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What is Userlane?

Last Modified on 11.06.2026

Userlane is the platform for enterprise software performance. It combines Application Intelligence, which makes visible where technology creates cost and friction, with Contextual Assistance, which helps people get work done inside their applications. Together, they form a closed loop: intelligence identifies what needs attention, assistance acts on it, and the results feed back into intelligence, so the next step is always informed by what actually happened.

Our platform

Application Intelligence

See how software is actually used. Find what's underperforming. Know where to focus.

- Gain full visibility of your organization's technology stack with Userlane's App Discovery. Track and reveal which applications employees use across the organization quickly and easily by securely deploying our Browser Extension without any interaction with end users or integrations. Reduce shadow IT, uncover duplicate software, and pinpoint areas for improved software adoption.
- Understand value drivers by monitoring usage, identifying points of friction, and understanding interaction patterns with Userlane's HEART analytics. It allows you to measure the success of digital transformation initiatives across your organization by tracking user behavior across software applications. Our Platform Reporting tracks the performance and engagement of your support content, so you can iterate faster and drive further software adoption.

Contextual Assistance

Help people get work done inside your applications with guidance, automation, and in-app communication.

- Engage users, drive software usage, and increase proficiency with Userlane's in-app Engagement Suite. Instantly announce updates, start surveys, and promote specific topics.
- Create interactive step-by-step guides, tooltips, and tags in your live app within minutes with Userlane's content creation engine. No coding required.

How the two pillars work together

Application Intelligence flags underuse, friction, or low adoption through HEART scores and segment analysis. Contextual Assistance deploys the right response: a guide, an automation, an announcement, or the in-app assistant. Outcomes appear in Application Intelligence, which guides the next move. This loop runs continuously, so every intervention is measured.

Who uses Userlane

Userlane is used by organizations across healthcare, financial services, manufacturing, pharma, and other industries where software performance directly impacts operations. It is built for any organization that needs to:

- See how their software portfolio is actually being used and where it falls short

- Reduce friction in day-to-day work by supporting people inside the applications they use
- Prove outcomes from technology investments, rollouts, and change programs

Learn more

To get started, explore our Get Started help articles. To see how organisations use Userlane, visit userlane.com/success-stories. If you'd like to speak with us about how Userlane fits your needs, book a demo with one of our product experts.

Requirements and Guidelines for Developers

Last Modified on 29.09.2023

To ensure that Userlane will run smoothly on your application, follow these guidelines as much as possible.

They are recommendations from our Userlane IT Team. Should you have any questions regarding any of those points, do not hesitate to reach out to us.

Required

- The underlying app needs to run with an encrypted protocol (HTTPS) to ensure a secure and encrypted communication.
- The underlying app does not use a plugin such as Adobe Flash or Microsoft Silverlight.
- The underlying app does not register event callbacks in capture mode.
- The underlying app does not remove DOM nodes that it does not recognize, especially DOM nodes added by Userlane need to remain untouched.
- The underlying app does not modify native browser functions, for example with polyfills or XHR overrides.
- The underlying app does not use framesets, or does not expect Userlane to highlight elements in a frameset.
- The maximum z-index of the underlying app does not exceed 1,000,000.
- Ensure Userlane is allowed by your Content Security Policy. Find more details on it here.
- If a firewall is active, it has to be set to allow communication to Userlane servers.
- Every client needs access to the internet to communicate with Userlane's services.
- Third-party cookies must be enabled. Find more details on what cookies are stored.
- Based on the chosen implementation the supported browsers differ. Find more details on it here.

Optional

- Handover of relevant user data, e.g. permissions of the current user, to the Userlane JS Snippet API. This allows you to show Guides more targeted to the end-users. Read more about this here.
- Do not use hover actions or make hover actions also accessible via click. When a hover menu closes on mouseleave that can cause issues in highlighting the elements reliably for Userlane.

- Use relevant URLs that allow knowing what page the user is currently seeing. This helps you to show Guides specific to the page the user is currently looking at.
- If your application uses Cross-Origin iframes, please review this article here.
- Include semantic identifiers to relevant elements.
- We recommend using data-automation-id, data-test-id, data-userlane-id, data-userlane-role, or data-action-name attributes with semantic names (e.g. “createTutorialButton”, “deleteUserAction”). This helps you to make Userlane more stable regarding any updates in the HTML code of the application.

Support Response Times SLA

Last Modified on 04.06.2025

Depending on the selected support package, the response times differ:

1. Standard-level Support

For all support issues relating to Userlane Production Tenants, Userlane will make efforts to respond promptly to all tickets submitted through Userlane's designated support channel, in any event within two (2) Business Days after receipt.

2. Premier-level Support

Userlane will provide the following technical support response commitment for all Production Tenants: Response Commitment is the maximum time within which Userlane will respond (via Userlane's Support Channels) to each support issue reported by the customer during business hours.

Incident Levels and Response Times

Incident Level	Response Commitment
Severity Level 0 (Service Unavailability) Customer experiences complete loss of Service	Sixty (60) minutes
Severity Level 1 (Severe Issues) Customer experiences a severe defect or configuration issue with the Service that materially impacts Customer's business in a negative way relating to issues that don't qualify as Severity Level 0.	Two (2) hours
Severity Level 2 (Delayed Performance) Customer experiences transactional and operational slowness in the Service relating to issues that don't qualify as Severity Level 0 or 1.	Eight (8) hours
Severity Level 3 (Routine Requests) Routine Service support requests relating to issues that don't qualify as Severity Level 0, 1 or 2.	Two (2) days

3. Remedies for Breach of Response Time Commitments

If Userlane fails to meet the response time commitments above, the customer's exclusive remedy and

Userlane's sole obligation will be: (a) for Userlane to make efforts to respond promptly after the customer notifies Userlane that it failed to meet the relevant response time commitment; and (b) if Userlane fails to meet the relevant response time commitments three (3) times during a calendar quarter, for Customer to terminate the applicable Order Form and receive a refund, on a pro-rata basis, of any Fees paid for the Production Tenant(s) that are unused as of the termination effective date.

4. Customer Duties

Issues regarding customization or regarding the functionality of specific guides may require the customer to complete a network assessment, and/or give Userlane access to the Customer's network, in order to diagnose the issue.

Application Uptime

Last Modified on 29.12.2025

 Userlane's availability is guaranteed to exceed 99.5%. We regularly achieve higher uptime and the live status as well as historic data can be viewed on Userlane's Status page.

Uptime Commitment

The Quarterly Uptime Percentage for the Service will be ninety-nine and fifty percent (99.5%) (the “Uptime Commitment”). Subject to the exclusions below, “Quarterly Uptime Percentage” is calculated by subtracting from 100% the percentage of 1-minute periods during any quarterly billing cycle (i.e., 3 calendar months) in which the Customer’s Production Tenant(s) is(are) unavailable out of the total number of minutes in that quarterly billing cycle.

“Unavailable” and “Unavailability” mean that, in any 1-minute period, all connection requests received by the Customer’s Production Tenant(s) failed to process (each a “Failed Connection”); provided, however, that no Failed Connection will be counted as a part of more than one such 1-minute period (e.g. a Failed Connection will not be counted for the period 12:00:00-12:00:59 and the period 12:00:30-12:01:29).

The Quarterly Uptime Percentage will be measured based on the industry standard monitoring tools Userlane uses.

Exclusions from Quarterly Uptime Percentage

Notwithstanding anything to the contrary in this exhibit, any Service Unavailability issues resulting from any of the following will be excluded from the calculation of Quarterly Uptime Percentage:

1. regularly scheduled maintenance of the Service that does not exceed six (6) hours per 3-month period and is communicated by Userlane at least twenty-four (24) hours in advance via Userlane’s Normal Support Channels.
2. any failures of the Userlane Standard and Custom Reporting Services
3. any problems not caused by Userlane that result from (a) computing or networking hardware, (b) other equipment or software under the Customer’s control, (c) the Internet, or (d) other issues with electronic communications;
4. Userlane’s suspension or termination of the Service in accordance with the Agreement and/or its associated Order Form;
5. software that has been subject to unauthorized modification by Customer; 2.6. negligent or intentional misuse of the Service by Customer; or
6. “Beta” or “limited availability” products, features, and functions are identified as such by Userlane.

Scope of Customer Value Services

Last Modified on 02.10.2025

Empowering Strategic Success with Userlane

What Are Customer Value Services?

Userlane's Customer Value Services are designed to help you achieve more than just software adoption - we help you turn digital adoption into measurable outcomes. When you're on our Premier Support Plan, you'll be paired with a dedicated Customer Value Manager (CVM) - your strategic partner throughout the journey.

From day one to renewal and beyond, your CVM ensures your Userlane setup aligns with your business goals and evolves as your needs change.

Your Dedicated CVM: What to Expect

Your CVM is more than just a point of contact—they're a trusted advisor who collaborates with you across teams and milestones to help you get the most out of your Userlane experience. They support you by:

- Creating structured success plans together with you
- Guiding your onboarding journey
- Leading regular check-ins and strategic business reviews
- Helping align internal teams and escalate support issues effectively

What's Included in Customer Value Services

Here's a breakdown of the key services your CVM will provide under the Premier plan:

Service	What It Means for You
Onboarding Planning & Governance	A clear onboarding roadmap tailored to your technical landscape, timelines, and stakeholder responsibilities. We'll help you define what success looks like and how to get there.
Success Plan Development	A joint plan that links your business goals to concrete Userlane milestones - so we're not just implementing software, we're driving outcomes.
Business Reviews	Every quarter, your CVM leads a strategic review to reflect on usage data, milestones achieved, and what to improve. This is also a great time to explore new capabilities.

Adoption & Engagement Health Monitoring	We keep a pulse on how your users interact with Userlane - proactively flagging trends, challenges, or gaps in engagement before they become problems.
Technical Health Reviews	Regular deep-dives into your setup to ensure your configuration, content structure, and integrations are optimized for performance and scale.
Best Practice Consulting (DAP Advisory)	We share proven approaches to guide creation, audience segmentation, and process design. From storyboarding to targeting, your CVM helps you build smarter.
Product Roadmap Updates & Alignment	Stay ahead with insights into what's coming from Userlane and how new features can help support your initiatives.
Feature Enablement Sessions	When new features roll out, we don't just tell you - they show you. You'll get tailored walkthroughs focused on your use cases.
Support Coordination & Escalation	If you ever face roadblocks or critical issues, your CVM will work with our technical support team to ensure timely and effective resolution.
Expansion & Change Planning	Whether it's a new business unit, app rollout, or user group, we help you scale Userlane thoughtfully.

Two (2) hours of Customer Value manager services per month;

Two (2) hours of Technical Support services per month

Two (2) Executive Alignment meetings per year

How We Deliver

- Format: All services are delivered remotely via video meetings, emails, or shared planning tools.
- Languages: Available in English and German.
- Cadence: Typically, your CVM will meet with you monthly or quarterly, depending on your project phase and needs.

What's Not Included

While your CVM plays a crucial role in your success, some services fall outside their scope. These include:

- Content creation (e.g., building or maintaining guides)
- API/SSO configuration and integration
- Custom analytics or dashboards
- Project or program management
- On-site engagements (unless separately scoped)

If you need support in these areas, we offer it via Professional Services packages.

Onboarding Journey Overview

Last Modified on 06.05.2026

Userlane's onboarding methodology ensures fast time-to-value, a structured implementation experience, and sustained software adoption. This structured, multi-phase approach is guided by a dedicated Customer Value Manager and supported by onboarding specialists and technical consultants to ensure all stakeholders are aligned on objectives, implementation, and success outcomes.

The Setup and Onboarding package includes the following services.

Phase 1: Project Initiation and Technical Setup	
Kick-off workshop	Conduct a remote session to assess requirements, define success criteria, align on project goals, schedule, and scope.
Technical setup	Coordination with Customer IT to deploy the Userlane Browser Extension and/or Snippet, including SSO if applicable. Includes one (1) technical planning session and one (1) testing session.
Userlane training	Provision of access to Userlane's e-learning content and best practices material, supported by one (1) expert-led sessions where needed.
Phase 2: Success Plan, Content, Testing	
Success plan definition	Planning and consulting call focused on content strategy, analytics structure, and audience segmentation.
Go-Live planning & support	High-touch support for up to three (3) weeks, with up to two (2) 30-minute remote sessions per week. Designed to facilitate a smooth launch and user adoption.
Phase 3: Go-Live & Hypercare	
Go-Live & Hypercare	High-touch support for one (1) week, with up to two (2) 30-minute remote sessions. Designed to facilitate a smooth launch and user adoption.

Userlane and certified Userlane Partners offer additional services upon request. If you are interested, please ask your Userlane contact for more details.

Userlane Portal

Last Modified on 11.05.2026

The Userlane Portal is the browser component of the Userlane solution. It includes your account settings and everything else you need to manage, customize, and organize your content. The features available are dependent on your user role.

HEART

HEART tells you if users are using software to its full potential and in return maximizing the value that software was designed to bring. With the HEART framework, we are providing you with an effective way to learn more about digital adoption insights.

Content Analytics

Evaluate how different users interact with your support content, and get live engagement insights on your in-app notifications, Guides, and Tooltips and find content that needs optimization easily.

Messages

Messages are shown to your users through Assistant's pop-ups. There are 3 types of Messages you can send to your users.

Announcements are used to share news and information, you can monitor their performance in content analytics.

Standard Surveys allow you to ask your users any type of question.

An NPS Survey is a method of collecting application feedback with a dedicated way of calculating the score.

Segments

Here you can define user and page segments. User segments allow you to target content to specific user groups using a range of attribute options. Page segments allow you to define the web pages on which your Guides and Announcements are available to users.

Customize

On the Customize tab you can define general settings for your Userlane Assistant and content. Learn more about the customization options in the following articles:

1. Assistant: Define the behaviour of your Assistant
2. Guides: Define the behavior of your Guides
3. Search: Ensure what content your users can find
4. Help: Embed additional resources
5. Languages and Texts: Add and manage multiple languages
6. Default Texts: Customize button and slide texts

7. Design: Customize colors and design
8. Welcome Slide

Settings

It provides access to the following features:

Global Settings:

- **Applications:** add and change your application's name and URL
- Implementation Options
  - Snippet
  - SSO
  - Browser Extension
- **Integrations:** create and manage connections with a knowledge base or collaboration tool
- **Team:** invite users to your Team
- **User:** add and invite users to Userlane (Admins only)
- **Attributes:** create custom attributes
- File Transfers: view a history log of account processes, e.g. user and text import/exports

Personal Profile:

- Login: view and edit your Userlane credentials
- Notifications: receive email alerts when a Guide breaks
- API Token: generate a new access token to use for authentication

Access the Userlane Editor

The Open Application button brings you directly to your underlying application and the Userlane Editor.

Set up your Account

Last Modified on 29.12.2025

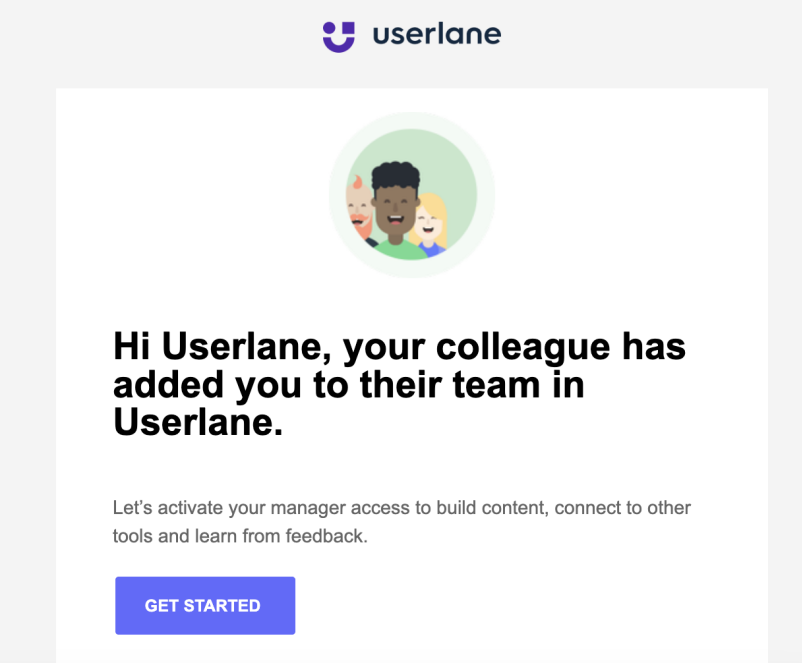
1. Get Account Access

If your company already has an account with Userlane, please reach out to your colleagues to get invited to the team.

Should your company not have an account with us yet, book a demo and get started.

2. Invitation Email

You will then receive an invitation email.



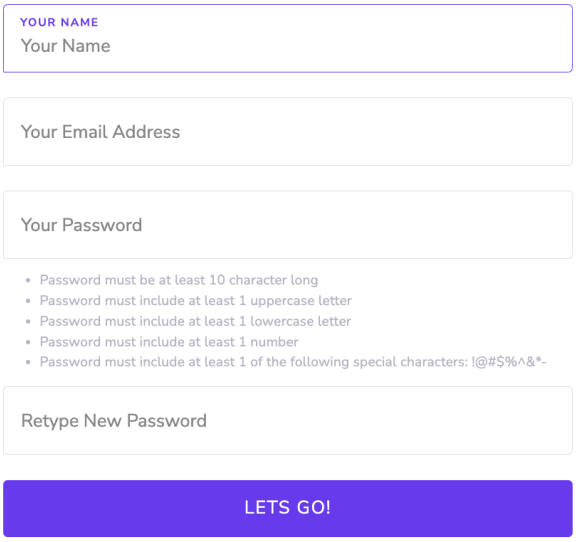
You have not received this email yet but know it was requested? Please check your spam folder and ensure mails from userlane.com are not blocked.

3. Get Started

Click on "Get Started", you will be redirected to Userlane and can fill in your details.

Please note that

- your name and email address will be visible to the whole team that is working on the Userlane account
- no information is visible to end-users



4. Password

Follow these requirements to set up your password:

- Password must be at least 10 character long
- Password must include at least 1 uppercase letter
- Password must include at least 1 lowercase letter
- Password must include at least 1 number
- Password must include at least 1 of the following special characters: !@#$%^&*-

5. Set up your Application URL

The Application URLs is a list of all URLs Userlane should be related to.

For more information, see here.

Set up your application URL

Last Modified on 21.04.2026

What it is

The Application URLs is a list of all allowed domains or URLs Userlane should be related to.

Why use it

You need to add Application URLs if you want to

- be connected to the Userlane Editor
- track HEART analytics for the URL
- have the Userlane Browser Extension activated for your Application

Number of Application URLs

The number of Application URLs you can set up is based on your contract. Should you reach your limit of allowed domains, please contact your Customer Value Manager.

Requirements

Please make sure the default URL is complete (i.e. the link can be found) and starts with https.

Optional: Wildcards

You can also add URLs containing wildcards. Userlane will then run on all web pages that match this pattern (e.g. *.google.com accepts test.google.com or instance.google.com).

How to set it up

The URL of your application should be set in the Userlane Portal.

First Setup

After Creation of the Account, you will be prompted to add an Application URL

- **when creating your Userlane Account**
- **if no Application URL was set before, when first time clicking Open Editor**

Adding or Changing Application URLs

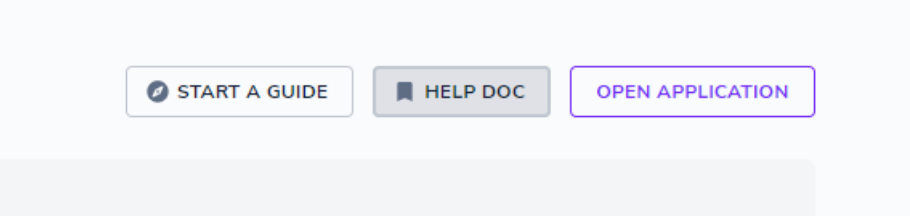
In the Portal, select **Settings** from the Application dropdown, then select **Application URLs** in the left sidebar.

Set up a Default URL

Within the Application URLs you can set one Default.

The **Default Application URL** will automatically be opened when you click the "Open Application" button in the Guide section or for redirecting your users when they start a Guide with a link.

A Default Application URL can not be a wildcard.



ℹ If you trigger a Guide via a link, users will be redirected to the default URL. If you would like to redirect your users to different URLs, check out our Share Guides directly with a link article.

Implementation Difference

Browser Extension	Snippet
Userlane will only show up for URLs that have been added as Application URLs. The Editor will not show for wildcard URLs. Assistant will show for manager after inviting oneself as end-user when using wildcard URLs.	Userlane will also show up if your URL has the snippet implemented but the Application URL has not been added. However, you will not be able to • see the Userlane Editor • track HEART analytics

Application URLs with HEART

The Userlane HEART Analytics, if activated, will work on the URLs added as Application URLs.

If you have many subdomains for your application, by adding a wildcard, you will instruct HEART to be active on any of them.

Example: Instead of adding *us.app.com*, *eu.app.com*, etc., you can just add a wildcard: **.app.com* and it will

activate HEART for any URLs ending in *app.com* .

For more details about managing HEART, like activating URL exceptions, please check this article.

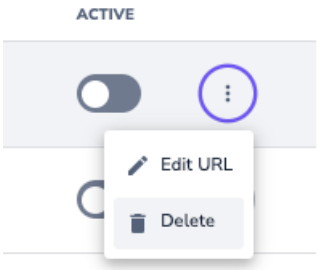
How to disable a URL

To disable an application URL, go to **Settings > Application URLs** and disable the toggle for the specific application.

> ℹ Disabling a URL applies only when Userlane has been implemented using the browser extension. If you have implemented Userlane via the JavaScript snippet, your Userlane content will still be accessible to your users.

How to delete an Application URL

If an Application URL is no longer needed, you can remove it by deleting it.



Troubleshooting

I have set up a URL but Userlane is not showing? Please go through our Checklist here.

Userlane Editor

Last Modified on 21.04.2026

What it is

The Userlane Editor is a powerful tool for creating interactive Guides, Tooltips, and Tags within applications, enhancing user experiences and facilitating content creation and editing.

How to open the Editor

1. Implement Userlane. Check out this article to learn about our implementation options.

2. For enabling Editor you need to add an underlying Application within the Portal. *Sign into Portal family.userlane.com > Click on the Application Dropdown button > Settings > Application URLs > + Add Application URL.*

3. Check out this article on how to access Editor

What to create with Editor

In Userlane Editor you can create the content that needs to be created directly on your Application and needs interaction with your Application's elements.

- How to record Guides
- How to record Tooltips
- How to record Validators
- How to record Tasks
- How to record Tags

More options when using Editor

There are some extra functionalities added to the Editor to make your Editing experience smoother. There is a **sidebar** that includes 6 options:



Userlane icon brings you back to the Portal

Guide icon to see all your existing Guides

Validator icon to see all your existing Validators

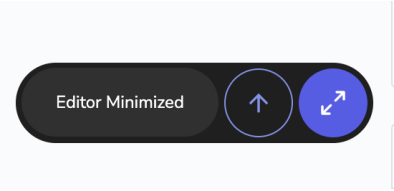
Tooltip icon to see all your existing Tooltips

Tasks icon to see all your existing Tasks

Tags icon to see all your existing Tags

On the top, you can see a **search bar** there quickly you can search for any Guide, Chapter, Tooltip, Validator, Task or Tag.

You can close the Editor by clicking the Close (×) icon or if you do not need to **exit the Editor** you can **minimize the Editor** by clicking the Minimize (⇄) icon next to the Close button. When the Editor is minimized you will see this on your application:



and you will be able to use your application without the need to record or edit anything.

As well, while the Editor is minimized you can click the arrow button to reposition the Editor panel to move it up and down in case you need to work on this area of the application. When you require to go back to the editing mode just click on the purple two arrows icon and that would open the Editor again and you can keep recording or editing.

> 💡 **Please note that within the Editor, segmentation applied to content will not be active. This ensures that all content can be viewed anywhere when in the Editor. Segmentation will only be applied at the end user view.**

Userlane Assistant

Last Modified on 23.02.2024

What it is

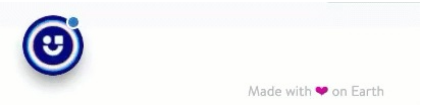
The Userlane Assistant is your users' main navigation tool for your content, providing access to all of your Guides and Messages.

When the Assistant is enabled for your users, an avatar is displayed in your application providing direct access to the Assistant menu:

- Guides
- Messages
- Search
- Help

> ℹ This navigation is not available if passive mode was activated for your account.

