selection. When the interdependence checkbox is checked, interdependent templates are shown in the dropdown.

9. Select if the **Grounding content placement** should be above or below the template prompt instructions.

Grounding content is the context we retrieve from the portal for the different prompt template types. For example, a single post grounding content will be the post title, abstract and content. A report template grounding content will be all report posts sorted by report field.

10. **Model:** Select your preferred AI model in the Model drop down menu. All models have different token sizes and prices. Our recommendation is to use GPT3.5 Turbo, when possible, to optimize price and speed.

Recommendations:

Use **GPT3.5 Turbo** for single post summary prompt templates.

Use **GPT4** or **GPT4 128K** for advanced scenarios like combined summary prompt templates and report prompt templates.

11. **Token:** Set a number of max return tokens. 250 tokens are the default. Increase the number if you want to generate more text in the response. Decrease the number of tokens if you want to generate less text in the response. The maximum length of the AI generated text response is determined by the number of tokens you enter.

GOOD TO KNOW!

Return tokens depend on the model selected (for example GPT3.5 Turbo). You need to check the token capacity for each used model. The maximum return tokens can never be more than half of the token capacity.

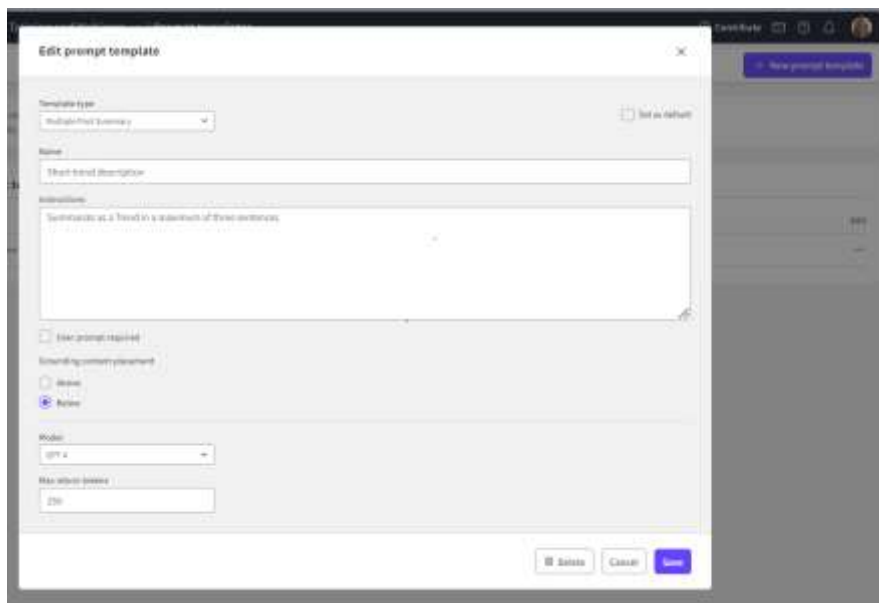
Example: GPT3.5 Turbo has a capacity of 4096 tokens. Most of the capacity is used by the prompt, grounding content and the return. Hence a maximum return token on GPT3.5 Turbo is 500 return tokens.

Recommendation: Try to firstly limit the actual length of the returned text by adding maximum number of words or sentences in the prompt template Instructions. Read more in the Instructions paragraph above.

12. Optional: Click **Set as default** to use this prompt template as the default template for the selected template type (e.g. multiple post summaries).

Please note that you can only have one default template type per prompt template type.

13. Click **Save** to save the template.



The screenshot shows a 'Edit prompt template' dialog box. It has a 'Template type' dropdown set to 'Multiple post summary' with a 'Set as default' button next to it. Below is a 'Name' field containing 'Short text description'. The 'Instructions' field contains 'Summarize as a list in a maximum of three sentences'. There are checkboxes for 'User prompt required' (unchecked), 'Grounding content placement' (unchecked), 'None' (selected), and 'Before' (unchecked). At the bottom, there is a 'Model' dropdown set to 'GPT 4' and a 'Max return tokens' input field set to '250'. The dialog has 'Cancel' and 'Save' buttons at the bottom right.

Prompt template example

Below is a simple example of a prompt template form:

Select the **template type** the prompt will be used for: Multiple Post Summary


Name the template with a title that reflects the purpose of the prompt template:
Trend description.


Type **instructions** in the instructions field: Summarize as a Trend in a maximum of three sentences.

Select language **model**: **GPT4** or **GPT4 128K**



Select max **return tokens**: 250 (default)

The prompt template is now available in the Summarize feature when summarizing multiple posts.



 **AI Copilot** ×




 Short trend description ▼

Custom instructions for AI Copilot

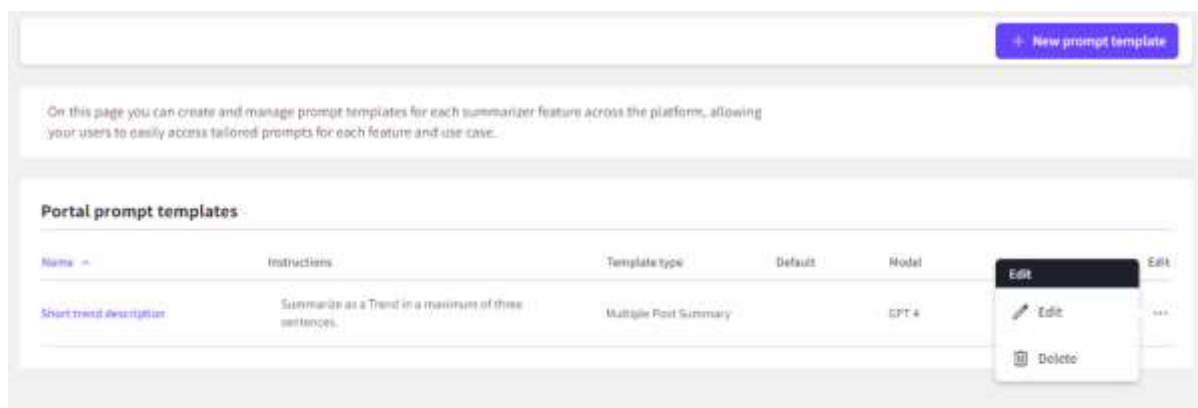
▶ Generate

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How to edit a Prompt template

1. Navigate to the **Prompt templates** page in Admin.
2. Click the prompt template name or the More button under Edit and select **Edit**.
3. Edit the prompt template form and **Save**.



How to delete a Prompt template

1. Navigate to the **Prompt templates** page in Admin.
2. Click the prompt template name or the More button under Edit and select **Delete**.