What it looks like



How to set it up

- Enable relevant menu options
- Customize the Assistant Look
- Assistant Position
- General Settings

Enable relevant menu options

Menu Option	Functionality
Guides	• organize your Guides into chapters • structure your chapters • use segmentation to define who sees what where
Messages	• communicate updates, share links, share Guides • share surveys

Menu Option	Functionality
Search	• enable search to find Guides and Announcements quicker • set up an integration to have additional resources connected, so users do not have to leave your application
Help	• link users to additional resources such as a help center, support chat, or a communication platform channel such as Slack or MS Teams

You can set this all up under Customize.

Customize the Assistant Look

You can adjust

- the avatar image
- the default colours
- the default texts
- the Help image

You can change the design under **Customize > Design**.

> ℹ View our Working with images article to learn more about image file recommendations.

Assistant Position

Fixed Position

You can customize the Avatar to show it in any corner of your application.

Choose the position that fits the underlying application best and doesn't hide anything.

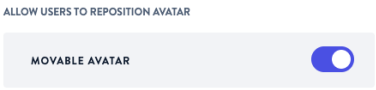
- You can change the position under **Customize > Assistant**.



Movable Avatar

Sometimes the Assistant avatar gets in the way of important UI elements. Thus, we also offer the option to have a movable avatar.

- You can turn on the movable avatar under **Customize > Assistant**.



- Users can move it by hovering over the Assistant avatar, click-hold, then dragging and dropping it from any of the six suggested spots.
- The avatar position will remain in the selected position until the user drags it into another one, or until the feature is turned off.

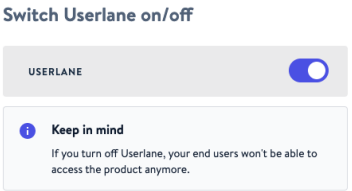
> ⚠ **Limitations**
>
> - If the underlying app has event listeners in place that target drag events, the event listener may block the avatar mobility from working.
> - If the Avatar Reposition toggle is turned off under ***Customize > Assistant***, then the assistant will return for all users to the default position specified in the Portal.
> - If a user has enabled cookies to be deleted after each session, the assistant will go back to the default position specified in the Portal.

General Settings

The following options are available on your application's *Settings* page in the Portal to customize the Avatar behaviour.

Switch on the entire product for your end users

Settings > General > Switch Userlane on/off



With this setting, you can deactivate Userlane Content for your end users. You will still be able to use the Editor.

Hide Userlane for your end users who signed up prior to this date (and time)

Settings > General > Hide Userlane from users who signed up after a specified time

If you specify a date and time here, only end users who signed up for your service after this date and time will be able to see your Guides. This requires some changes in your code snippet. Read this article to learn about the required changes in the snippet.

Hide Userlane on screens smaller than a specific size

Settings > General > Hide Userlane on screens smaller than a specified size

You can define the minimum width of screens in px. The recommended size for a mobile screen is 769px. On screens smaller than this width Userlane will not be available for your users. When left blank Userlane will be shown on all screen sizes.

Target specific application areas

Settings > General > Target specific application areas

Specify where Userlane Suite content should be available in your application. Your users will see it in the areas indicated in the segment. Check this article to learn more about Page Segments and this article to explore User Segments.

Manage your Team

Last Modified on 25.03.2026

What it is

Under your Team settings you can

- invite other team members to help you create, edit, and manage your Userlane content
- update existing ones
- check out your current team
- enable 2-factor authentication
- set up and enable single sign-on for Managers

Why use it

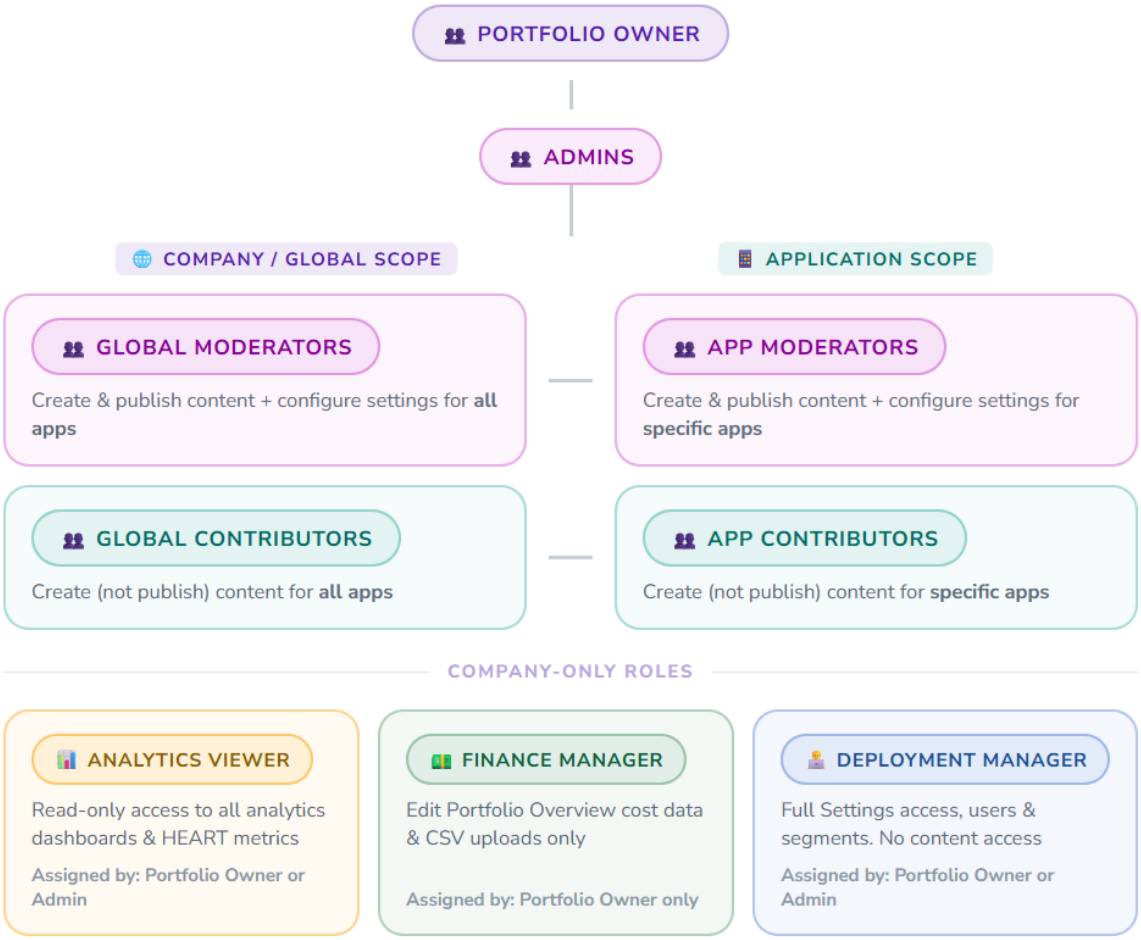
By utilizing team settings and user roles, you can streamline collaboration and enhance productivity within your Userlane environment. Customizable permissions let you maintain control over access levels, optimize workflows, and effectively manage your content.

ℹ Important

- Only Portfolio Owners and Admins can invite team members.
- The Team Members are not visible to your end-users.
- If a limit for your team is reached, reach out to your Customer Value Manager.

Overview of User Roles

Userlane offers seven distinct roles. Four roles are scoped to specific applications, while three are company-level only roles designed for specialized functions.



Role	What they can do	Assigned by	Scope
Admin	Full edit rights everywhere. Can manage and invite team members. No Portfolio Overview access.	Portfolio Owner or other Admins	Company role
Portfolio Owner [Coming soon]	All Admin capabilities plus exclusive Portfolio Overview access (including cost data).	Userlane CVM	Company role
Moderator	Create, publish, and configure content. Company-wide or app-specific scope.	Admin	Company or App
Contributor	Create (not publish) content. Read-only analytics. Cannot see Segments or Customize.	Admin	Company or App

Analytics Viewer	Read-only access to all analytics dashboards and HEART metrics. No content access.	Portfolio Owner or Admin	Company
Finance Man	Edit Portfolio Overview cost data and CSV uploads only. No individual app access.	Portfolio Owner	Company
Deployment Manager	Full Settings access, user and segment management. No content or analytics access.	Portfolio Owner or Admin	Company

Admin

Admins have full edit rights anywhere in the platform and can manage and invite other team members.

Key change: Admins no longer have access to the Portfolio Overview page.

 Full content creation and editing (Editor)

 Publish content

 Invite and manage team members

 View analytics

 Application and company settings

 Portfolio Overview (/applications/portfolio-overview)

Portfolio Owner

The Portfolio Owner has everything a normal Admin has, plus exclusive access to the Portfolio Overview page, including cost information. This role is designed to safely handle sensitive financial data that was previously visible to all Admins.

 All Admin capabilities

 Portfolio Overview (/applications/portfolio-overview)

 Cost and currency data (Company Metadata endpoint)

 Invite and manage team members

 Editor and content creation

 Assign Analytics Viewer, Finance Manager, Deployment Manager roles

 Import / export texts

Moderator

Moderators can create and publish content and configure application settings. They can be scoped to all applications (global) or to specific applications.

 View team members and other company level settings (Company Moderator only)

 Create and publish content - all apps (Company) / assigned apps (App)

 Configure application settings - all apps (Global)

 View analytics - all apps (Global) / assigned apps (App)

 Import / export texts

 Add or edit team members Edit company user profiles App Moderators cannot see company level settings

Contributor

Contributors can create content but cannot publish it. Their view is limited — they do not see the Segments or Customize sections.

 Create content — all apps (Global) / assigned apps (App)

 Auto translate — all apps (Global) / assigned apps (App)

 Publish content Take screenshots in Editor View analytics (basic) View HEART analytics Import / export texts

Analytics Viewer

The Analytics Viewer provides managers and leadership with visibility into performance data without any risk of content or configuration changes. This is the most requested new role. It is a company-level role, so the user gets access across all apps automatically.

Analytics Overview (/analytics/overview) including Segment analysis

 Analytics Content (/analytics/content)

 HEART metrics (/analytics/heart)

 Applications list (/applications/overview) — read only

 App Discovery (/applications/app-discovery) — read only

 Generate API key and access data via API

 Personal details and API token settings

 Segments — read only (user count shown, no user preview)

 Page Segments — read only

 Add an application Portfolio Overview (/applications/portfolio-overview) Editor and content creation Messages, Users, or other Settings pages Attributes Alert notifications (switched off by default)

Finance Manager

The Finance Manager allows finance teams to maintain application cost data and upload CSVs without accessing any individual application, content, or analytics. Access is limited strictly to the multi-app (portfolio) level.

 Portfolio Overview — view and edit, including cost data and CSV uploads

 Applications list (/applications/overview) — view only

 App Discovery — view only

 Personal details settings

 Open individual applications Add an application Analytics pages Editor and content creation Any Settings beyond personal details Alert notifications (switched off by default)

Deployment Manager

The Deployment Manager (also known as IT Admin or Technical Rollout Manager) is built for IT and technical teams during the initial platform rollout. It provides full access to all Settings pages so they can configure everything, without touching content or analytics.

 General settings (/application-settings/configuration)

 Agentic Assistance / Copilot (if feature flag is on)

 Application URLs and Snippet setup

 Selectors (/application-settings/selectors)

 Team management — view only, cannot invite members

 File transfers (/settings/company/processes)

 Company users and attributes

 Integrations (/settings/company/integrations)

 Analytics settings (/settings/company/analytics)

 Browser Extension settings (/settings/company/browser-extension)

 Personal details and API token

 Users, Segments, and Attributes pages (/users/*)

 Editor and content creation Analytics dashboards and reports Guides, Customize, App Discovery, or Portfolio Overview Guide Alert notifications

Configure 2-Factor Authentication (2FA)

Last Modified on 27.11.2023

What it is

2-Factor Authentication (2FA) is an additional security layer in the login flow for Userlane Manager Users. Once enabled, Managers will be prompted to configure 2FA with their Authenticator App of choice.

They will then need to enter an authentication code after providing their username and password to access the Userlane Portal.

Why use 2FA

There are 3 commonly accepted Authentication Factors:

1. Knowledge: Something you know, like a password.
2. Possession: Something you have, like a smartphone with an authenticator app.
3. Inherent: Something you are, like your fingerprint or faceID.

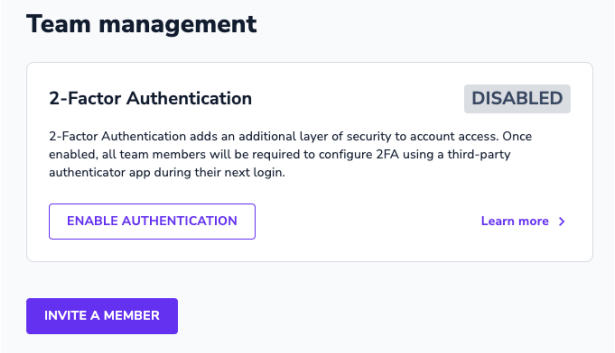
2-Factor Authentication requires the use of two of the above three authentication factors for login. At Userlane, the two authentication factors needed are **Knowledge** (your password associated with your email address) and **Possession** (the Authentication Code generated by your authenticator app).

Userlane 2FA supports the use of the following 3 authenticator apps:

- **Microsoft Authenticator**
- **Google Authenticator**
- **FreeOTP**

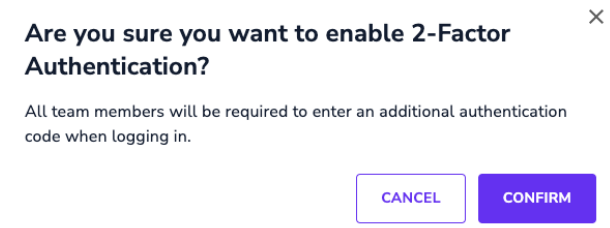
How to Enable 2FA

On the Team Management page in the Userlane Portal, Managers with the Admin Role will see the option to enable 2FA for all Team Members in their Userlane company.



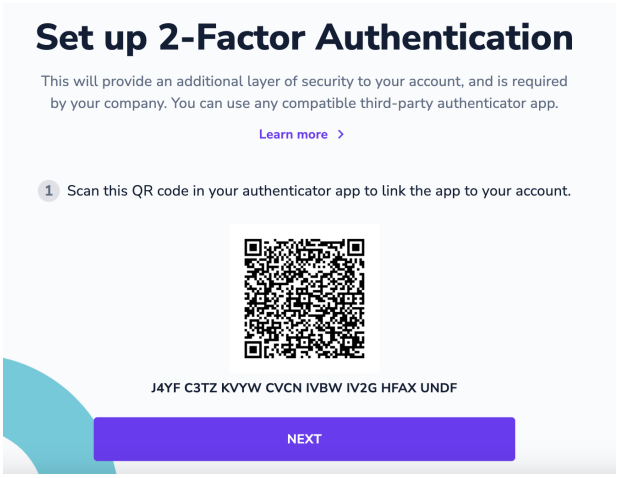
After clicking 'Enable Authentication', Admins will be asked to confirm that they want 2FA enabled for their

Team Members.

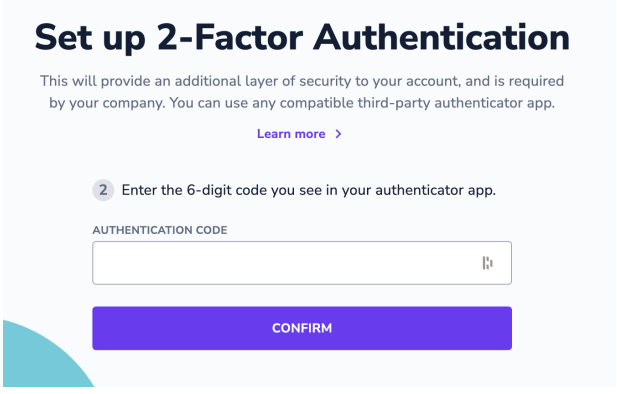


How to Set Up 2FA

Once enabled, all Team Members in that company will be prompted to set up 2FA during their **next log-in** to the Userlane Portal. After entering their username and password they will be prompted with:

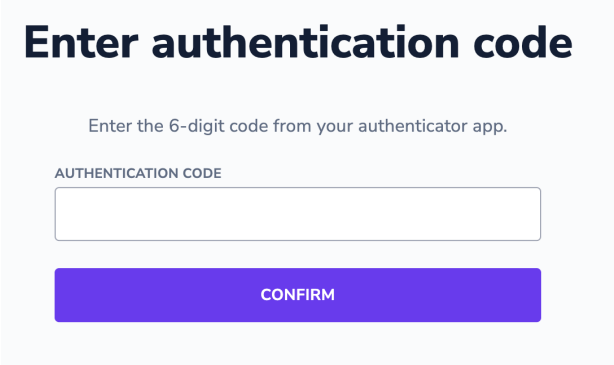


Userlane Managers will then need to configure 2FA with their preferred authenticator app by scanning the QR code with their app or manually entering the alphanumeric code. They will then be prompted to enter their authentication code in order to complete the login process.



Note: if you accidentally enter the code incorrectly when setting up 2FA, you will be prompted to scan the QR code again in order to generate a new authentication code for set up.

Once enabled and configured, managers will be prompted to enter their authentication code every time they log in to the Userlane Portal as shown below.



Disabling and Resetting 2FA

Admin Users can also disable 2FA for all Team Members in their organization or reset the 2FA configuration process for individual team members, for example, in case a User has lost the phone they used to configure 2FA with an Authenticator App. These settings can also be found on the Team Management page.

Single Sign-On for the Userlane Portal

Last Modified on 29.12.2025

What is it?

Single Sign-On (SSO) allows users to authenticate with multiple applications using just one set of credentials. In the context of Userlane, we have two separate SSO configurations:

- Single Sign-On for Managers concerns access to the Userlane Portal, where Managers can add new applications to Userlane, view HEART and content analytics data, as well as manage Userlane content and customize their Userlane application.
- Single Sign-On for End Users authenticates users to see and interact with the Userlane Assistant as well as contribute to HEART data. To set up SSO for End Users please read on here.

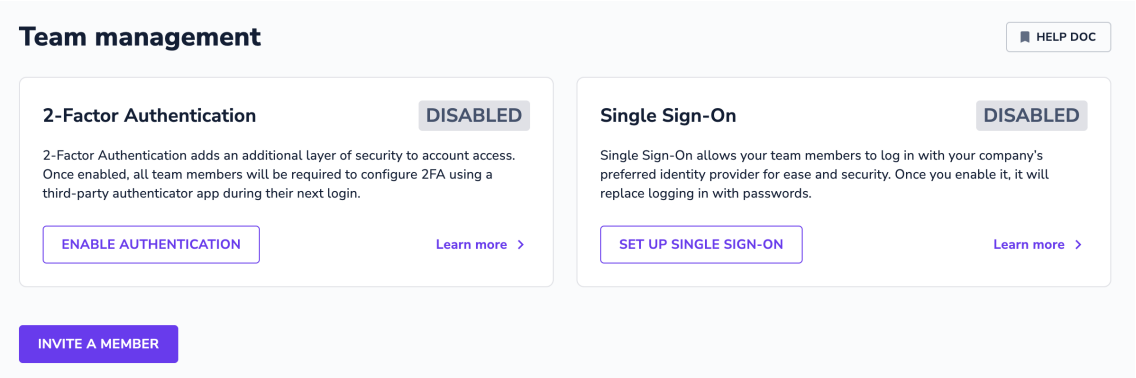
Why use SSO for Managers?

SSO is a secure way to authenticate Userlane Managers that offers two key benefits once enabled:

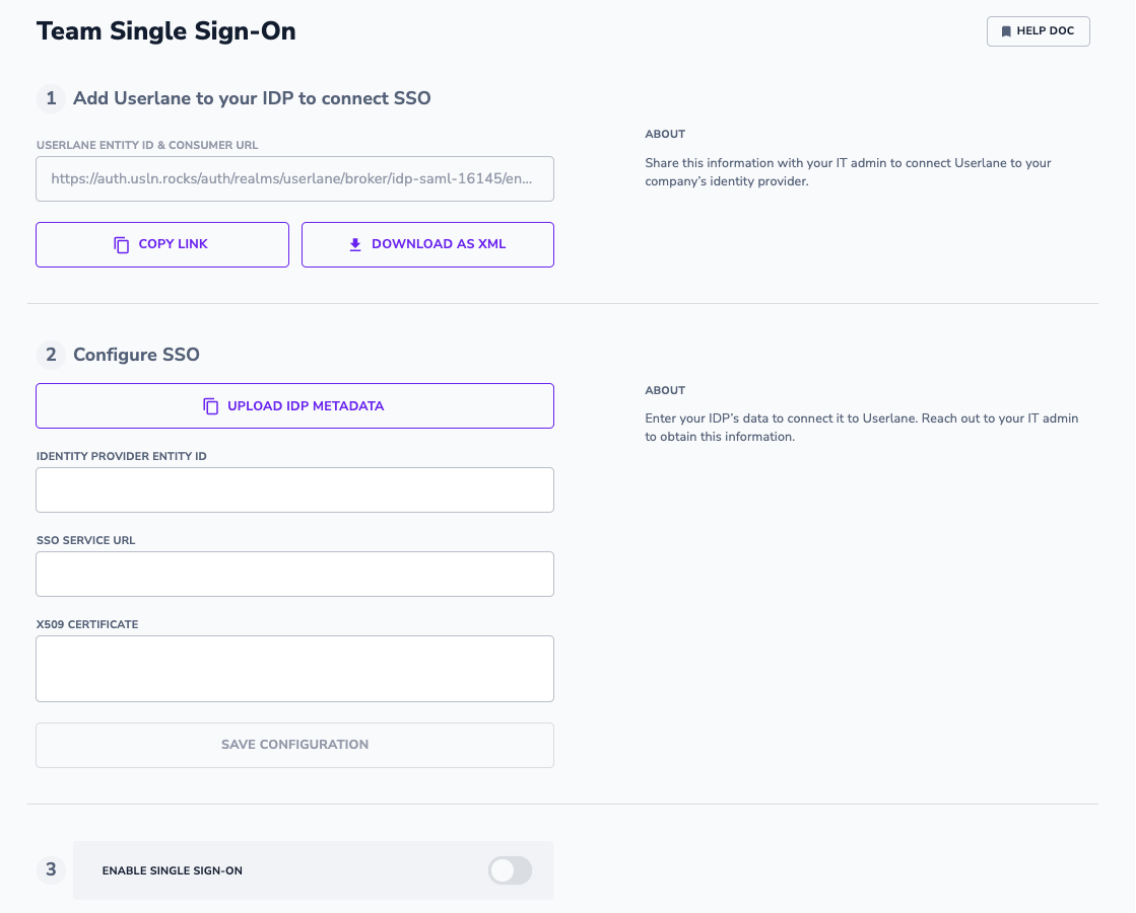
- **Central User Management:** With SSO enabled, IT Admins can centrally manage who has access to the Userlane Portal. For example, if a user leaves the company, their access can be centrally disabled in the company's Identity Provider and Access Management tool.
- **Increased Security:** SSO also increases security to business-critical data such as that found in the Userlane Portal. By authenticating with one set of credentials, the risk of compromised passwords leading to data breaches is heavily reduced.

How to set up & enable SSO for Managers

On the Team Management page in the Userlane Portal, Managers with the Admin Role will see the option to enable SSO for all Team Members in their Userlane company.



After clicking 'Set Up Single Sign-On', Admins will be directed to a new page to complete the set up and enable SSO. As shown below, there are 3 steps to setting up and enabling SSO for Managers.



Step 1

To configure SSO, you must first add Userlane as a trusted application to your Identity Provider (IdP). In this step, you are provided with the metadata needed to do so. You can access that metadata either as a link or by downloading it as an xml file. Please pass it along to your IT team who can add Userlane as a trusted application.

Please make sure that you use the email as identifier.

Helpful links from common Identity Providers:

- Microsoft Entra ID
  - Add an Enterprise Application
  - Enable Single Sign-On with SAML

ℹ If you plan on triggering Userlane from the Microsoft MyApps Portal, make sure you add https://family.userlane.com as the Sign-On URL in the Entra ID configuration.

- Google Workspace
  - Set up your own custom SAML App
- OneLogin
  - SAML Custom Connector (Advanced)

ℹ For OneLoginensure that: (1) the Recipient field is filled with the EntityID URL; (2) the Login URL is filled with https://family.userlane.com; and (3) the SAML Initiator setting needs to be changed to 'Service

Provider'

- Microsoft ADFS
  - Create a Relying Party Trust
  - For AD FS, you must add a claim Rule to your configuration. Please refer to this article on how to do so.

Step 2

In step 2, you need to add the metadata from your own Identity Provider in Userlane to establish the SSO connection. There are two ways to do so:

- If you received the metadata from your IT team in the form of an xml file, you can simply click 'Upload IDP Metadata' and select the MetaData.xml file from your file explorer. This will auto-fill the form fields for you with the right information.
- You can also enter the metadata information manually into the form. Or edit the information as needed, for example, if you need to update a SAML certificate.

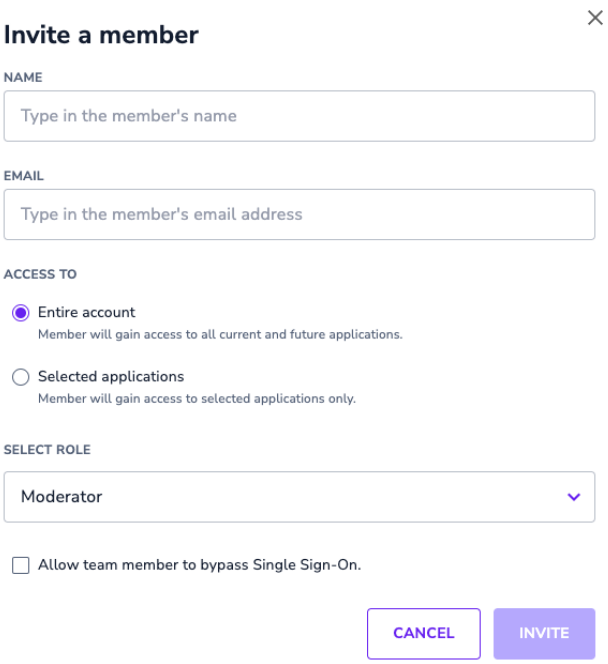
After the metadata has been entered, be sure to save your configuration. Upon saving, the metadata you entered will be saved in the Userlane Portal but SSO will **not be enabled.**

Step 3

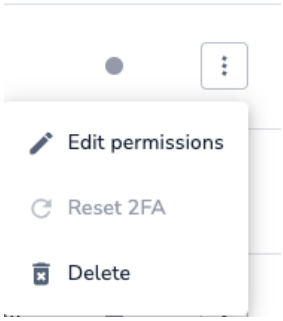
In step 3 you can enable SSO for Managers when you are ready. Once enabled, the SSO login flow will be activated for your Userlane Team. All users will be required to authenticate with Userlane via SSO, except for those who have been marked as being able to 'Bypass SSO'.

Bypass SSO

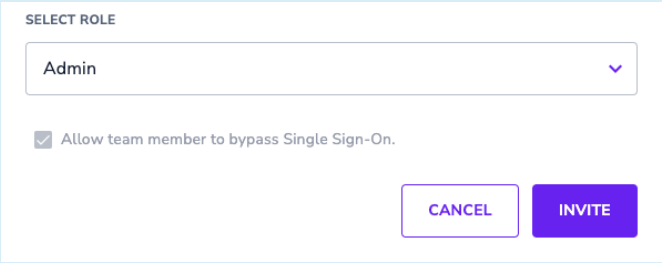
Admins can determine if any of their Userlane Team Members should be able to bypass SSO and still log in to the Userlane Portal with their email and password. For new users, you can activate this setting when inviting them to Userlane for the first time.



For existing users, if you would like to activate the bypass SSO setting, simply edit their permissions by clicking on the 3 dots next to their user entry and open the permissions window.



By default, this setting is active and cannot be deactivated for Admins!



Why would I activate bypass SSO?

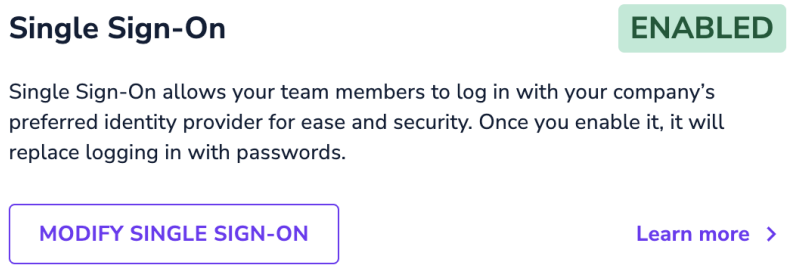
There are two primary use cases for which the bypass SSO setting is used:

- In the event that the SSO connection does not work, it is necessary that at least one Manager can access the Userlane Portal in order to update or deactivate SSO and allow other Managers to access the Portal.
    - As SAML certificates often need to be updated, it can happen that the SSO configuration has expired and needs to be updated with a new certificate from your identity provider.

    - This is why Admins have bypass SSO activated by default.
- If your company works with any external contractors or consultants to manage Userlane, it is possible that these users are not managed in your identity provider, meaning that SSO will not work for them. To ensure that they can still access the Userlane Portal, we recommend that bypass SSO is activated for them.

Modify or Disable SSO

Once SSO for Managers is enabled, Admins can easily and quickly Modify the SSO configuration from the Team Management page.



Upon clicking 'Modify Single Sign, Admins are brought to the configuration page where they can:

- Edit the existing configuration
- Delete the existing configuration
- Disable SSO using the toggle at the bottom of the page

Deleting the configuration will permanently remove the IdP metadata from Userlane!

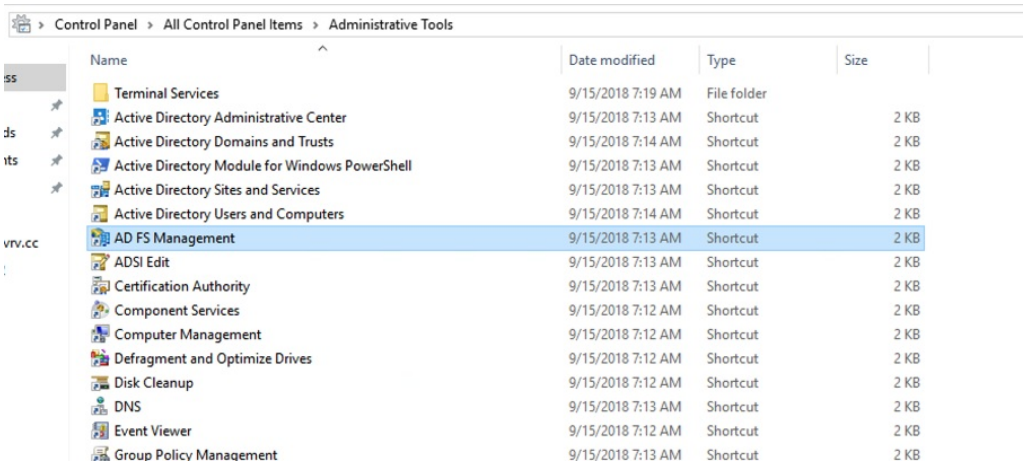
Portal SSO: Transform UserPrincipalName to NameID

Last Modified on 03.05.2024

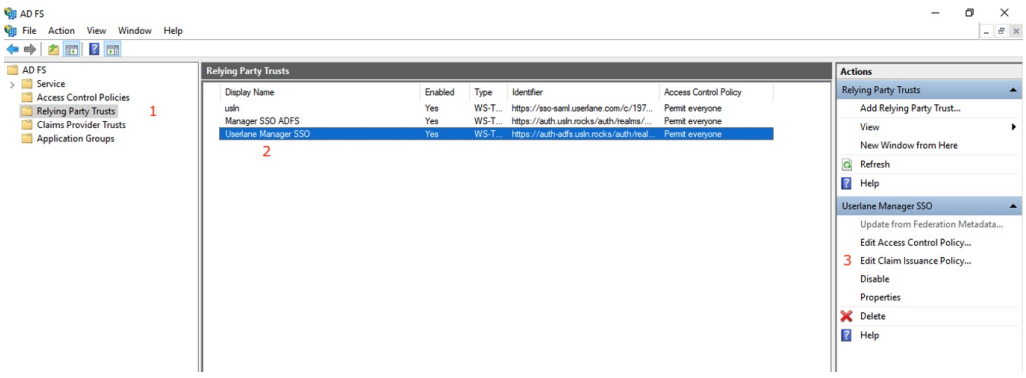
To successfully configure Single Sign-On (SSO) to the Userlane Portal using Microsoft ADFS as your Identity Provider (IdP), you must add a Rule to the Claim Issuance Policy of the Relying Party Trust you created for Userlane.

To do so, follow the steps outlined and shown below:

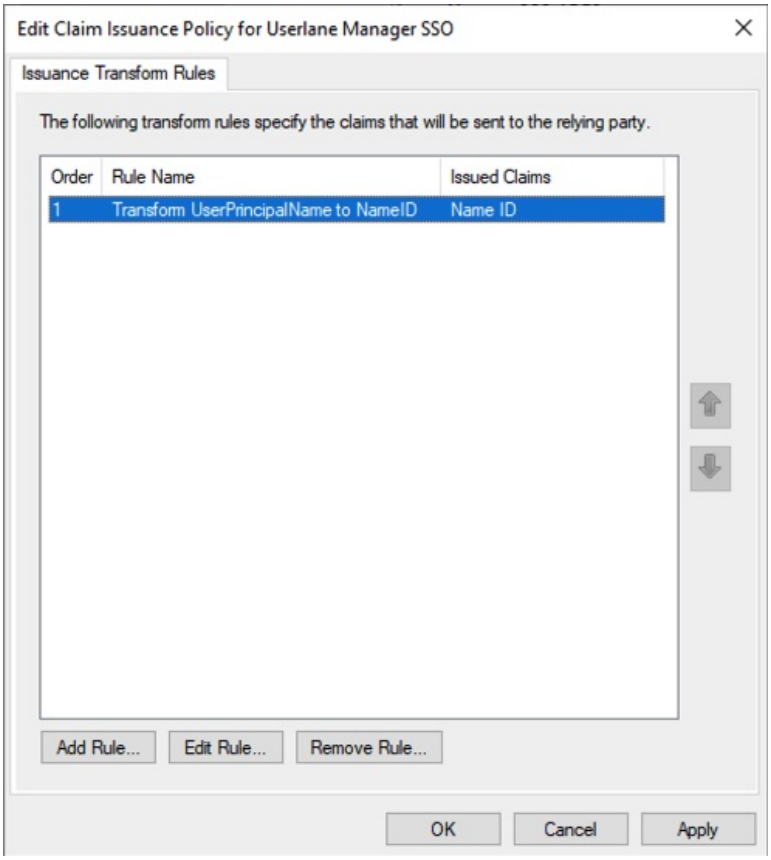
1. Go to the Control Panel > All Control Panel Items > Administrative Tools and open the AD FS Management



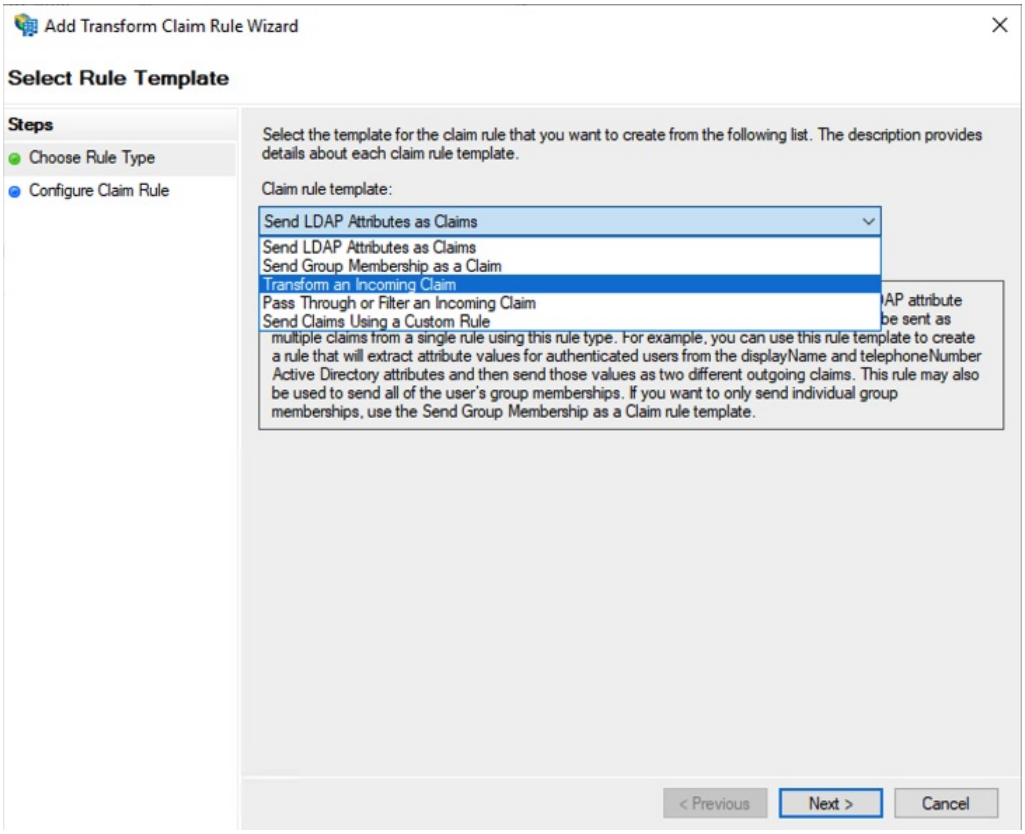
2. On the left column, select Relying Party Trust, select your Userlane configuration and click on Edit Claim Issuance Policy on the right column.



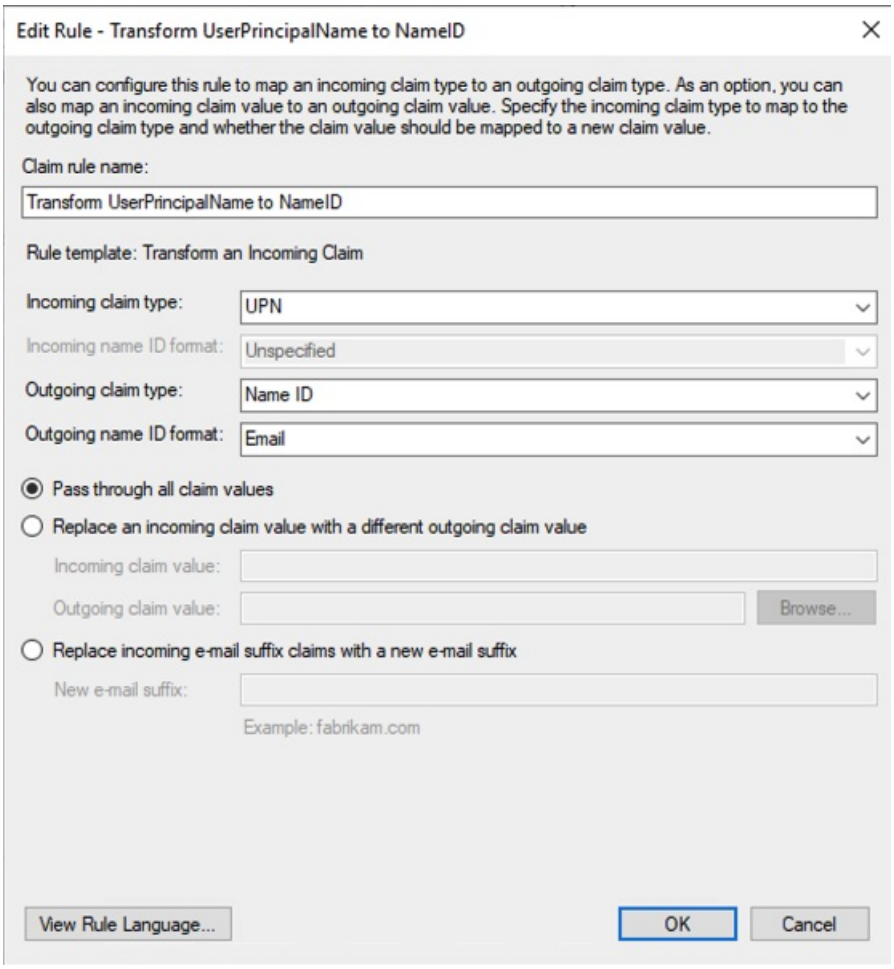
3. In the new window, click on Add Rule



4. Then select Transform as Incoming Claim from the dropdown and click on Next



5. In the next screen complete the following form and press OK:
    1. Claim rule name: Transform UserPrincipalName to NameID
    2. Incoming claim type: UPN
    3. Outgoing claim type: Name ID
    4. Outgoing name ID format: Email
    5. Select “Pass through all claims”



Implementation Options Overview

Last Modified on 09.02.2026

This article outlines the different possibilities that exist to implement Userlane into your IT landscape or a specific application.

Userlane Browser Extension

Overview

The Userlane Browser Extension provides a **scalable, secure way** to make interactive guides available without modifying your application's source code. It supports analytics and advanced user targeting.

There are two different scenarios when choosing the Browser Extension as your preferred implementation option:

- **Seamless Rollout**

Best for: Full-scale adoption across your entire organization.

How it works: Users are authenticated automatically with **Single Sign-On (SSO)** and the extension installs silently without manual steps.

Benefits:

Centralized deployment

Secure authentication

Rich insights via user attributes

Requirements:

SSO configured for your environment

Central extension rollout

Supported browsers: Firefox 109+, Chrome 88+, Edge 88+

- **Manual User Invitation via Email**

Manual User Invitation (Ideal for Testing & Small Groups)

- **Best for:** Pilot groups, QA teams, or small deployments.
- **How it works:** Upload selected users to the Userlane Portal → they receive an invitation email → users

install the extension manually.

- **Benefits:** Great for controlled testing before a larger rollout.
- **Requirements:** Same browser support as seamless rollout.

Userlane Snippet

Overview

If you have access to your application's source code, you can embed Userlane using the**JavaScript snippet**. This method makes Userlane available immediately when the application loads — no extension required.

> **Good to know**
>
> The manually installed browser extension can still be used in the early stages to build and test your first Guides. Userlane will be shown in the application independent of the browser. Check this article to see how to import users to use the browser extension for testing.

Benefits

- Userlane loads directly in the application (independent of browser extension)
- Full analytics and segmentation capabilities
- Works across major browsers and supports deeper integration into workflows
- Great choice for internal apps or custom platforms where you control the codebase.

Requirements

- Ability to deploy custom JavaScript
- The app must operate from a **single domain**
- Supported browsers:
    - Edge 79+, Firefox 60+, Chrome 70+, Safari 12+

> ⚠ Please note that App Discovery does not work for a Snippet implementation.

Adding hosts to your Content-Security-Policy (CSP) for Userlane

Last Modified on 22.10.2025

About Content Security Policies (CSP)

A Content Security Policy (CSP) is a security mechanism implemented by web applications to mitigate the risk of various types of attacks.

It allows to define a set of policies that specify which sources of content, such as scripts, stylesheets, images, and fonts, are allowed to be loaded and executed within their web application. By restricting the origins of content, CSP helps prevent the execution of malicious scripts or the loading of unauthorized resources, thereby enhancing the overall security of the application.

If you are using Content Security Policies (CSP) to protect your Application, you need to add some policies to make sure Userlane can work correctly and can be shown to your users.

Allowing the script execution for userlane.com

Add the following hostnames to your CSP `default-src` , `script-src` , `style-src` , `img-src` , `connect-src` , and `font-src` attribute:

```
https://*.userlane.com
https://*.sentry.io
https://*.amplitude.com
```

This allows all userlane.com images, scripts, fonts, and styles to be loaded into your Application. This is necessary to make sure Userlane can function correctly.

ℹ We use Sentry for monitoring real-time our Application's code health.

ℹ Amplitude captures interactions with Userlane elements in the Editor and Portal to drive continuous product improvement and deliver greater customer value.

Cross-Origin iFrame support in Userlane

Last Modified on 11.05.2026

What is a Cross-Origin iFrame

A Cross-Origin iFrame is a section of your application (your page) hosted on a different domain or server and injected into your application via an iFrame element.

What is it used for

Another application can be displayed within another application in a dedicated section of the page without the need to open it in a separate tab.

Installation for Snippet customers

Cross-Origin iFrame support is available for customers implementing Userlane with a snippet. The Userlane code (userlane.js) needs to be implemented in the main application, and the application added via the iFrame.

To activate the Editor for the iFrame section, the domain of the iFrame application needs to be added to the Userlane Portal.

> ℹ For the iFrame snippet, use only the userlne.js loading part. Do not implement any additional commands like *init* or *identify* here.

Support for Browser Extension customers

We support the cross-origin Iframes in the Userlane Browser Extension as well. No further implementation is required; ensure that the URL of the iFrame application is added to the App URL list in the Userlane Portal. Check out how to set up your application URL here.

> ℹ To activate the support for Cross-Origin iFrames, please get in touch with your Customer Value Manager.

SSO Implementation

Last Modified on 14.01.2026

About SSO

Single Sign-On is a convenient, yet secure way of authenticating a user.

Most customers are already running an Identity Provider (IDP) that supports Single Sign-On through the SAML 2 protocol, e.g. Active Directory, OneLogin, or Okta.

Benefits of using SSO

Integrating SSO into Userlane makes sure that

- your user can benefit from its content by using credentials they are using each day and in multiple places
- Userlane is silently and seamlessly rolled out to all end users
- your users do not have to do anything in order to see Userlane.

How it works

In the following section, we refer to three different stakeholders who need to align in order to get the integration up and running smoothly:

Company IT Administrator	Company Application Owner	Userlane Customer Value Manager
Sets up the installation on the customer's side.	Has requested that Userlane runs on their application	Point of contact at Userlane for the installation and person who supports App Owner regarding any requirements

In concept, this is how users are seamlessly authenticated for Userlane:

User authentication logic

First time authentication is triggered immediately when User opens the browser with an installed Userlane Browser Extension. If the authentication is not successful, the attempt is repeated exponentially (every 2, 4, 8 minutes and further) until it reaches the frequency of 48h. After that the re-try is triggered every 48h until successfully authenticated.

An already authenticated user will try to refresh the user attributes according to the setting in the Userlane Portal. The refresh is done by re-authenticating.

Configuration

1. Receive relevant data

Ensure your IT received the Implementation One Pager provided by Userlane.

Throughout the Configuration your IT will have to provide:

- IDP entrypoint URL
- IDP certificate
- list of relevant and available attributes in SSO
- SSO Window Mode
- SSO Refresh Interval

2. Add Userlane to your IDP to connect SSO

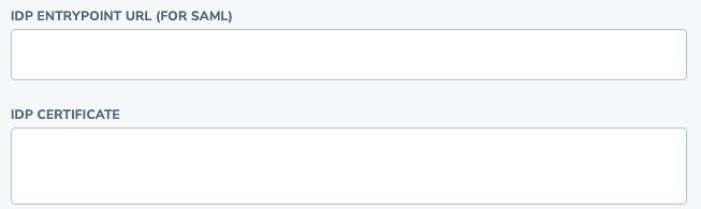
You need to pass the Userlane metadata to your IT.

You can find detailed instructions per provider:

- ADFS
- Azure Active Directory
- Google Workspace

3. Add the Certificate and Entry point URL to the Userlane Portal

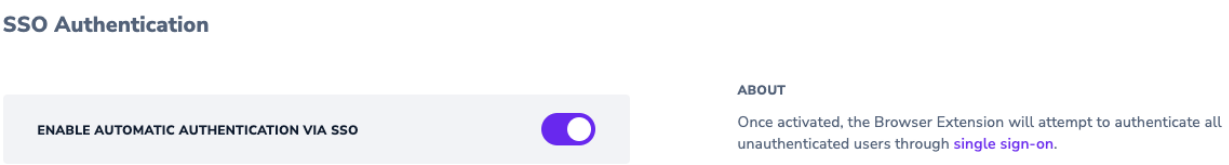
Sign in to **Userlane Portal > Settings > Single Sign On**



4. Authenticating the user via Single-Sign-On

To authenticate the current user towards Userlane, a Single-Sign-On (SSO) flow can be started in a new tab or in the background. Through this, it is also possible to provide more details about a user to Userlane so that specific content can be shown to user segments.

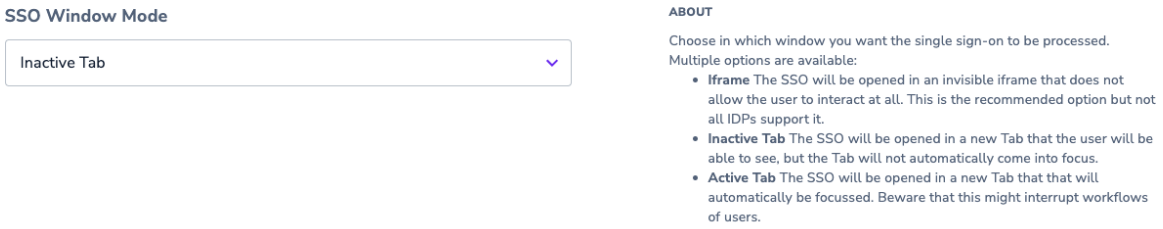
Go to **Userlane Portal > Settings > Browser Extension**



5. Choose the SSO window mode

Choose in which window you want the single sign-on to be processed. Multiple options are available:

- **Iframe** The SSO will be opened in an invisible iframe that does not allow the user to interact at all. This is the recommended option but most IDPs do not support it.
- **Inactive Tab** The SSO will be opened in a new Tab that the user will be able to see, but the Tab will not automatically come into focus.
- **Active Tab** The SSO will be opened in a new Tab that will automatically be focussed. Beware that this might interrupt the workflows of users.



⚠ At a later stage, the authentication will be automatically triggered by the Userlane Browser Extension. Please make sure that all users who receive the extension are able to authenticate via the SSO. This is to avoid users seeing an inactive tab with authentication error. This behaviour may occur e.g. on private browser profiles or for users who are not part of the SSO group.

⚠ EntraID does not support Iframe as Window Mode.

6. Choose refresh interval

Make sure to choose how often you want to repeat the SSO for already authenticated users. This assures that user attributes are kept up to date.

For doing this: sign in to Userlane **Portal > Settings > Browser Extension** then in the dropdown SSO Refresh Interval choose one of the available options.

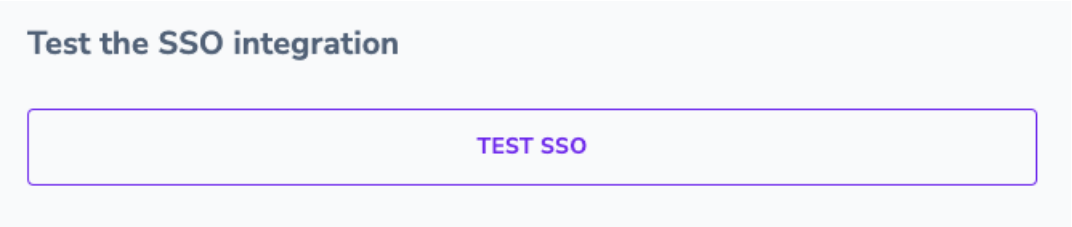
⚠ Choosing the **"Disable Refresh"** option prevents the SSO authentication flow from being re-triggered, meaning updates to user attributes will not be retrieved.

⚠ Keep in mind that the shorter the interval, the higher the load on your IDP will be.

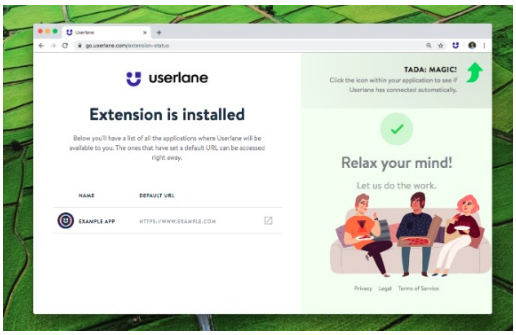
7. Testing the Integration

7.1. Test the integration

Test the SAML connection with the test link under **Userlane Portal > Settings > Single Sign On.**



It should bring the user to your IDP login page or (if they are already logged in to their IDP), then to the Chrome or Edge extension store to install the Userlane BE or (if they already have the extension installed) they are brought to a Userlane page with a list of Userlane properties.



Any of these results mean that SSO has been successfully configured.

If there's an error (e.g. invalid signature, entry point URL missing "SAML"), please review our Troubleshooting List.

Alternatively you can use this link:

https://sso-saml.userlane.com/c/COMPANYID/authenticate

7.2. Review the attributes that are passed on

Once SSO succeeds, validate that your attributes (`region` , `role` , etc.) are correctly passed and available.

Go to **Userlane Portal > Settings > Company Users.**

Click on a Company User and review what information is passed. If any attribute is missing, please add it following the instructions here.

At a Glance

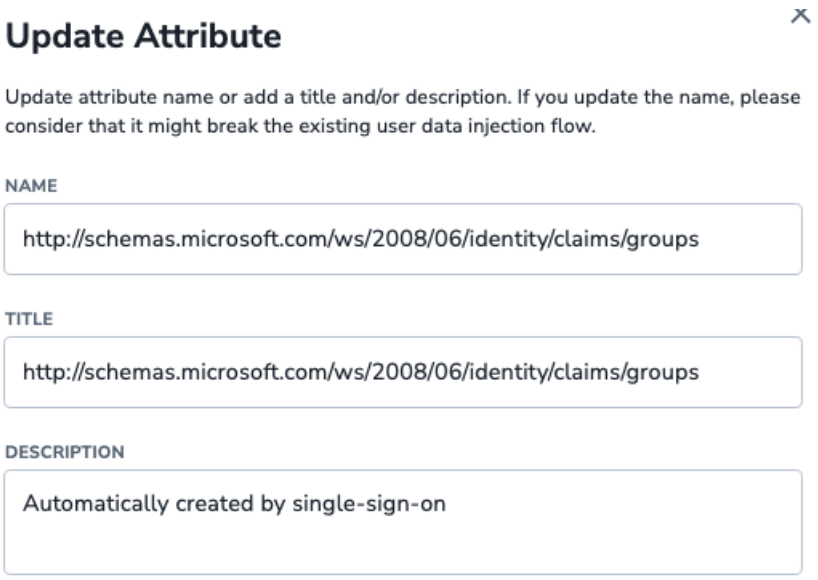
This video outlines the most relevant steps to seamlessly rollout Userlane.

Your browser does not support HTML5 video.

Best Practice

At times, SSO sends data with a long key that makes it difficult to work with when setting up User Segments. You can adjust the title of any attribute under **Userlane Portal > Settings > Company Attributes**

Click on the attribute and change the title.



Setting up Single Sign On with ADFS

Last Modified on 29.12.2025

Single Sign-On is a convenient, yet secure way of authenticating a user. Most customers are already running an Identity Provider (IDP) that supports Single Sign-On through the SAML 2 protocol, e.g. Active Directory, OneLogin, or Okta.

Userlane can accept authentication via the SAML 2.0 Protocol.

Of the many implementations of this protocol, Microsoft Active Directory Federation Services (ADFS) is one of the most widespread. In this scenario, an ADFS server acts as the Identity Provider (IDP) and Userlane as the Service Provider (SP).

Requirements

- access to ADFS
- access to Userlane Portal

In order to configure the Single Sign-On for Userlane, follow these steps below:

1. Adding Userlane as a Service Provider (SP) to your IDP

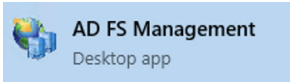
For the company's IDP to accept authentication requests by Userlane, the IT Admin must first register Userlane as a Service Provider (SP).

ℹ The Userlane Service Provider Metadata differs for each customer. Your Userlane SA will provide you with a .xml file to import into your ADFS Server.

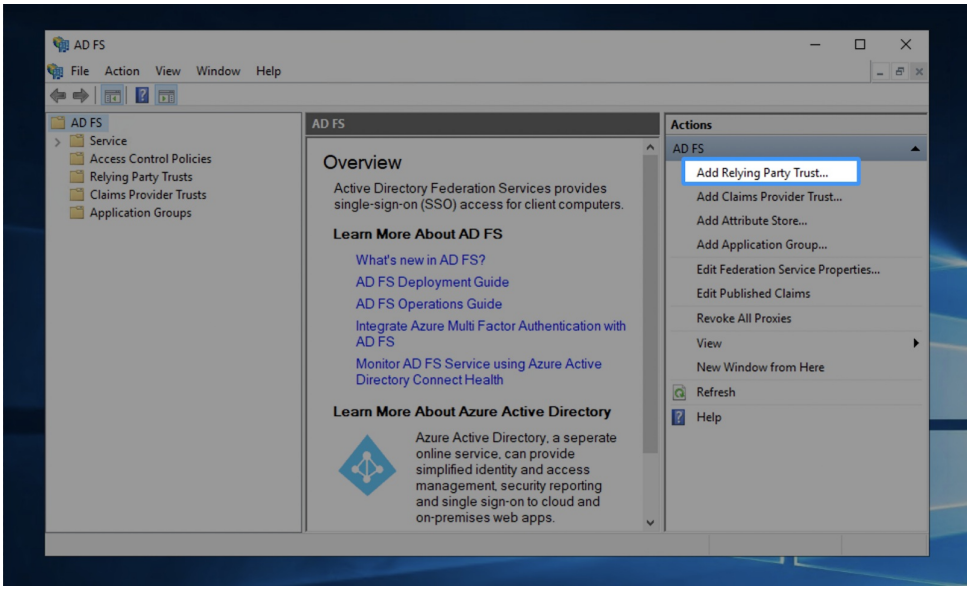
Registration steps:

1. Download the Metadata file onto your ADFS Server

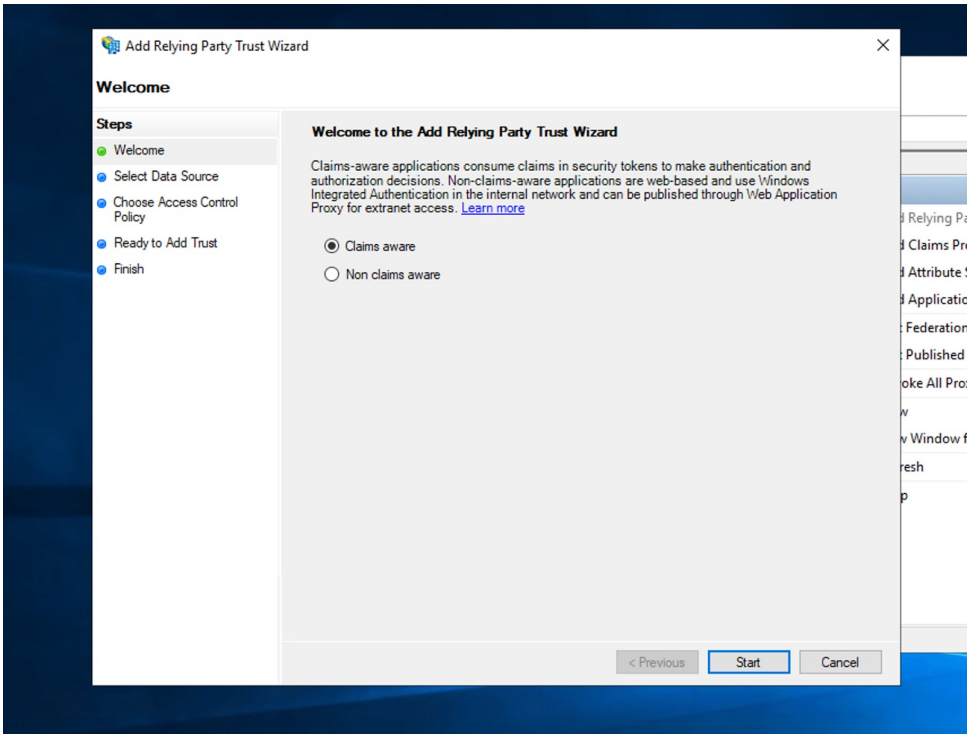
2. Open the "AD FS Management" app



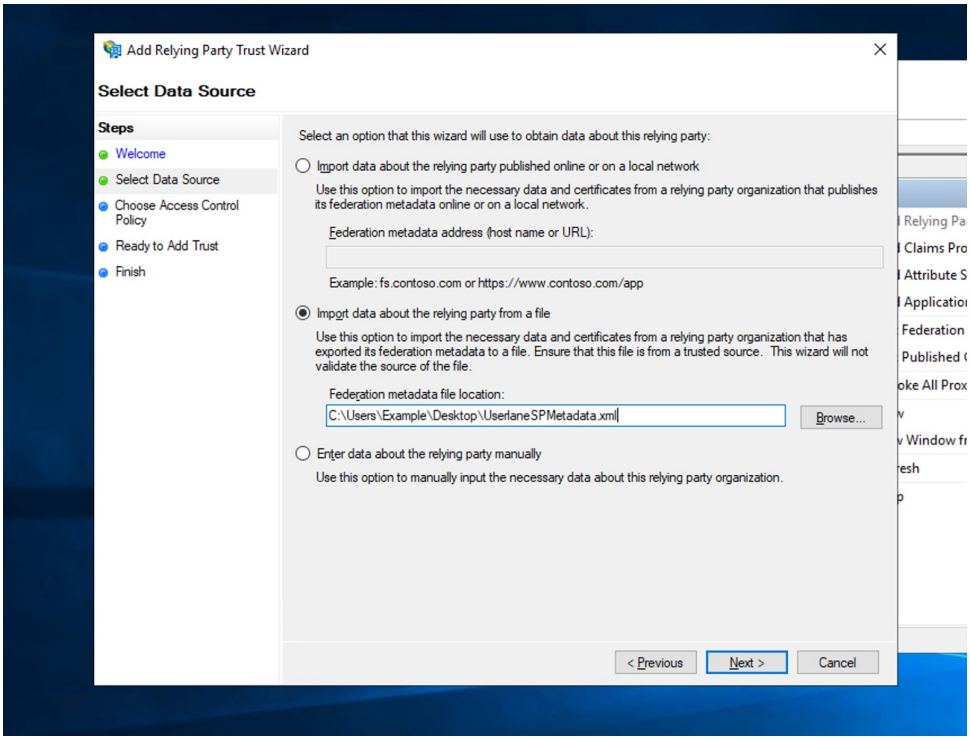
3. In the menu on the right, select "Add Relying Party Trust"



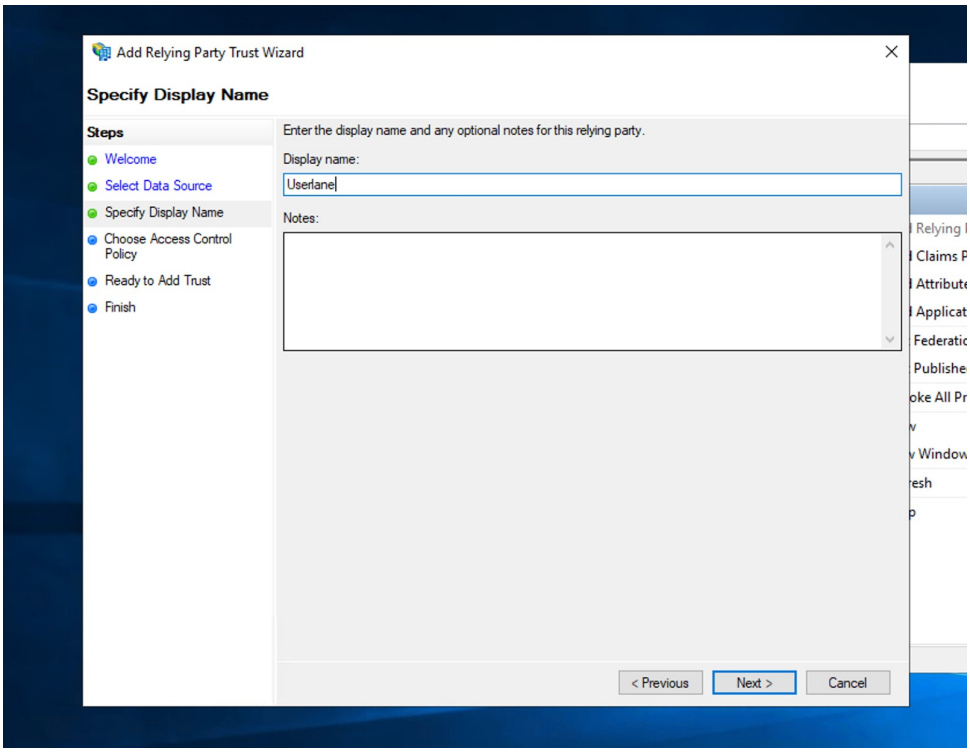
4. Select “Claims aware”



5. Select the Metadata file you’ve downloaded or follow the instructions for manual setup below



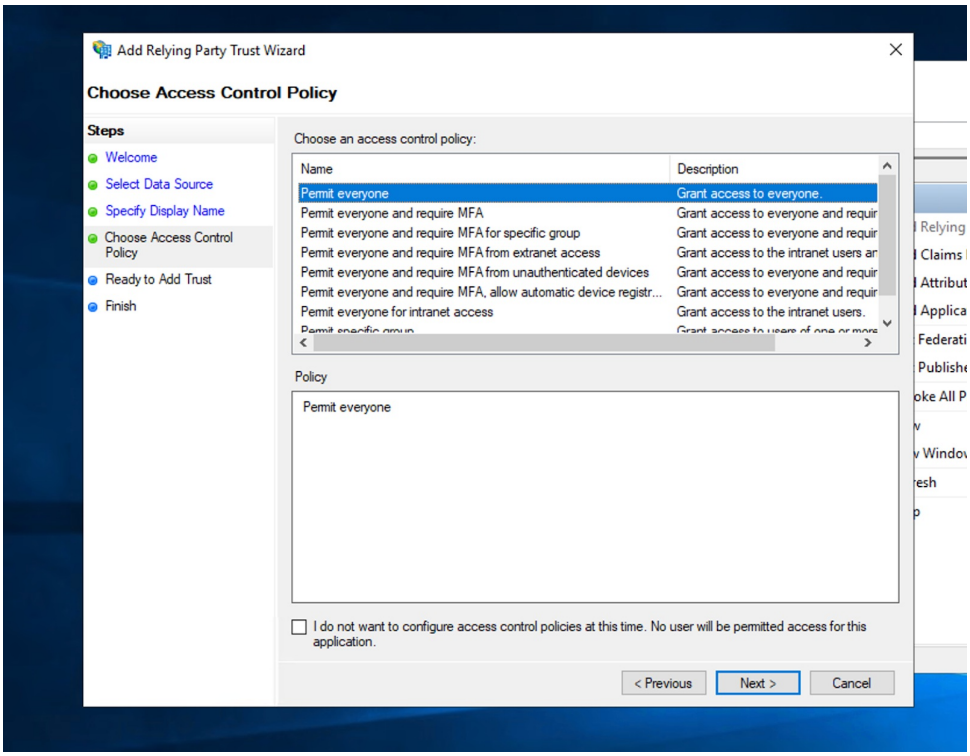
6. Specify any display name or description you like



7. It is essential to configure which employees are targeted for Userlane.
In general, any employee who has access to the connected application that uses Userlane for enablement purposes should also have access to the Userlane app. However, we recommend that App Owner confirms the target group after consulting with SA to avoid any misunderstanding.

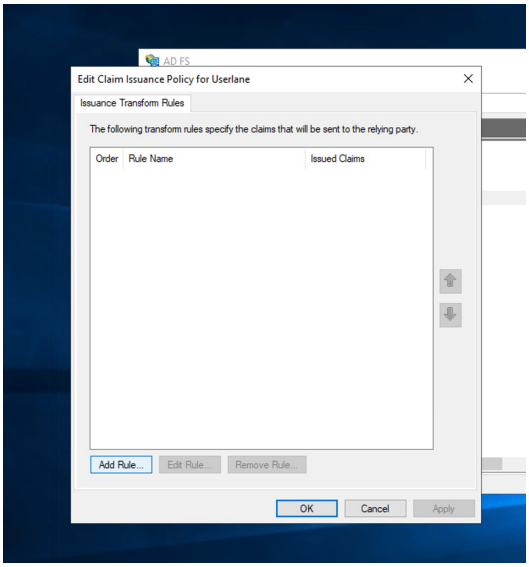
Note: Do not configure MFA (Multi-factor Authentication) as a requirement in order to make the sign-in easier

and seamless for your users.

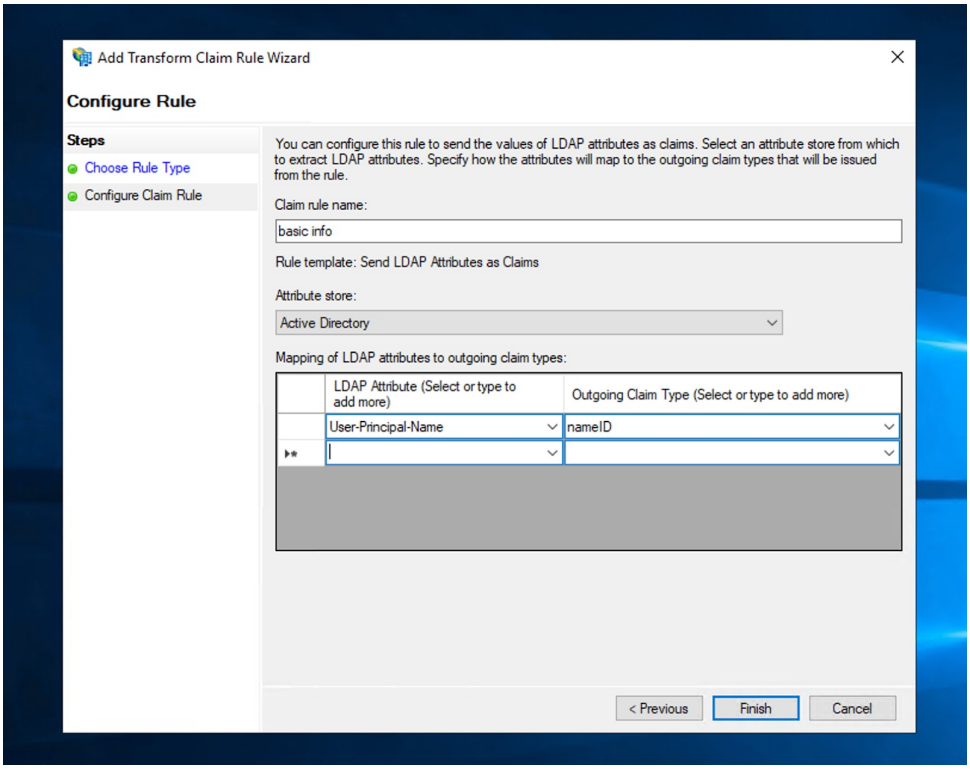


8. Confirm in order to add the Trust and continue with configuring a claims issuance policy for your application

8.1. Select “Add Rule”



8.2. Userlane requires a “nameID” (**please keep the exact letter-case form**) in the Outgoing Claim Type. This will be the unique identifier on Userlane level and it is the only mandatory attribute required. This ID must be unique for each user and is not meant to be changed over time in order to keep historical information clean.



Additional user information required by App Owner for improved targeting is explained in the article Expanding the Settings

Save and apply the Claim Rule.

2. Add information to Userlane Portal

Continue with step 3 from the article on setting up SSO for Userlane.

Installing and Configuring the Browser Extension for Microsoft Edge on Windows (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via a MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

Browser Extensions in Edge can be installed and configured through Enterprise Policies. Refer to the official documentation at https://docs.microsoft.com/en-us/deployedge/microsoft-edge-policies#extensions-policies for more info.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- IT Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token in Userlane Portal

Steps to Complete the Setup

1. Installation and Configuration
2. Verification

1. Installation and Configuration

1.1 ExtensionInstallForceList browser policy

Add the Userlane Extension (ID for Edge: joephgegnilhnnnocnkigpmmamgghage)
to the ExtensionInstallForceList: https://docs.microsoft.com/en-us/deployedge/microsoft-edge-policies#extensioninstallforcelist to install the Userlane Extension from the Edge Add-ons.

Example registry file

```
Windows Registry Editor Version 5.00
[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft\Edge\ExtensionInstallForcelist]
"1"="joephgegnilhnnnocnkigpmmamgghage"
```

Note: The Registry Key might need to be modified if multiple Browser Extensions (other than Userlane) are installed to Edge.

1.2 Browser Policy Configuration

Registry keys in the path.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft\Edge\3rdparty\extensions\joephgegnilhnnnocnkigpmmamggghage\policy
```

All keys should have type REG_SZ.

Please note that you need to get the correct **companyId and region** from your Customer Value Manager!

Example registry file:

```
Windows Registry Editor Version 5.00
[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft\Edge\3rdparty\extensions\joephgegnilhnnnocnkigpmmamgghage\policy]
"companyId"="abc"
"companyIntegrity"="xyz"
"region"="eu"
```

Attention: "region" key is used to define where your Userlane Application is hosted:

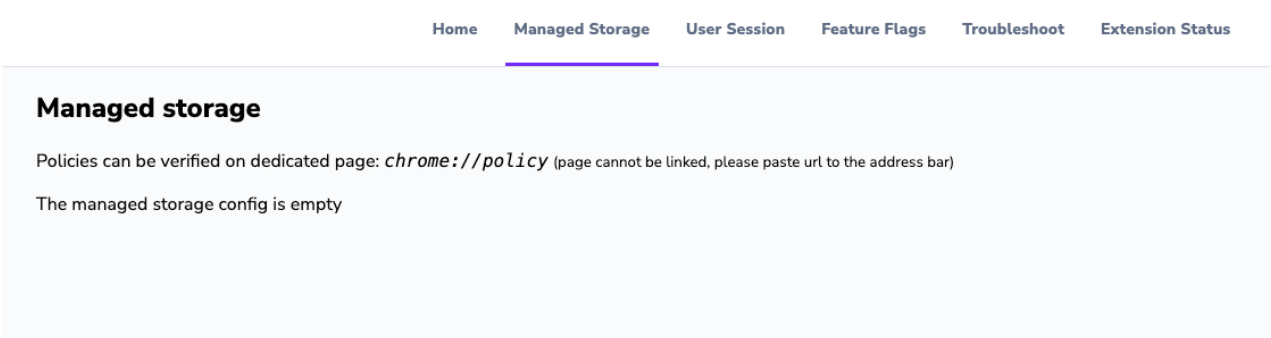
- If the Userlane Application is hosted in the EU, the corresponding value for "region" is "eu".
- If the Userlane Application is hosted in the US, the corresponding value for "region" is "us".

2. Verification

Visit the Userlane Browser Extension Settings

- Do a right click on the Browser Extension
- Choose Options
- Navigate to Managed Storage
- Confirm that all values are present

Example of the information is not set up correctly:



If you see this, please go through the installation and configuration steps again.

> ⚠ The Userlane Browser Extension will trigger automatic SSO authentication. Please make sure that all users who receive the extension are able to authenticate via the SSO. This is to avoid users seeing an inactive tab with authentication error. This behaviour may occur e.g. on private browser profiles or for users who are not part of the SSO group.

Installing and Configuring the Browser Extension for Chrome on macOS (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via a MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

This article explains the configuration for Chrome on macOS.

Browser Extensions in Chrome can be installed and configured through Enterprise Policies. Refer to the official documentation of Chrome at https://cloud.google.com/docs/chrome-enterprise/policies/ for more info.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- IT Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token in Userlane Portal

Steps to Complete the Setup

1. Installation and Configuration
2. Verification

1. Installation and Configuration

1.1 ExtensionInstallForceList browser policy

Add the Userlane Extension (ID for Chrome: oaienfpdbimabhlgjlbdpocbogaijnam)
to the ExtensionInstallForceList: https://cloud.google.com/docs/chrome-enterprise/policies/?policy=ExtensionInstallForcelist to install the Userlane Extension from the Google Chrome Store.

Example org.google.Chrome.plist file:

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">

<plist version="1.0">

<dict>

 <key>ExtensionInstallForcelist</key>

 <array>

  <string>oaienfpdbimabhlgjlbdpocbogaijnam</string>

 </array>

</dict>

</plist>
```

1.2 Browser Policy Configuration

Chrome Extensions can be configured the same way they are installed.

Example com.google.Chrome.extensions.oaienfpdbimabhlgjlbdpocbogaijnam.plist file:

```
<?xml version="1.0" encoding="UTF-8"?>

<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">

<plist version="1.0">

 <dict>

  <key>companyId</key>

  <string>abc</string>

  <key>companyIntegrity</key>

  <string>xyz</string>

  <key>region</key>

  <string>eu</string>

 </dict>
```

```
</plist>
```

Attention: "region" key is used to define where your Userlane Application is hosted:

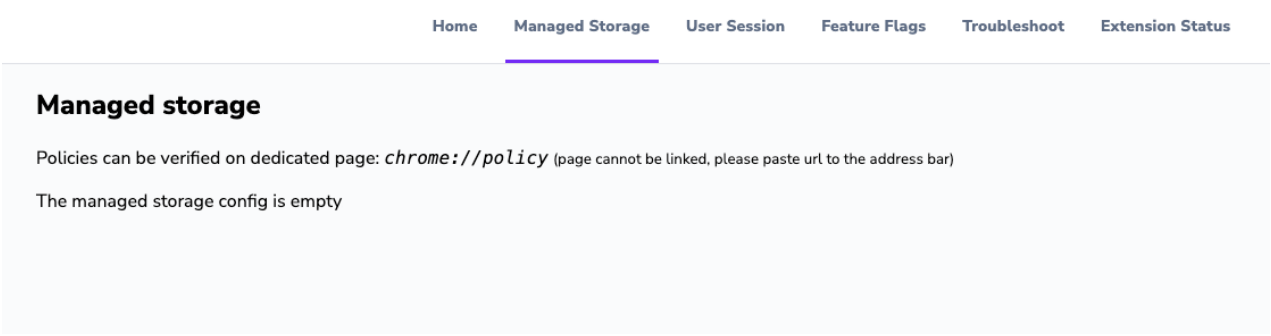
- If the Userlane Application is hosted in the EU, the corresponding value for "region" is "eu".
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Verification

Visit the Userlane Browser Extension Settings

- Do a right click on the Browser Extension
- Choose Options
- Navigate to Managed Storage
- Confirm that all values are present

Example of the information is not set up correctly:



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Installing and Configuring the Userlane Browser Extension for Firefox on Windows (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via a MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

This article explains the configuration for Firefox on Windows.

Browser Extensions in Firefox can be installed and configured through Enterprise Policies.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- IT Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token in Userlane Portal

Steps to Complete the Setup

1. Installation and Configuration
2. Verification

1 Installation and Configuration

ExtensionInstallForceList browser policy

Add the Userlane Extension (Link for Firefox: https://browser-extension.userlane.com/firefox/userlane.xpi) to the Extension\Install list:

https://github.com/mozilla/policy-templates#extensionsettings

For the *installation_mode* we recommend *force_installed.*

New registry **entry** (example)**:**

Path: HKEY_LOCAL_MACHINE\Software\Policies\Mozilla\Firefox

New entry name: ExtensionSettings

Entry type: REG_MULTI_SZ

Example **value** for the registry entry **:**

```
{
  "{9f6832a6-ec0c-11e8-8eb2-f2801f1b9fd1}": {
    "installation_mode": "force_installed",
    "install_url": "https://browser-extension.userlane.com/firefox/userlane.xpi"
  }
}
```

Note: The Registry Key might need to be modified if multiple Browser Extensions (other than Userlane) are installed to Firefox.

Browser Policy Configuration

Firefox Extensions can be configured in many ways, e.g. through system policies: https://extensionworkshop.com/documentation/enterprise/adding-policy-support-to-your-extension/

On Windows, the easiest way is to use system registry. Prepare the following data that you will find in the Portal: *Settings - Single Sign On* and *Settings - Browser Extension*

- companyId (provided by your Customer Value Manager!)
- companyIntegrity
- region

Here is the registry path to add the configuration:

Software\Policies\Mozilla\Firefox\policies\3rdparty\Extensions\{9f6832a6-ec0c-11e8-8eb2-f2801f1b9fd1}

Example .reg file:

```
Windows Registry Editor Version 5.00
```

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Mozilla\Firefox\3rdparty]


[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Mozilla\Firefox\3rdparty\Extensions]


[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Mozilla\Firefox\3rdparty\Extensions\{9f6832a6-ec0c-11e8-8eb2-f2801f1b9fd1}]

"companyId"="12345"

"companyIntegrity"="12345"

"region"="eu"

"authMethod"="openUrl"

"authToken"=""

"userId"="user123"
```

Attention: "region" key is used to define where your Userlane Application is hosted:

- If the Userlane Application is hosted in the EU, the corresponding value for "region" is "eu".
- If the Userlane Application is hosted in the US, the corresponding value for "region" is "us".

Here is additional info about the specific values shown above. The first three are **required**:

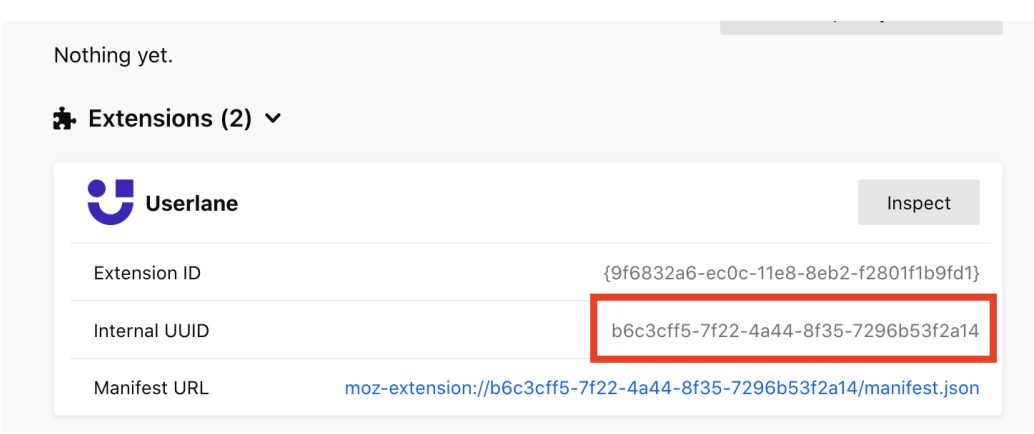
Name	Default value	Description	Required
companyId		Id of the company from Admin Center	yes
companyIntegrity		Value to prove the integrity of the companyId, you can set it in the Portal	for SSO-SAML
region	eu	Region, EU by default; need to be specified for US customers	for US
authMethod		Option to override default Auth method set in Portal	no

authToken		Authentication Token for Passwordless Authentication	only for non SAML
userId		ID of the user, depends on internal settings; e.g. email for SSO	no
userAttributes		User attributes in JSON format	no

2. Verification

Visit

moz-extension://**EXTENSION_INTERNAL_UUID**/options/index.html?stay#/nativeconfig, where **EXTENSION_INTERNAL_UUID** can be found on `about:debugging#/runtime/this-firefox` page:



for example: moz-extension://b6c3cff5-7f22-4a44-8f35-7296b53f2a14/options/index.html?stay#/nativeconfig

Please note that the Internal UUID is always unique.

Setting up Single Sign On with Azure Active Directory

Last Modified on 25.06.2026

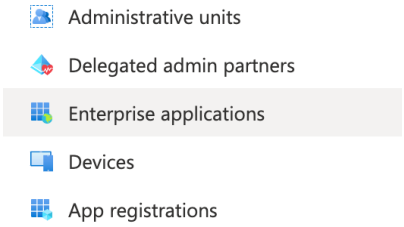
Single Sign-On is a convenient, yet secure way of authenticating a user - without them having to set up a new password.

Requirements

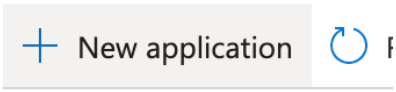
- access to Azure Portal
- access to Userlane Portal

Set up SSO for Azure Active Directory

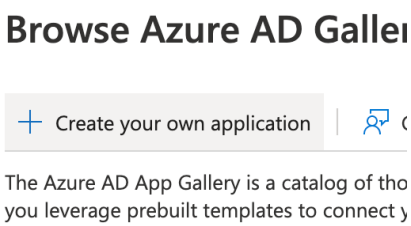
1. Open the Azure Portal and navigate to Azure Active Directory / Enterprise applications.



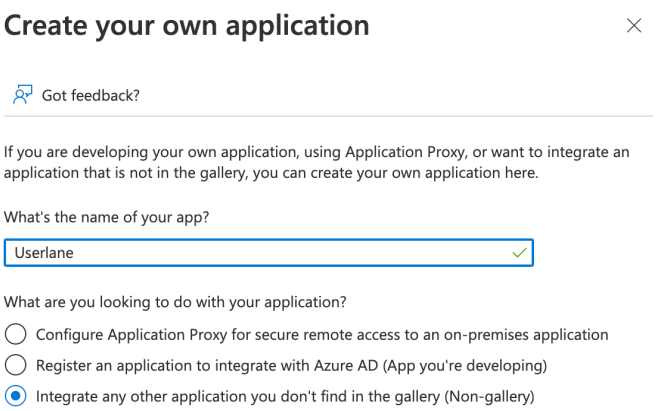
2. Click on “New application”



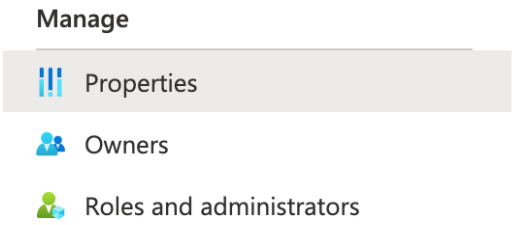
3. Click on “Create your own application”



4. Enter a name for your application. This can be whatever you like, for example “Userlane”. Confirm the creation.



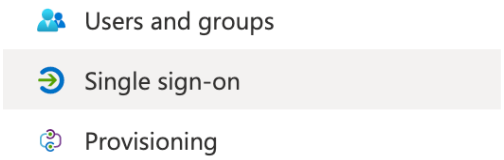
5. Open the “Properties” page from the menu on the left



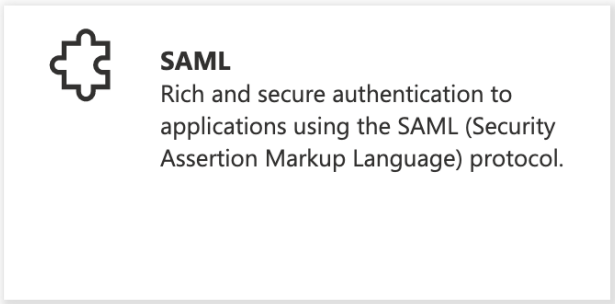
6. Set the “Assignment required” option to “No”. This allows all users to sign into Userlane if needed.



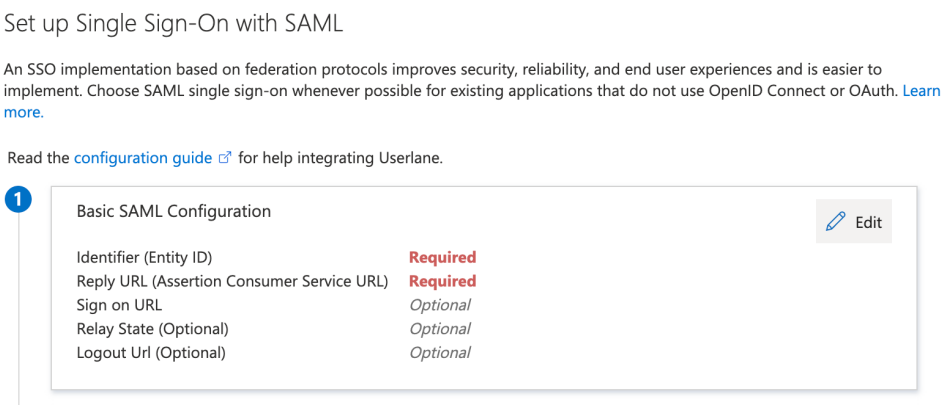
7. Open the “Single sign-on” page from the menu on the left



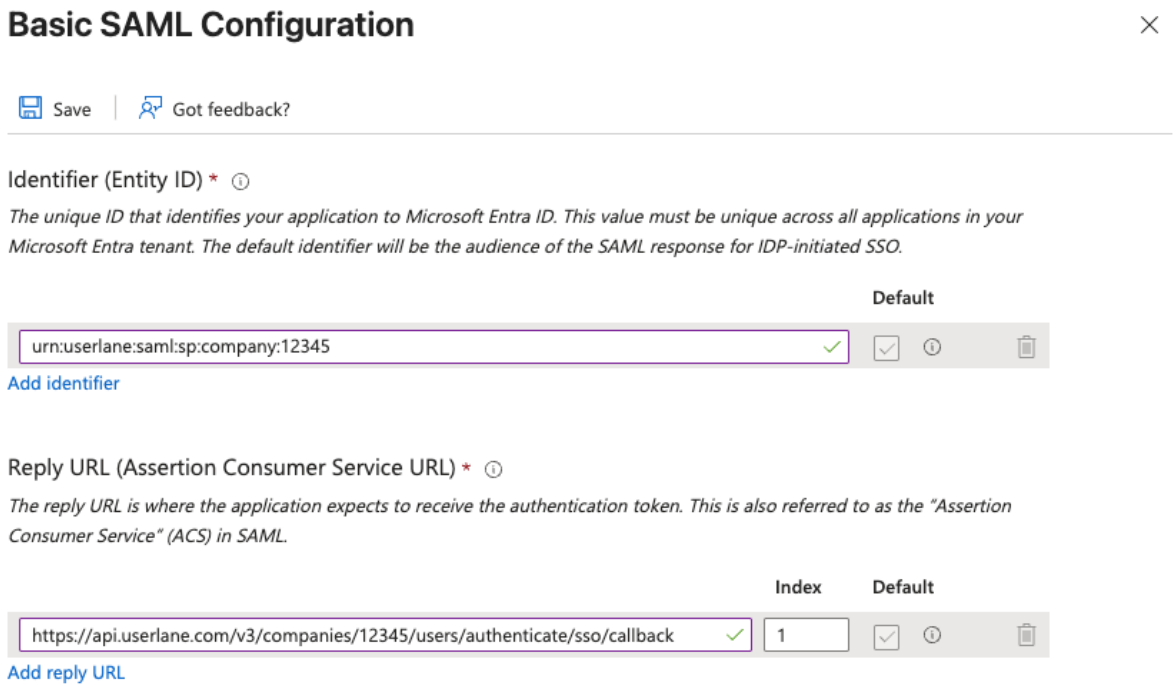
8. Select “SAML” as the single sign-on method



9. Click “Edit” on the Basic SAML Configuration fields



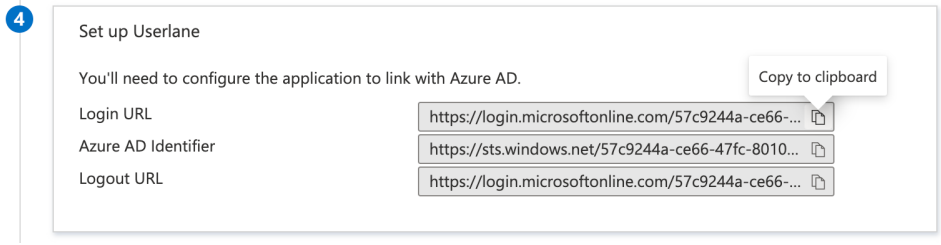
10. Now fill the Identifier and Reply URL with the value that you can find in the Userlane Portal under Account > Global settings > Single Sign-on. This typically looks like a URL starting with https://sso-saml.userlane.com/.. We tried to make this as easy as possible for you at Userlane, so this same value goes into both the Identifier and the Reply URL. Save these changes.



11. Optional step: If you want to segment users based on attributes in their profile, you can add “Attributes & Claims” in the second step of the “Set up Single Sign-On with SAML” page.
Typically we see that customers want to include attributes like country, department, or other organizational attributes to show the right training & enablement content to users.



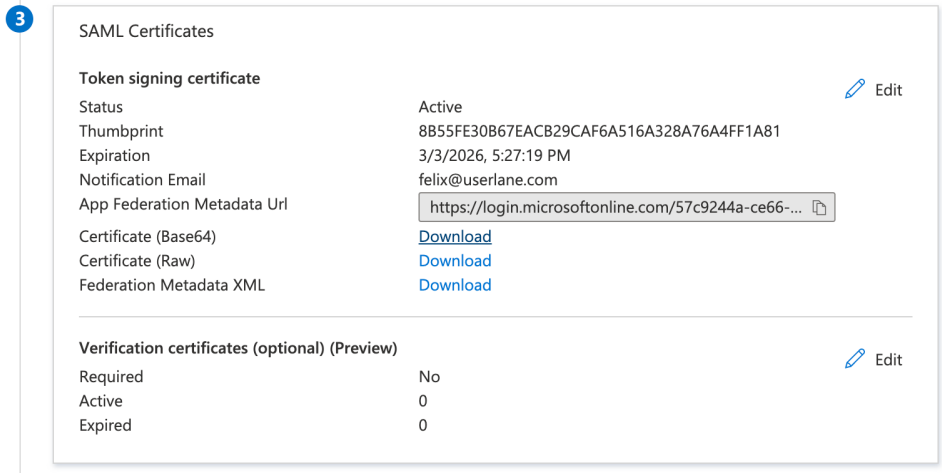
12. This completes the setup on the side of Azure Active Directory. The remaining steps are about configuring Userlane to trust your Azure Active Directory and also need to be completed to enable Single Sign On. Scroll down to Step 4 of the “Set up Single Sign-On with SAML” page, and copy the Login URL.



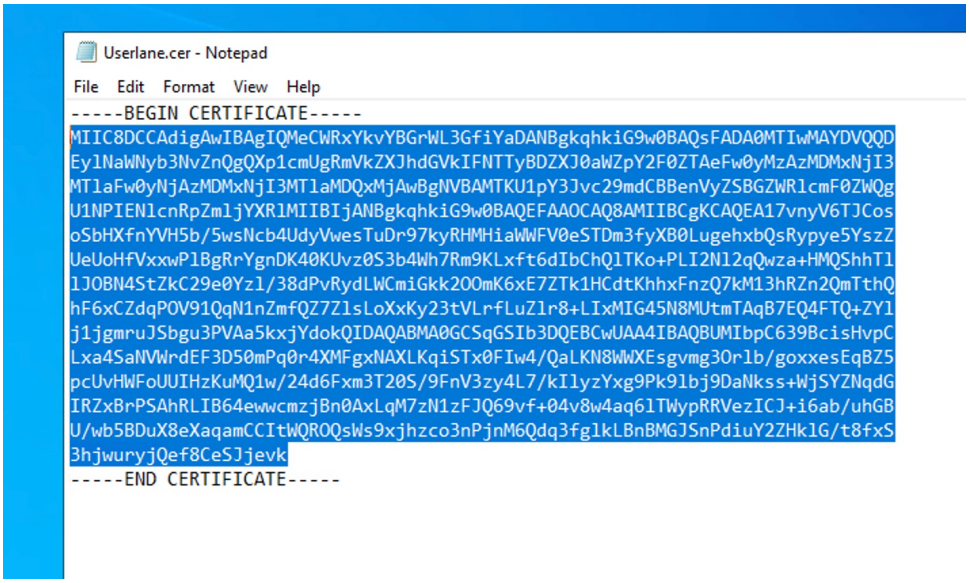
Paste this Login URL into the “IDP Entrpoint URL” field in the Userlane Portal’s SSO configuration page (Account > Global settings > Single Sign-on).



13. Back on the Azure Portal page, click on “Download” of the SAML Certificate in Base64 format in Step 3.



14. Open the downloaded .cer file in a Text Editor of your choice (e.g. Notepad by right-clicking on the file and then Open With) and copy the part inside of the -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- part to your clipboard.



2. Add information to Userlane Portal

Continue with step 3 from the article on setting up SSO for Userlane.

At a Glance

This video outlines the most relevant steps to seamlessly rollout Userlane.

Setting up Single Sign on with Google Workspace

Last Modified on 25.06.2026

Single Sign-On is a convenient, yet secure way of authenticating a user - without them having to set up a new password.

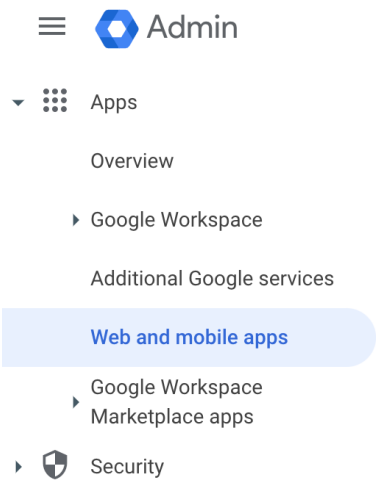
Requirements

- access to Google Admin center
- access to Userlane Portal

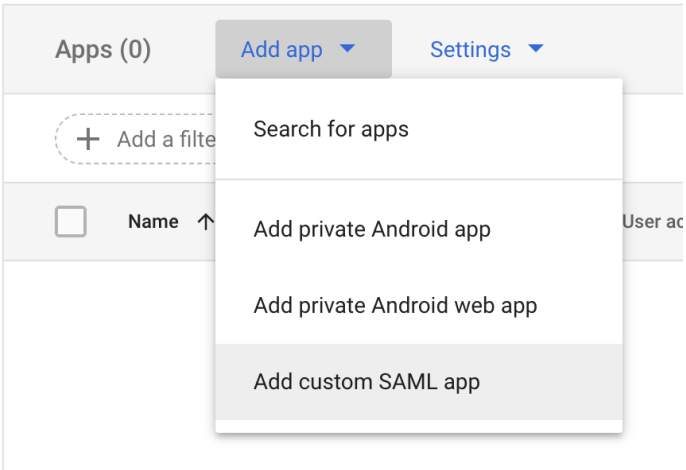
In order to configure the Single Sign-On for Userlane, follow these steps below:

1. Configuring Google Workspace

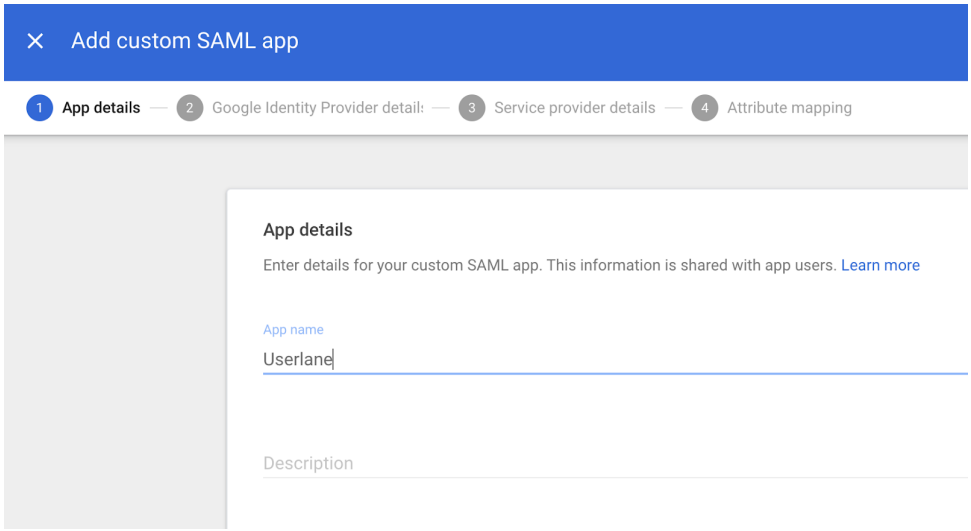
1. Open the Google Admin center (admin.google.com) and navigate to Apps / Web and mobile apps



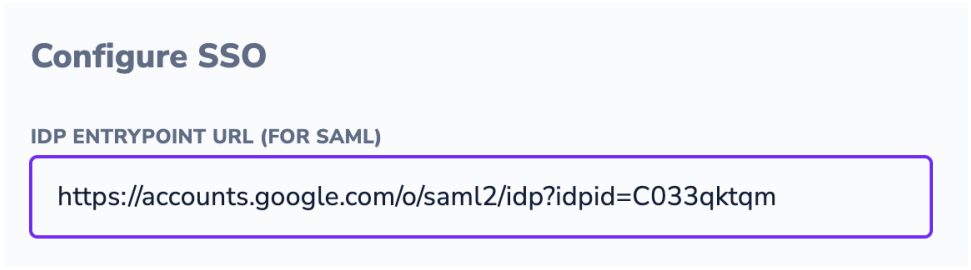
2. Click on “Add app” and select “Add custom SAML app”



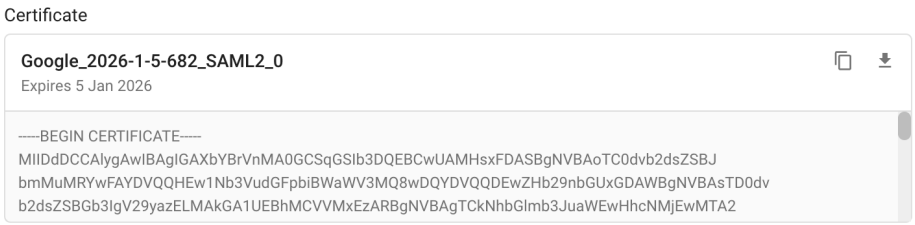
3. Enter “Userlane” as App name. Optionally add a description and App icon (these are non-essential parameters). Continue to the next screen.



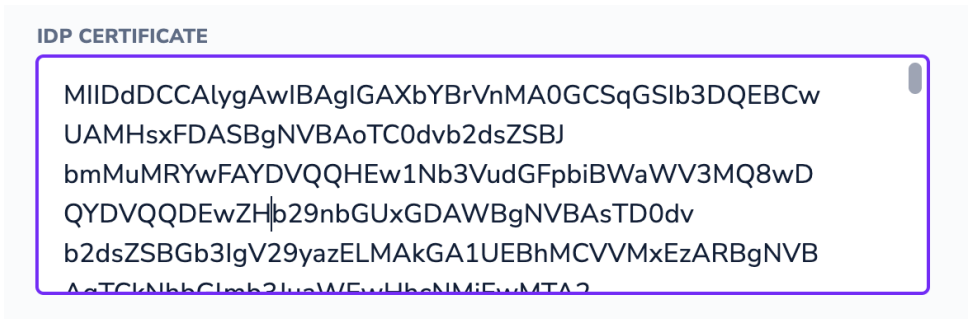
4. Copy the SSO URL from Google and paste it into the “IDP Entrypoint URL” field in the Userlane Portal’s SSO configuration page (Account > Global settings > Single Sign-on).



5. Copy the Certificate from Google and paste it into the “IDP Certificate” field on the same page in the Userlane Portal.

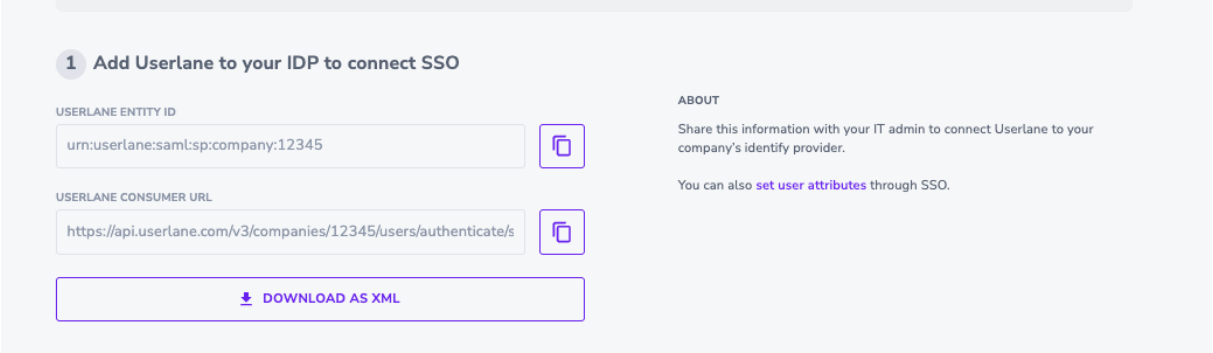


6. Then remove the “---BEGIN CERTIFICATE---” and “---END CERTIFICATE---” lines from the beginning and ending of the textbox.



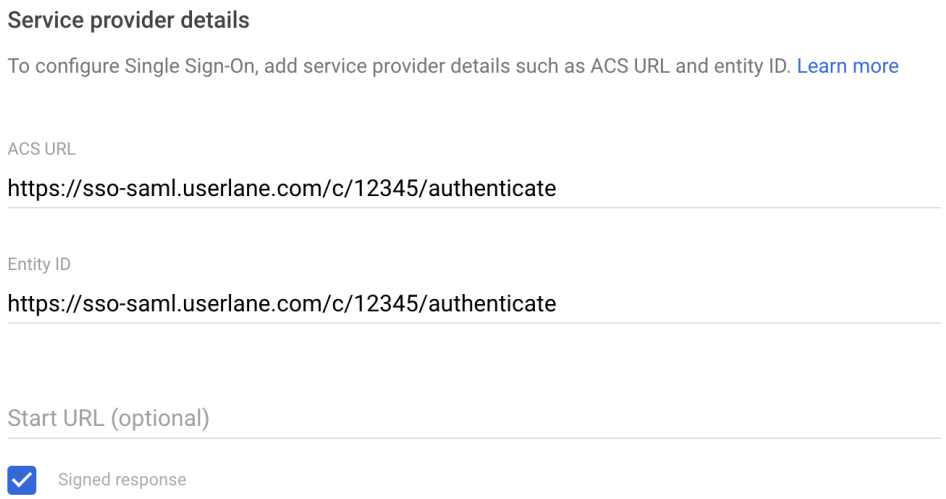
7. Confirm these edits by clicking “Save” on the Userlane Portal.

8. Copy the “Userlane Entity ID & Consumer URL” from the Userlane Portal. This typically looks like a URL starting with https://sso-saml.userlane.com/..

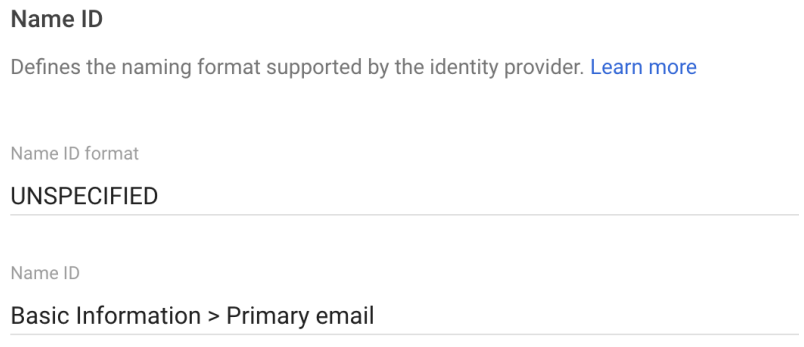


9. Back on the Google Admin page, continue to the next step.

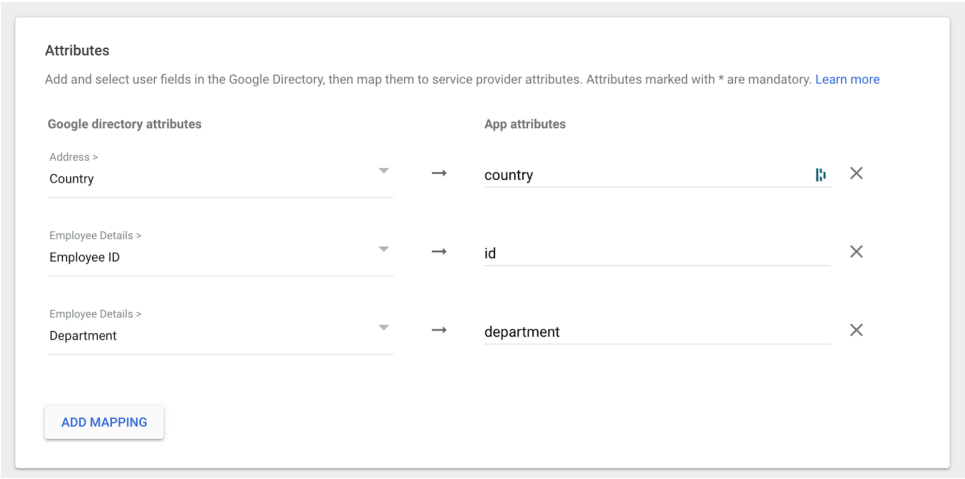
10. We tried to make this as easy as possible for you at Userlane, so the copied URL same value goes into both the “ACS URL” and “Entity ID” on the Google Admin configuration screen. Tick the “Signed response” checkmark.



11. For the Name ID confirmation, you can leave the default configuration unchanged.

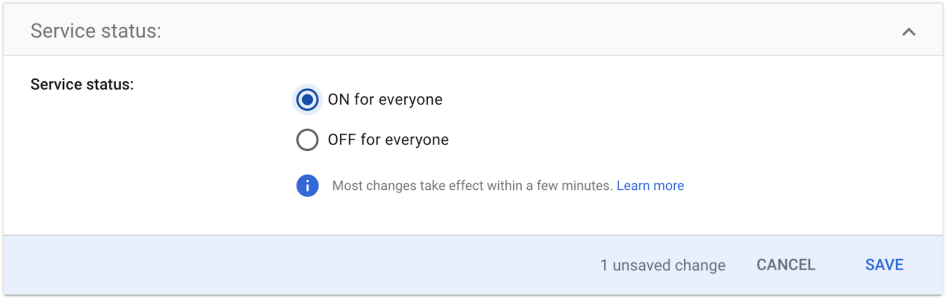


12. On the next step, you can optionally add attributes that should be handed over from Google Workspaces to Userlane for each user. This allows you to enhance the Userlane profile in Userlane, which can be used to segment users and show them targeted content. You can leave it blank or add a few relevant mappings:



13. Complete the configuration of Userlane as SAML App in Google Admin.

14. Make sure to enable access to the Userlane SAML App in Google Admin for your entire organization.



2. Add information to Userlane Portal

Continue with step 4 from the article on setting up SSO for Userlane.

Expanding SSO Settings

Last Modified on 07.08.2025

Why use it

Expanding SSO settings allows for greater control and customization of the single sign-on (SSO) experience.

By expanding SSO settings, organizations can

- add additional user attributes
- connect Userlane to further applications

This flexibility helps enhance user experience, and ensure seamless and secure access across multiple applications and systems.

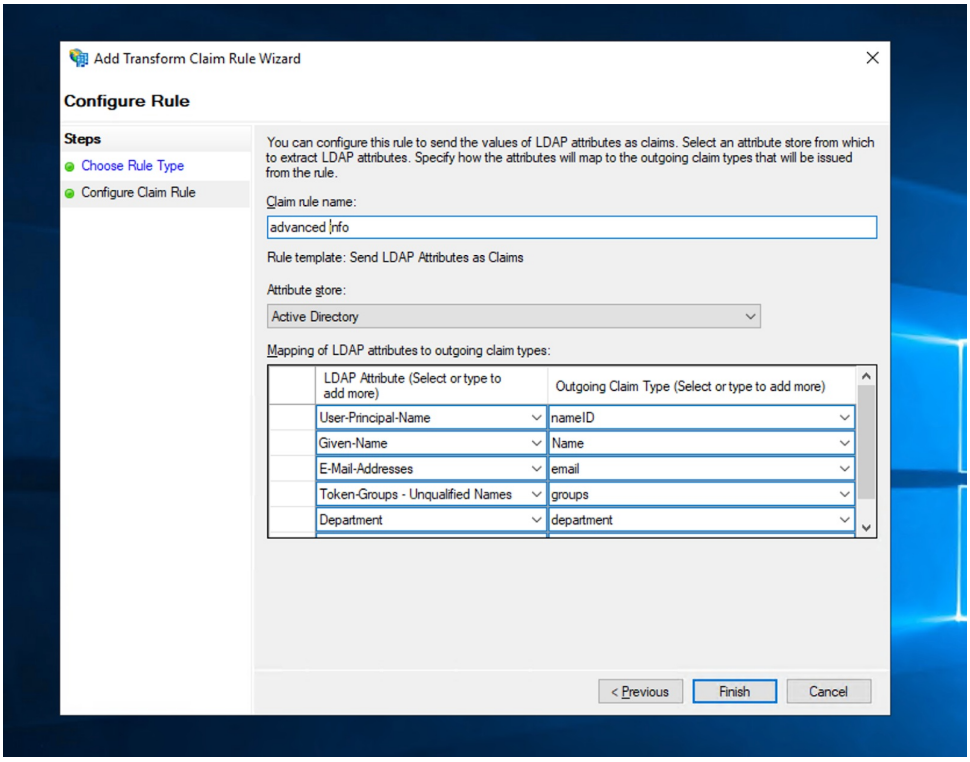
Add additional User Attributes

The App Owner often needs to feed more user data into Userlane for more sophisticated targeting or greater insights into analytics.

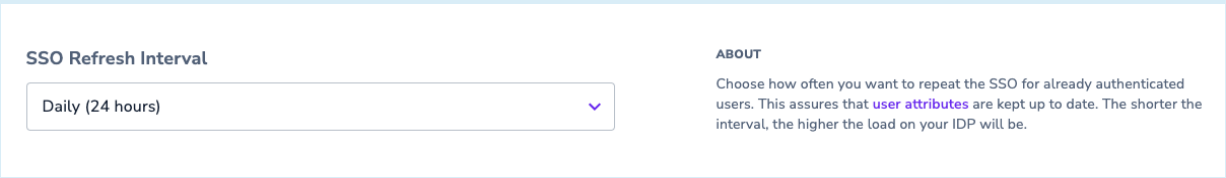
Recommended attributes to be passed on are:

- Region / Country / Language
- Role / Department

The IT Admin will have to check data availability as well as configure the additional attributes as described in step 8.2 in this article.



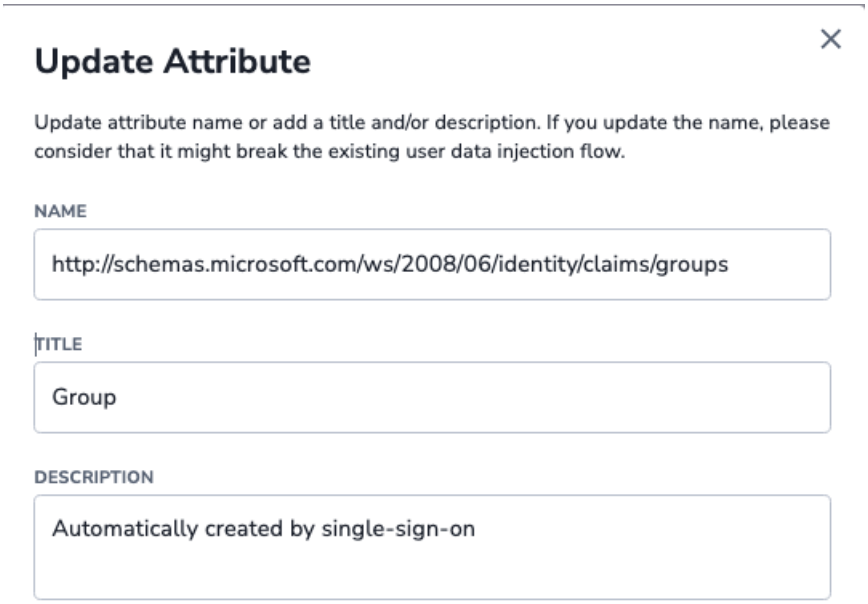
ℹ Make sure to choose how often you want to repeat the SSO for already authenticated users. This assures that user attributes are kept up to date. For doing this: sign in to Userlane **Portal > Settings > Global settings > Browser Extension** then in the dropdown SSO Refresh Interval choose one of the available options. Keep in mind that the shorter the interval, the higher the load on your IDP will be.



Adjust title of a Company Attribute in Userlane Portal

At times, SSO sends data with a long key that makes it difficult to work with when setting up User Segments. You can adjust the title of any attribute under **Userlane Portal > Settings > Company Attributes**

Click on the attribute and change the title.



Connect Userlane to further applications

After Userlane has been launched within one application, it is typically launched in more applications used within the company.
For this reason, the App Owner of the new application has to request, once again, the necessary access permissions for his target group as described in 2.1 (step 7) in this article and this config needs to be added to the existing settings.

> ℹ **Note for the IT Admin:**
> The user profile registration via SSO reflects the overall company user data and is not per-app basis. This distinction will happen later on at the application level.

Installing and Configuring the Browser Extension for Chrome on Windows (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via a MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

This article explains the configuration for Chrome on Windows.

Browser Extensions in Chrome can be installed and configured through Enterprise Policies. Refer to the official documentation of Chrome at https://cloud.google.com/docs/chrome-enterprise/policies/ for more info.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- IT Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token in Userlane Portal

Steps to Complete the Setup

1. Installation and Configuration
2. Verification

1. Installation and Configuration

1.1 ExtensionInstallForceList browser policy

Add the Userlane Extension (ID for Chrome: oaienfpdbimabhlgjlbdpocbogaijnam)
to the ExtensionInstallForceList: https://cloud.google.com/docs/chrome-enterprise/policies/?policy=ExtensionInstallForcelist to install the Userlane Extension from the Google Chrome Store.

Example registry file

```
Windows Registry Editor Version 5.00

[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Google\Chrome\ExtensionInstallForcelist]

"1"="oaienfpdbimabhlgjlbdpocbogaijnam"
```

You can also download it here.

Note: The Registry Key might need to be modified if multiple Browser Extensions (other than Userlane) are installed to Chrome.

1.2 Browser Policy Configuration

Registry keys in the

```
HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Google\Chrome\3rdparty\extensions\oaienfpdbimabhlgjlbdpocbogaijnam\policy
```

path.

All keys should have type REG_SZ.

Please note that you need to get the correct **companyID and region** from your Customer Value Manager!

Example registry file:

```
Windows Registry Editor Version 5.00
[HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Google\Chrome\3rdparty\extensions\oaienfpdbimabhlgjlbdpocbogaijnam\policy]
"companyId"="abc"
"companyIntegrity"="xyz"
"region"="eu"
```

Attention: "region" key is used to define where your Userlane Application is hosted:

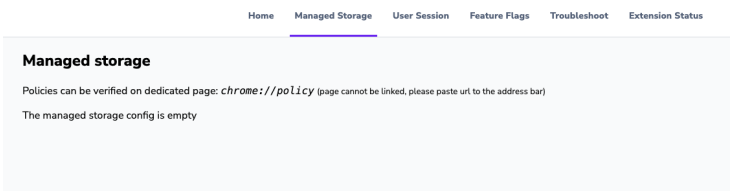
- If the Userlane Application is hosted in the EU, the corresponding value for "region" is "eu".
- If the Userlane Application is hosted in the US, the corresponding value for "region" is "us".

2. Verification

Visit the Userlane Browser Extension Settings

- Do a right click on the Browser Extension
- Choose Options
- Navigate to Managed Storage
- Confirm that all values are present

Example of the information is not set up correctly:



If you see this, please go through the installation and configuration steps again.

⚠ The Userlane Browser Extension will trigger automatic SSO authentication. Please make sure that all users who receive the extension are able to authenticate via the SSO. This is to avoid users seeing an inactive tab with authentication error. This behaviour may occur e.g. on private browser profiles or for users who are not part of the SSO group.

Installing and Configuring the Userlane Browser Extension for Firefox on macOs (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via a MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

This article explains the configuration for Firefox on macOS.

Browser Extensions in Firefox can be installed and configured through Enterprise Policies.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token

Steps to Complete the Setup

- Installation and Configuration
- Verification

1. Installation and Configuration

ExtensionInstallForceList browser policy

Add the Userlane Extension (Link for Firefox: https://browser-extension.userlane.com/firefox/userlane.xpi) to the Extension\Install list: https://github.com/mozilla/policy-templates#extensions

There are 2 ways to achieve this.

Option A: With a plist file:

Example org.mozilla.firefox.plist file:

```
<?xml version="1.0" encoding="UTF-8"?>

<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">

<plist version="1.0">

<dict>

 <key>EnterprisePoliciesEnabled</key>

 <true/>

 <key>Extensions</key>

 <dict>

  <key>Install</key>

  <array>

   <string>https://browser-extension.userlane.com/firefox/userlane.xpi</string>

  </array>

 </dict>

</dict>

</plist>
```

Option B: With a policies.json file

Place a policies.json file inside the Firefox.app container at Firefox.app/Contents/Resources/distribution/policies.json.

Example policies.json file:

```
{

 "policies": {

  "Extensions": {

   "Install": [

    "https://browser-extension.userlane.com/firefox/userlane.xpi"
```

```
    ]
   }
  }
}
```

Browser Policy Configuration

(1) Firefox Extensions are configured through Managed Storage Manifests: https://developer.mozilla.org/en-US/docs/Mozilla/Add-ons/WebExtensions/Native_manifests#Managed_storage_manifests.

Example managed storage manifest .json file::

```
{
 "name": "{9f6832a6-ec0c-11e8-8eb2-f2801f1b9fd1}",
 "description": "Config for the Userlane Extension in Firefox",
 "type": "storage",
 "data": {
  "companyId": "abc",
  "companyIntegrity": "xyz"
  "region": "eu"
 }
}
}
```

Attention: "region" key is used to define where your Userlane Application is hosted:

- If the Userlane Application is hosted in the EU, the corresponding value for "region" is "eu".
- If the Userlane Application is hosted in the US, the corresponding value for "region" is "us".

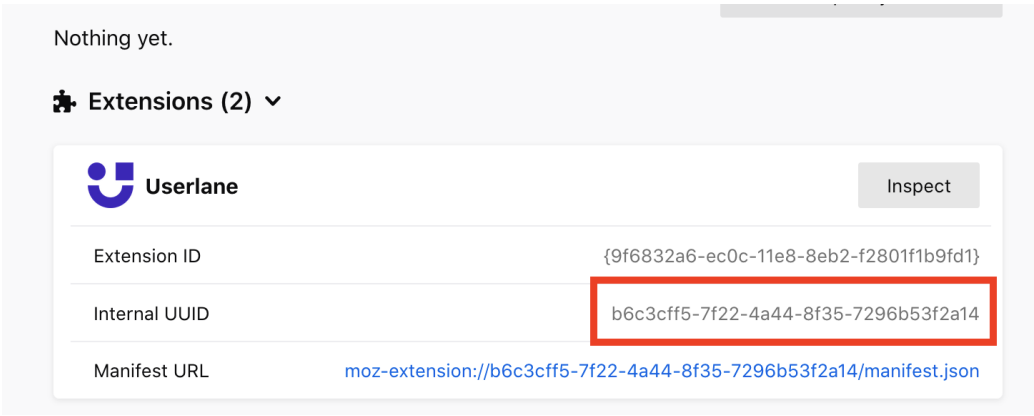
Place this .json file anywhere on the client.

(2) For Firefox to find the file, we need to add it's path to a Registry Key:https://developer.mozilla.org/en-US/docs/Mozilla/Add-ons/WebExtensions/Native_manifests#Manifest_location. The Name of the Userlane Extension for Firefox is {9f6832a6-ec0c-11e8-8eb2-f2801f1b9fd1}.

2. Verification

Visit

moz-extension://**EXTENSION_INTERNAL_UUID**/options/index.html?stay#/nativeconfig, where **EXTENSION_INTERNAL_UUID** can be found on `about:debugging#/runtime/this-firefox` page:



for example: moz-extension://b6c3cff5-7f22-4a44-8f35-7296b53f2a14/options/index.html?stay#/nativeconfig

Please note that the Internal UUID is always unique.

Central Browser Extension Rollout

Last Modified on 03.06.2025

Browsers can be configured via so-called Enterprise policies. Those policies are provided by the Browser manufacturers (Mozilla, Google, or Microsoft) and allow IT Admins to regulate what users can or can't do with the Browser. To do that, companies use a tool to manage devices and software packages (MDM) such as Microsoft InTune, Entel or Matrix42 Empirum. It is possible to automatically install specific Browser Extensions and to provide configuration parameters to them.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on region
- IT Admin with access to Browser Installation and Policies
- IT Admin creates integrityToken
- Userlane Account Admin to set Integrity Token in Userlane Portal

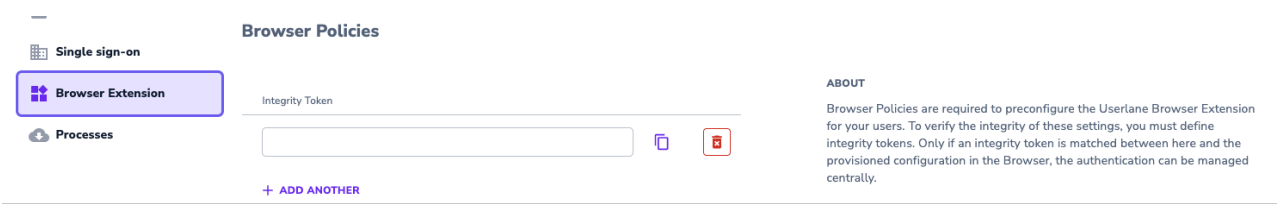
Installation and Configuration

1. Userlane Browser Extension must be added to the ExtensionInstallForceList browser policy
2. Browser Policies must be configured for the Userlane Browser Extension

You need to configure the Browser to install the Userlane Extension through the given options by the respective browser:

- Microsoft Edge on Windows
- Chrome on Windows
- Chrome on macOS
- Firefox on macOS
- Firefox on Windows

Then, sign in to **Userlane Portal > Settings > Browser extension**



Here, you can add your Integrity Token to verify the integrity of the settings and be able to manage authentication centrally. The integrity token secures the configuration for legitimate users.

Seamless Rollout Troubleshooting

Last Modified on 13.03.2026

Single Sign-On (SSO) with Browser Extension Rollout can be a powerful way to enhance security and streamline access to various applications for users.

However, like any technology implementation, it can come with its own set of challenges.

General advice

ℹ Please make sure that all the data you implement is correct and has the right syntax.

Here are some common issues that organizations may encounter when using SSO with browser extensions:

Error Messages

Below, you will find error messages that could show when trying to authenticate a user via SSO.

You can test your SSO connection by using the "Test SSO" button in your Portal - User Single Sign On section.

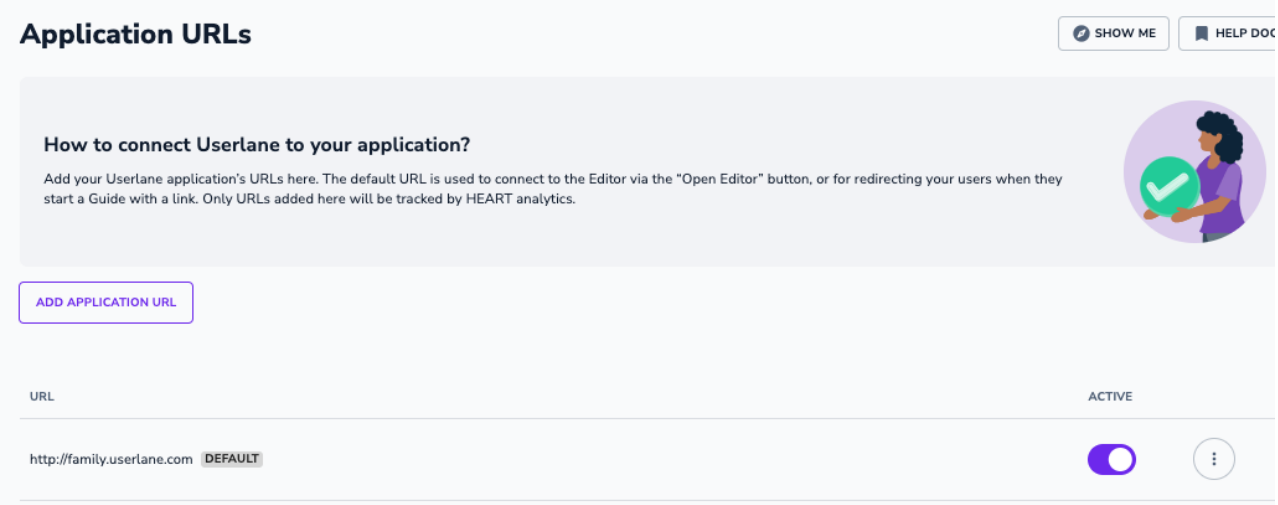
Invalid CompanyId	• Review with Userlane Customer Value Manager that correct companyID is used.
Invalid Signature	• Try renewing the certificate. This requires your IT to provide a new certificate code. • Add the new certificate to the Userlane Portal.
Error status Code 500	• Reach out to Userlane Customer Value Manager to review datatype settings.
PEM_read_bio_PUBKEY failed	• Check that the certificate in the Userlane Portal from the customer's metadata .xml is correct and not missing any characters with help of their developers.
Outdated certification	• Add a new certificate into Userlane Portal in the SSO section. Please note that you can not have two certificates simultaneously, so only enter the new one if it is already active.
Invalid certificate format	• Review certificate format. Check for blank spaces, missing content or additional content.
422	• Set up SSO trust for Userlane.

If the link opens the login page of your IDP and shows no error but you are still not authenticated (no Company User shown in the Userlane Portal), check the Entry Point URL, it usually should contain the word "SAML". Check the XML file for the right entry point URL.

Extension shows "Userlane not running"

Make sure your application is added as an underlying application

Ensure that your software is added to your Portal. Sign in to the Userlane Portal. Click the Application dropdown then select **Settings > Application URLs.**



Review setup and syntax for Browser Extension Policies

Make sure companyID, integrityToken and region are set up correctly for respective browser and use the right syntax.

How to check?

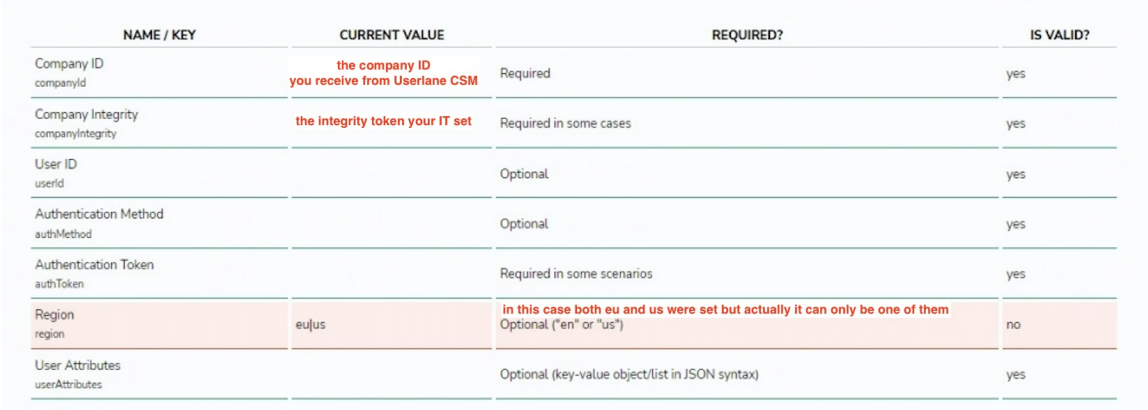
Do a right click on the Browser Extension. Click on Options.

Navigate to Managed Storage.

Here you can see what information is currently being passed on.

Review whether the data that is being passed on is correct.

If any of these values is marked in red, it means that there is an error, see example:



NAME / KEY	CURRENT VALUE	REQUIRED?	IS VALID?
Company ID companyId	the company ID you receive from Userlane CSM	Required	yes
Company Integrity companyIntegrity	the integrity token your IT set	Required in some cases	yes
User ID userId		Optional	yes
Authentication Method authMethod		Optional	yes
Authentication Token authToken		Required in some scenarios	yes
Region region	eu|us	in this case both eu and us were set but actually it can only be one of them Optional ("en" or "us")	no
User Attributes userAttributes		Optional (key-value object/list in JSON syntax)	yes

If there is no table visible, it means that the Browser was not configured yet.

You need to configure the Browser to install the Userlane Extension through the given options by the respective browser:

- Microsoft Edge on Windows
- Chrome on Windows
- Chrome on macOS
- Firefox on macOS
- Firefox on Windows

For any question regarding this, please reach out to your Userlane Customer Value Manager and IT team internally to confirm.

Content Security Policy

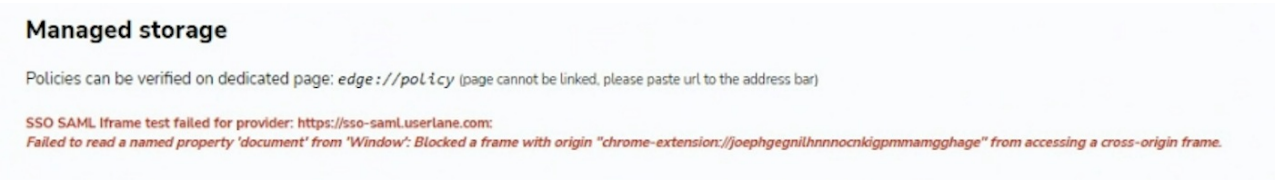
Should you have chosen Iframe as SSO Window Mode, it could be that your Content Security Policy does not support Iframes.

How to check?

Do a right click on the Browser Extension. Click on Options.

Navigate to Managed Storage.

Should that be the case, you will see a message similar to this:



In this case, please try using Inactive or Active Tab as alternative SSO Window Mode in the Userlane Portal > Browser Extension.

Review Browser Extension Policies Restrictions

If your IT has implemented restrictions on what URLs the Browser Extension is active, Userlane needs to be added to that URL list by adding *://*.userlane.com.

Review users have been added to your IDP

A user must be included in your IDP (e.g. Azure, ADFS, Google Workspace) and to any groups applicable in order to be authenticated and see Userlane content.

Users with multiple logins

The automatic authentication will only be successful if the User has just one login to the IDP.

With multiple logins, your application will first ask which to use for the authentication. Userlane would not show such prompt.

How to test: in the testing phase, please set the SSO Window mode to Active Tab in the Userlane Portal: *Settings - Browser Extension*. The authentication process will open a login page on your app.

If it lets you select which login to use, it means that Userlane will not be able to do automatic authentication with such user.

Roll out the extension only to users who are able to authenticate via SSO

If the extension is installed for a user who is not part of the AD group in your IDP, or a user who uses alternative browser profiles which would not allow an SSO authentication, then such users will get popup messages with an authentication error.

Make sure that your segmentation is set up

Make sure that the user profile you use in your application matches these segmentation settings and the user is supposed to see content.

Allow 3rd party cookies

Some browsers block 3rd party cookies by default, including the ones coming from Userlane. This will block some of the Userlane elements. You can check if this is the case by allowing all cookies in your browser settings (only for the sake of testing).

If this has solved the problem, you can put the following domains in your browser's "3rd party cookie allowed list"

- your app's domain you want to use Userlane on
- Userlane's domain [*.]userlane.com

After you added these domains, you can switch the main cookie setting back to default.

You may need to ask your colleagues in IT for help.

> ℹ For more on enabling the third-party cookies, please review the links below for your browser: Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge.
>
> If none of the links above is beneficial for you, check the guidelines in the browser's help center.

As an alternative, there are extensions that allow third-party cookies. If you would like to use this solution, Userlane's underline application URLs should be added to those extensions.

Deactivate any Adblockers and Review Antivirus settings

Some adblockers can prevent any cookies collection. Allow Userlane for your adblocker or deactivate it.

Separate window opens asking to log in again and does not close automatically

Security Software blocks content or User is not connected to company's network.

Export Browser Extension logs

The Browser Extension allows you to check and export logs for troubleshooting. Send the export to the Userlane Support Team.

Here is a short instruction video:

Your browser does not support HTML5 video.

Installing and Configuring the Browser Extension for Microsoft Edge on macOS (SSO)

Last Modified on 29.12.2025

Microsoft Edge, Mozilla Firefox, and Google Chrome allow the silent installation of Browser Extensions. This way, the users do not have to manually install the Browser Extension themselves, but rather the IT Admins can roll out the Browser Extension in the background via an MDM solution, such as Microsoft InTune, Enteo NetInstall, or Matrix42 Empirum.

Each browser needs to be set up separately.

This article explains the configuration for Edge on macOS.

Browser Extensions in Edge can be installed and configured through Enterprise Policies. Refer to the official documentation of Edge at Use group policies to manage Microsoft Edge extensions | Microsoft Learn for more info.

Requirements

- Userlane Customer Value Manager needs to provide companyID and information on the region
- IT Admin with access to Browser Installation and Policies
- Userlane Account Admin to set Integrity Token in Userlane Portal

Steps to Complete the Setup

1. Installation and Configuration
2. Verification

1. Installation and Configuration

1.1 ExtensionInstallForceList browser policy

Add the Userlane Extension (ID for Edge: joephgegnilhnnnocnkigpmmamgghage) to the ExtensionInstallForceList: Use group policies to manage Microsoft Edge extensions | Microsoft Learn to install the Userlane Extension from the Microsoft Edge Store.

Example org.Microsoft.edge.plist file:

```
<?xml version="1.0" encoding="UTF-8"?>

<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-
```

```
1.0.dtd">
<plist version="1.0">
<dict>
 <key>ExtensionInstallForcelist</key>
 <array>
  <string>joephgegnilhnnnocnkigpmmamgghage</string>
 </array>
</dict>
</plist>
```

1.2 Browser Policy Configuration

Edge Extensions can be configured the same way they are installed.

Example com.Microsoft.Edge.extensions.joephgegnilhnnnocnkigpmmamgghage.plist file:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE plist PUBLIC "-//Apple//DTD PLIST 1.0//EN" "http://www.apple.com/DTDs/PropertyList-1.0.dtd">
<plist version="1.0">
 <dict>
  <key>companyId</key>
  <string>abc</string>
  <key>companyIntegrity</key>
  <string>xyz</string>
  <key>region</key>
  <string>eu|us</string>
```

```
  </dict>

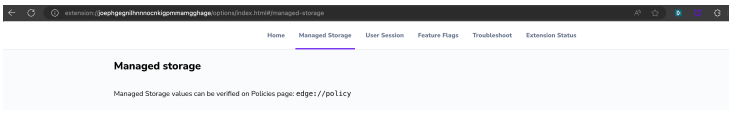
</plist>
```

2. Verification

Visit the Userlane Browser Extension Settings:

- Do a right click on the Browser Extension
- Choose Options
- Navigate to Managed Storage
- Confirm that all values are present

Example of the information is not set up correctly:



If you see this, please go through the installation and configuration steps again.

⚠ The Userlane Browser Extension will trigger automatic SSO authentication. Please make sure that all users who receive the extension are able to authenticate via the SSO. This is to avoid users seeing an inactive tab with authentication error. This behaviour may occur e.g. on private browser profiles or for users who are not part of the SSO group.

How to implement the Userlane snippet

Last Modified on 11.05.2026

About the Snippet

The Userlane snippet is the main way to load and run Userlane content inside your application. It also identifies your Users and passes key attributes to Userlane for segmentation and application usage analytics.

With Userlane snippet you can:

- Pass an **External ID** to uniquely identify a User
- Send **custom attributes** at initialisation.
- (Optional) Include an **authentication token** for added security. (***Coming soon***)

The Userlane Snippet itself is a piece of JavaScript code that your engineers need to add to your application's source code. Once added, Userlane will appear for your users. To use the snippet, you need to be able to customize JavaScript in your application.

Userlane can be added directly through the Userlane snippet in your application's code as long as the application has only one domain.

In the initial stages, you can still use the browser extension to create and test your first Guides.

Benefits of implementing the Snippet

Userlane will be shown in the application independent of the browser and is available to all end-users.

Requirements

- access to Userlane Portal
- access to source code of application

Setup Snippet for your Application

1. Admin: Share the snippet with the developers

To locate the Userlane snippet, select **Settings** and then select **Setup**. Copy the snippet and send it to your developers.

 The snippet makes Userlane visible for your end users.

If you do not want content to be visible yet, set all chapters to private or switch Userlane off under *General Settings.*

2. Developer: Implement the snippet

The load function loads Userlane in your application. The initialize command executes Userlane and is needed for the Userlane Assistant to appear. The Snippet should be implemented into the application's front-end, before the closing </body> tag.

```
// load Userlane
(function(i,s,o,g,r,a,m){i['UserlaneCommandObject']=r;i[r]=i[r]||function(){(i[r].q=i[r].q||[]).push(arguments)};a=s.createElement(o),m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)})(window,document,'script','https://cdn.userlane.com/userlane.js','Userlane');

// identify your user (see Chapter 3. below)

Userlane('identify','External_ID');


// initialize Command

Userlane('init', 'your_property_ID');
```

Make sure that the initialize command contains your account's property ID that can be found in the Userlane Portal snippet. The initialize command executes Userlane. Therefore, all the commands that you want to additionally use should be called before 'init'.

Note: Should you use Userlane on MS Dynamics, please read more detailed instructions here.

ℹ You need to load and initialize Userlane to make it visible in your application. Any other commands are optional.

3. Developer: Add additional user information in your code snippet

We recommend that you add the **External_ID** in your snippet with the identify command.

This will help you with better user segmentation, more insights in both HEART and Content Analytics and show your users the status quo about their Guide accomplishments.

```
// Pass the user ID without any Custom User Attributes

Userlane('identify','user_ID');
```

ℹ We recommend that you use the user ID in the identify command as well. Keep in mind that if this command is not used, Userlane will generate a random user ID and will save it in a cookie.

Additionally, you can add **Custom User Attributes** within this command. A custom attribute could be a user role or a subscription to a specific feature of your application. This allows applying user-based segmentation in the Userlane Portal later. This article provides more info on how a snippet with passed custom data attributes looks. Here you'll find further information on user-based segmentation.

```
// Pass a Custom User Attribute (data types: number, string, datetime, array, boolean)

Userlane('identify','user_ID',{
  Attribute_key:'Attribute_value'
});
```

ℹ If you include any extra commands in the snippet, remember to place them before the initialize command. The initialize command verifies the user information provided. So, whenever the page is refreshed, the user information is updated.

4. API Authentication token (optional)

The Userlane snippet supports optional customer-provided authentication tokens. When included, the token is passed in requests to API during initialisation, this way only authorised requests are accepted that adds an additional security layer.

Before you including token:

1. Go to **Portal** -> **Application Settings** -> **Snippet Setup**
2. **Add & save authentication token**
3. **Then copy the token and include Java Script piece in your snippet:**

```
Userlane('init', '<property-id>', { clientToken: '...' });
```

Read more about API authentication tokens

Good to know

- Every snippet is connected to a specific Userlane Account.
- We do not recommend using Snippet if you want to create Guides over multiple domains as Userlane can not pick up the context.

Secure Snippet

Last Modified on 21.04.2026

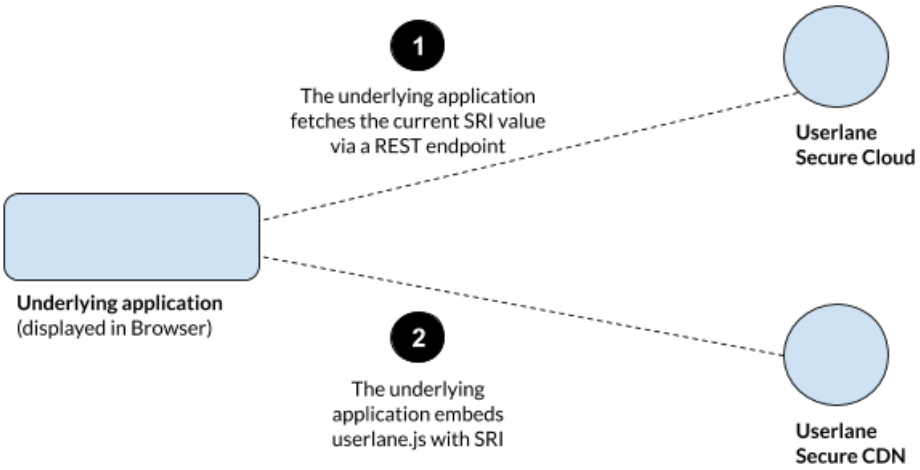
About Secure Snippet

Userlane supports SRI (Subresource Integrity) for its JavaScript Snippet.

SRI enhances security by adding a secure signature to embedded JavaScript packages in the app. It uses a unique code that the resource must match, ensuring the Userlane packages remain unaltered and protected from unauthorized changes.

Concept

In concept, this is how Userlane's Subresource Integrity works:



Step 1: Fetching the current SRI value

The underlying application must fetch the current SRI value from a REST endpoint provided by Userlane. The communication is secured via HTTPS to ensure that the SRI value is delivered without unexpected manipulation.

Example response:

```
{
  "userlane.123.js": "sha384-abcdefg..."
}
```

The response must not be cached! The SRI value for userlane.js is subject to change from one moment to another, when new updates are deployed to the customer by Userlane, as typical for a Cloud SaaS vendor.

Step 2: Embedding userlane.js with SRI

The underlying application can use the fetched SRI value to load userlane.js into the Browser.

```
<script src="https://secure.userlane.com/userlane.123.js" integrity="sha384-abcdefg..."></script>
```

Secure Snippet

The secure snippet is as easy to implement as the classic snippet. Replace the loading part of the classic Snippet with this:

```
(function (i, s, o, g, r, a, m) {
    i['UserlaneCommandObject'] = r;
    i[r] = i[r] || function () {
        (i[r].q = i[r].q || []).push(arguments);
    };
    var req = new XMLHttpRequest();
    req.open("GET", "https://api.userlane.com/integrity/artifacts/main", false);
    req.send();
    var resp = JSON.parse(req.response);
    a = s.createElement(o), m = s.getElementsByTagName(o)[0];
    a.async = 1;
    a.src = g.replace("userlane.js", resp["entryPoint"]);
    a.integrity = resp["integrity"];
    a.crossOrigin = "anonymous";
    m.parentNode.insertBefore(a, m);
})(window, document, "script", "https://secure.userlane.com/userlane.js", "Userlane");
```

After Userlane is loaded it still needs to be initialised with a command like `Userlane('init', '<put-your-propertyid-here>')` .

Browser Support

SRI is widely supported across modern browsers.

Chrome	Edge	Firefox	Safari
70+	79+	60+	12+

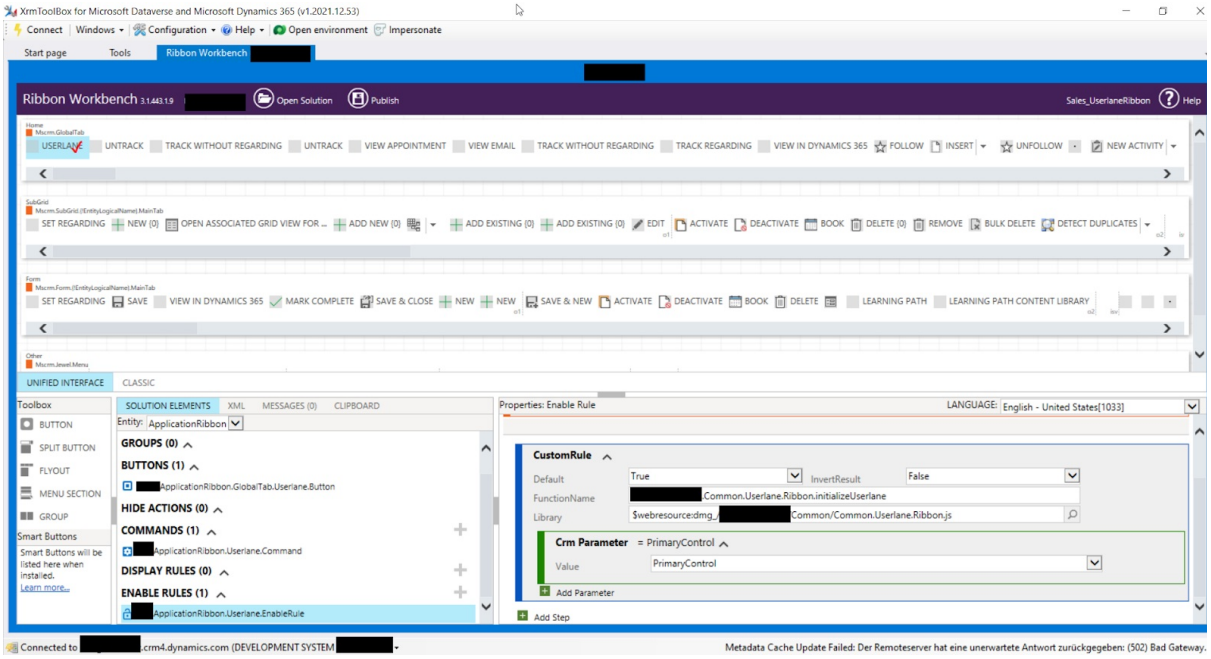
Snippet Implementation in MS Dynamics

Last Modified on 27.09.2023

This documentation will explain how you can implement the Userlane .js code snippet globally in Microsoft Dynamics CRM by implementing Userlane behind a ribbon button.

1. It is possible to implement a ribbon button via “Application Ribbons” on the global command bar named ‘Mscrm.GlobalTab.’ This command bar is available globally across Dynamics CRM.

2. Call the function with an enable rule so that a click is not required to invoke the function and start the Userlane assistant. Please see the screenshot below for an example.



3. Finally, return ‘false’ so that the ribbon button is not visible to users, but the function is still called. Please see the screenshot below for an example.

Note that window.top. Must be added before all Userlane command (eg. ‘init’, ‘identify’ in order for them to work in this configuration).



```
// define namespace
window.[redacted] = window.[redacted] || {};
[redacted] [redacted] || {};
[redacted]Common = [redacted].Common || {};
[redacted]Common.Userlane = [redacted].Common.Userlane || {};
[redacted]Common.Userlane.Ribbon = [redacted]Common.Userlane.Ribbon || (function () {

        const initializeUserlane = function (formContext) {
                // load Userlane
                (function (i, s, o, g, r, a, m) { i['UserlaneCommandObject'] = r; i[r] = i[r] || function () { (i[r].q = i[r].q ||
[]).push(arguments); }; a = s.createElement(o), m = s.getElementsByTagName(o)[0]; a.async = 1; a.src = g; m.parentNode.insertBefore(a, m); })
(window.top, window.top.document, 'script', 'https://cdn.userlane.com/userlane.js', 'Userlane');
                // TODO: the command below is just for illustration purposes
                // it's definition must be changed to work for your application
                // initialize Userlane with your Property ID
                window.top.Userlane('init', 'p3k29');
                return false;
        };

        // api
        return {
                initializeUserlane:initializeUserlane
        };
})();

//# sourceURL=Common.Userlane.Ribbon.js
```

API Authentication token

Last Modified on 01.09.2025

Overview

The Authentication Token allows you to prevent unauthorised use of the Userlane snippet by adding authentication and verification steps. When included into Userlane snippet, the token is passed to API during initialization to authenticate users from the first request and provide an additional security layer.

How it works

This token verifies a User at the moment of their **first request** to Userlane, adding an **extra layer of security**. It is in addition to - not a replacement for - the Public ID.

This piece to include into Userlane snippet:

```
Userlane('init', '<property-id>', { clientToken: '...' });
```

Key points:

- Tokens are **optional -** omit if not needed.
    - if activated then each request from assistant to API will be accompanied with token
- Token itself is generated & saved by customer (below is described how to do so in Portal), separate per each app
    - If you have multiple apps with deployed Userlane - you cans set up separate token for each
- Use short-lived tokens, rotate regularly.
- Never log or expose tokens in unsecured locations.
- If provided, the token is validated before any User data is processed.

Benefits

Heres' the key benefits the token gives to the customers.

Enhanced security:

In this era of the rapid boom of the external 3rd party AI agents that could hypothetically retrieve sensitive internal info with the requests to the API's.

Better compliance:

If you're running a business in highly regulated industries which have stricter policies and it could be very

useful for you since it adds an additional security layer

How to activate it?

In order to save and activate the authentication token you should have access to the Portal and have Admins rights

Do these steps to get therte:

1. Sign in to Portal
2. Go to **Settings -> Application Settings -> Snippet Setup**
3. **Come up with token, save it**
4. **Then run the command described above to insert saved token into snippet**
5. **Finally, turn the toggle ON**



E-Mail Invitation based Browser Extension Rollout

Last Modified on 13.11.2025

Learn how to organize the Userlane rollout, manage user access, and enhance user profiles for targeted engagement.

About User Import for Third-Party Applications

The user import feature allows you to upload a list of your users that can use Userlane via the browser extension. This not only allows you to address all your users easily but also enables user-group-specific targeting.

When to use it

There are different use cases why you should import your users:

1. Single Activation: Test Userlane with some users only
2. Complete Rollout: The first rollout for all users
3. Segmentation
4. Maintenance

For each use case, you need a CSV or Excel file with your users.

Prepare the CSV/Excel File for Import

To upload a list of users, you'll need a file in CSV or Excel format (.csv or .xlsx) with their email addresses and optional attributes. You can either ask your tech department for the file or create it yourself.

- In the file, each row represents one user.
- The first row should contain column headers for email and any custom attributes.
- The email column is the identifier and must have the header "email." Email addresses need to be entered in **all lowercase letters**.
    - If ID is your identifier, it should be used instead of email.
- The column headers must be the same as the ones you set up as attributes. The order of columns doesn't matter, and you can skip columns during the import process.
- Please remove any formatting.

Example: Table Sheet

	A	B	C
1	email	role_text	csm_truefalse
2	example@example.com	admin	false
3	example2@example.com	manager	true
4			
5			
6			

Example: Converted into a CSV file

```
email,role_text,csm_truefalse
example@example.com,admin,false
example2@example.com,manager,true
```

Single Activation: test Userlane only with some users

Roll out Userlane only for specific test users via:

1. **Self-Invitation**: Your employees can register themselves with their working email address via https://family.userlane.com/mll if the working email domain is registered in Userlane (ask your Customer Value Manager if you are not sure). Then they'll receive a confirmation email with their Userlane access.

2. **Uploading**: You can create a short test user list to send the email invite directly to those test users only. You can upload new Users by selecting *Settings > Company Users - Add Users*

Rollout Userlane to all users

If you plan to roll Userlane out for the first time to all your users, you can import a complete user list and trigger the invitation mail to all users at once. You can upload new Users by selecting *Settings > Company Users - Add Users*

In the uploading process, you have the choice to:

- **Invite all your users automatically:** After this process, all your imported users will receive an invitation email to activate their accounts.

- **Finish the user upload without the invitation for now:**In this case, you can send the email invites to all users later under *Settings > Company Users - Send Invite.*

After adding the users you'll see all the uploaded users with their status in the *User* overview.

Segmentation: Target your users with specific content

You can use custom user attributes to define user segments that should see specific content (e.g. a chapter that is only useful for admins). To do this:

1. Create a segmentation concept: to have a clear plan of who should see which tours and how you'll

differentiate between users.

2. **Create the attributes** you decided to use from the Portal under Account > Global Settings: you can also do this during the import process.
3. Create your user **CSV/Excel file** with the respective attributes.
4. Follow the **import process** and match the attributes in the Portal with those in your list. You can create now the attributes that are still not in your Portal.
5. **Create your user segments**: using the attributes you create you can now create your user segments (aka. user groups).
6. **Apply your user segments**: once this is done, only the users within those segments will have access to the Guides/chapters you applied the segmentation.

Good to know

- The users you import will be called Company Users.
- You can use any attributes of these users to group them in the Segment section. Find out more about how to show different chapters/Guides for other user groups.
- After importing and inviting your users, you will see your new Users only in the Settings > Company Users section, but not in the Segment - Users section. The User overview in the Segment section only shows users that opened the application after they activated Userlane. Once a user activates the browser extension via the invitation email and accesses one of your applications, they will also appear in the Segment section.

Maintenance

1. Understand Status

After uploading a user list you'll see the status of each user under *Settings > Company Users*.

- **Imported:** the user is already uploaded but isn't invited yet.
- **Pending:** the user already received the invitation mail, but didn't confirm yet.
- **Active:** the user already completed the Userlane browser extension activation via email within at least one browser and can now use Userlane in the software.
- **Created:** the user was created via SSO and becomes active once going to the application and seeing Userlane.

2. Change Status

If you want to change this status, you can

- **(re-) invite individual users** by clicking on the options (three little dots) next to the user and choosing "Activate".

- **Invite all imported users** at once by clicking on *Send Invite* and choosing to *Send to imported users.*
- **Re-invite all your pending users** at once by clicking on *Send Invite*, and choosing to *Resend to pending users*. This action will only address pending users who have not been sent an email invite within 48 hours.
- **Terminate access for individual users** by clicking at the options (three little dots) next to the user and choosing *Delete*. This will prevent them from seeing Userlane.

3. Change Attributes for users

- Create your user CSV/Excel file with the respective attributes and upload it under *Settings > Company Users*
    - This file is the same style as the one used for the initial invitation as described in How it works but with the updated list of users and/or attributes

4. Inviting new Users later on

- Regularly promote magic link https://family.userlane.com/mll to allow for self-invitation
- Manually re-invite users via uploading of users under *Settings > Company Users*

Good to know

What happens when a user has a new device?

- If a browser profile has been saved and is activated again, Userlane is still available. No further action needed.
- If a browser profile was not saved, Userlane is not available anymore.

Userlane SharePoint Extension

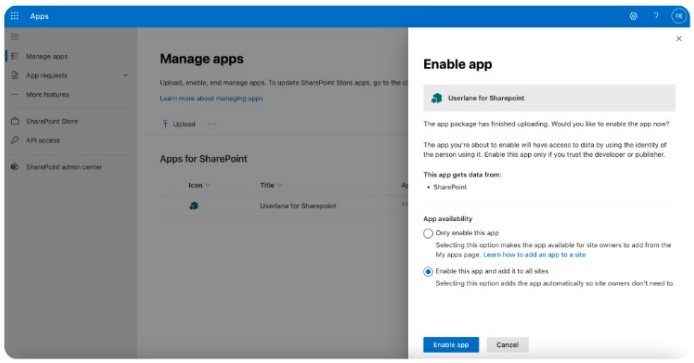
Last Modified on 16.04.2024

About Userlane Sharepoint Extension

To extent the SharePoint user experience, you can implement Userlane. With this your Users can access Userlane content.

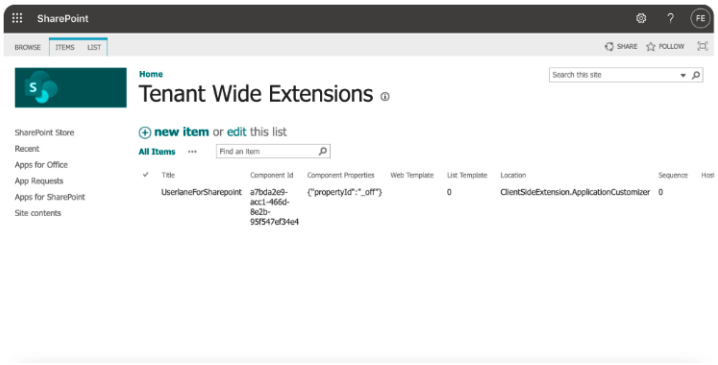
Install the Extension from an .spkgg file

1. Open the SharePoint Admin Center, navigate to More features and open the Apps page.
2. Click on Upload and select the spkgg file provided by Userlane.
   You can download this file from here: app-sharepoint-extension-1.1.0.sppkg
3. Confirm that the App should be enabled and added to all sites.



Configure the Extension

4. Continue to the Tenant Wide Extension settings. This is the place where SharePoint accepts configuration properties for each of the extensions.



SharePoint simply offers to edit the configuration in JSON format in a small input box, so it's useful to edit and validate the JSON configuration in another editor before pasting it into SharePoint.

The following options are available:

parameter	required	description
propertyId	yes	The Property ID that should be used to initialize the Snippet. Can be found in Portal. Only if a propertyId other than _off is provided, Userlane will be loaded.
userIdSource	no (defaults to userprincipalname)	Which of the many User IDs that SharePoint offers should be used for the identify call in the Snippet? Options available: • none: Don't call the identify command at all. This will lead to Userlane using a randomid in a cookie to identify a user. • id: Use the Id field of the current SharePoint User. This was observed to be a numeric id counting up from 1. • nameid: Use the UserId.NameId field of the current SharePoint User. This was observed to be an alphanumeric string. • email: Use the Email field of the current SharePoint User. userprincipalname: Use the UserPrincipalName field of the current SharePoint User. This was observed to be the email of the user and is the recommended option.
region	no (defaults to empty for EU)	Which data residency region to use when loading Userlane. This can be us or empty. Don't explicitly put in eu as this will not load. To maximize flexibility, the region is not validated.

5. As an example, a JSON configuration might look like this:

```
{"propertyId":"123_replace_me","userIdSource":"userprincipalname"}
```

6. After the configuration has been saved, Userlane will automatically be loaded onto all SharePoint pages (see which ones below).
   Note that in case of any issues, it's also possible to disable the Extension immediately here.

Where will Userlane be visible?

When enabled and added to all sites during installation, Userlane will be loaded on all these SharePoint pages:

- All sites
- All site settings pages

Userlane will never be loaded onto any of these pages:

- SharePoint Admin Center

- SharePoint Tenant-Wide Settings

Please consider that due to SharePoints caching mechanisms, sometimes the page needs to be refreshed in order for updated settings to become available. If Userlane does not appear where it should, please try refreshing the page.

Troubleshooting

1. Permissions: In order to install and configure the App, you need to be not just a SharePoint Admin, but also a Global Admin in order to be able to configure a Tenant-Wide Extension.

2. Caching: SharePoint has a built-in caching mechanism, which leads to any configuration (such as installation, configuration, or removal) of the Userlane for SharePoint App might take up to ~30mins to propagate to all clients and sites.

How to set up Userlane for self-hosting

Last Modified on 11.05.2026

About Self-Hosting

This article describes how to implement Userlane for the self-hosting version which allows you to

- download and self-host the Userlane executable file and all content
- run Userlane completely independent from an internet connection or from behind strict firewalls.

This requires involvement from both someone with access to your Userlane Portal and a developer.

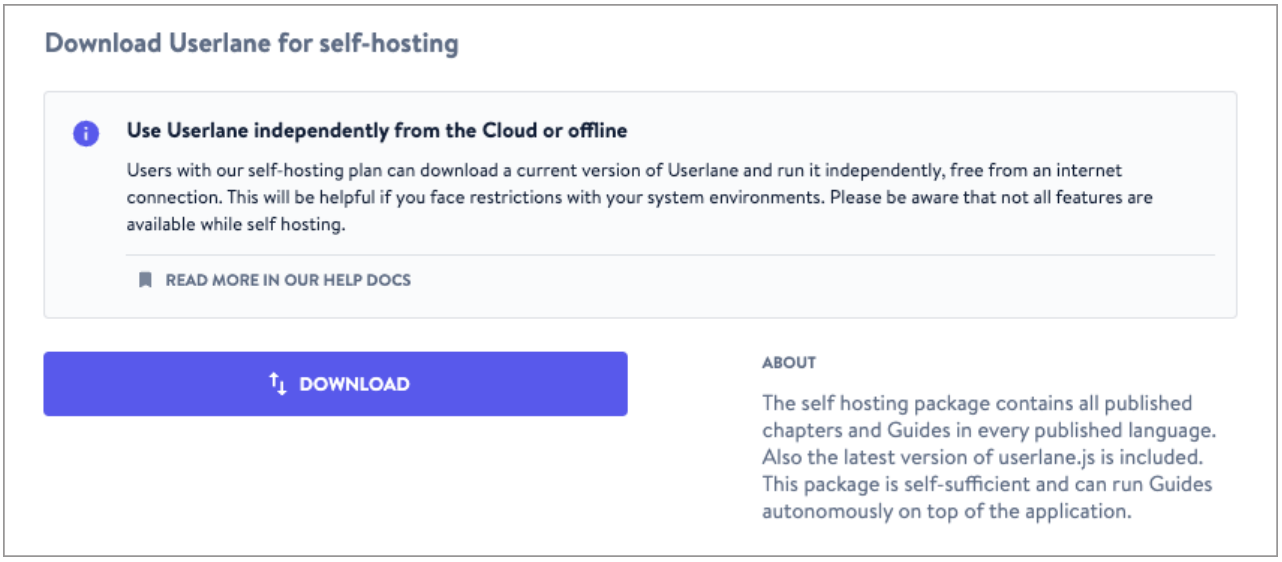
Please follow the steps to set it up:

- As a Userlane Manager
- As a Developer
- Further Considerations

As a Userlane Manager

Download the Self-Hosting-Package zip file and send it to your developers

1. Download the Self-Hosting Package and share it with your developers. Ensure your Guides are ready. Sign in to the Userlane Portal, go to Settings > Snippet Setup, and click Download.
2. The package size is under 10MB, facilitating quick download and easy forwarding via email to your developers.



As a Developer

1. Unzip and save the zip file

The downloaded zip file contains only .css, .js, .json, .txt and .html files. How exactly the content looks like in detail depends on you and your environment.

Copy the unzipped contents to a location where they are accessible through getting requests. A typical location is the *assets* folder of the application itself.

2. Test that the files are accessible

Open the userlane.html that was included in the zip in your browser using an HTTP or HTTPS protocol (Note: do not use the “file” protocol that your browser might support). You should see a small page that also contains the snippet for the next step.

3. Get your snippet

If the snippet worked fine in the previous step, use the snippet that is provided by userlane.html. Otherwise, you can manually generate a snippet:

- Copy the part of the URL from the beginning until before “userlane.html”.
- In the example snippet below you see two URL-parts. **Paste the copied URL into those two parts for the placeholder text 'example.com'**:
- For both of those URL-parts and for the init command in the example code below, **replace the example property id “31204” with your individual property id** (five signs). You find your individual property id in the name of the zip file (e.g. “userlane-app-31204”).

```
<script>

(function(i,s,o,g,r,a,m){i['UserlaneCommandObject']=r;i[r]=i[r]||function(){ (i[r].q=i[r].q||
[]).push(arguments)};a=s.createElement(o), m=s.getElementsByTagName(o)
[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m) })(window,document,'script','https://example.com/userlane/31
204/userlane.js','Userlane');

Userlane('init', 31204, {
  enableHybrid: true,
  hybridBaseUrl: 'https://example.com/userlane/31204/'
});

</script>
```

4. Implement the snippet

Implement the snippet before the '</body>' tag in the HTML template to execute it on every page reload. Test if userlane.js loads correctly and no XHR requests fail. Access the Userlane Assistant in your application.

Further Considerations

- This service is available only for Hybrid Hosting plan customers.
- Self-hosting lacks some analytics and process-tracking features due to the absence of connection to the

Userlane cloud.

- Starting a Userlane via a link differs in Userlane Self-Hosting.
- Whenever you make changes to your property in the Portal or Editor, re-download and implement the ZIP file in your self-hosting setup.
- Refer to the provided link for a detailed description of Self-Hosting limitations.

For more information please reach out to your Customer Value Manager.

Capability comparison / limitations for Self-Hosting Mode

Last Modified on 21.04.2026

This text provides an overview of the features and capabilities available in Self-Hosting mode compared to Userlane hosted.

It covers various functionalities such as analytics, tooltips, interactive guides, data validation, user segmentation, progress tracking, and integration with external knowledge bases.

Capabilities	Self-hosted	Hosted
HEART Analytics The ability to gain insight into the usage of an application, identify issues, increase user satisfaction, and ultimately improve the ROI.	✗	✓
Content Analytics The ability to measure and understand the performance of your Userlane content.	✗	✓
App Discovery The ability to reveal the applications your employees actually use.	✗	✓
Portfolio Overview The ability to identify cost optimization opportunities and mitigate security risks associated with unauthorised application usage.	✗	✓
Tags The ability to measure the usage of the specific elements/features within the external application.	✗	✓
Tooltips (Hints and Beacons) The ability to explain and highlight individual elements within an application.	✗	✓
Validators The ability to create custom validation rules for form fields within your target applications.	✗	✓
Interactive Guides Step by step guidance through a process or workflow in an underlying app.	✓	✓
Data Validation Help Managers validate users' input.	✓	✓
Automation Automate process to navigate users quicker.	✓	✓

Capabilities	Self-hosted	Hosted
PDF Export Take screenshots of every step of a Guide.	✗	✓
Auto translation Translate your text in other set up languages.	✗	✓
Messages Push notification to users announced within the external application, including Welcome Slide, Announcements, NPS Survey.	✗	✓
Userlane Assistant A support menu that overlays the underlying app and provides access to the Userlane features.	✓	✓
Help menu in the Assistant A tab menu within the Assistant where managers can connect external help documentation or external support assistance (e.g., link to ticket form)	✓	✓
Page Segmentation Functionality that allows content to be targeted to a specific page in an application.	✓	✓
Guide links to share on request The ability to provide a URL that links directly to starting a Guide within the application.	✓	✓
Userlane JS API The ability to export data.	✓	✓
Basic User Segmentation The ability to target specific content to groups of users. Basic capability uses tags to define user segments.	✓	✓
Advanced User Segmentation The ability to target specific content to groups of users. Advanced capability uses user attributes to define user segments, which can be imported into Userlane or automatically added via SSO.	✗	✓
Visual progress tracking for the individual users Showing end-users completion status of individual Guides and Chapters	✗	✓
Guide promotion The ability to provide users with a push notification in the Userlane Assistant to complete a specific Guide.	✗	✓

Capabilities	Self-hosted	Hosted
Search in the Assistant The ability to search for content in the Userlane Assistant (Guides, Announcements, Knowledge Base articles)		
Knowledge base integration The ability to connect Userlane with external knowledge bases and present the content in the Userlane Assistant.		

Create Userlane Content with AI

Last Modified on 09.02.2026

Overview

The Content Agent helps you create Guide text faster with the power of AI. It's part of Userlane's mission to make digital adoption simple, fast, and scalable.

With the Content Agent, you can:

- Generate Guide text automatically in your preferred language
- Reduce time and effort spent on manual writing
- Scale globally when combined with Auto-Translate
- Deliver consistent, high-quality content across your organization

Already have Guide text that needs improvement? Check out Refine Content with AI to learn how to make existing text more concise, clear, friendly, or professional.

Prerequisites

Before using the Content Agent, ensure you have:

- Editor access in the Userlane Portal
- Familiarity with the Recording Mode in the Editor
- A clear understanding of the Guide's purpose and target audience

Why We Built the Content Agent

Creating high-quality, localized content can be time-consuming. The Content Agent makes this easier by:

- Drafting text automatically in your organization's language
- Helping you scale Guides across multiple languages
- Reducing the cost and effort of content creation
- Enabling faster time-to-value and adoption ROI

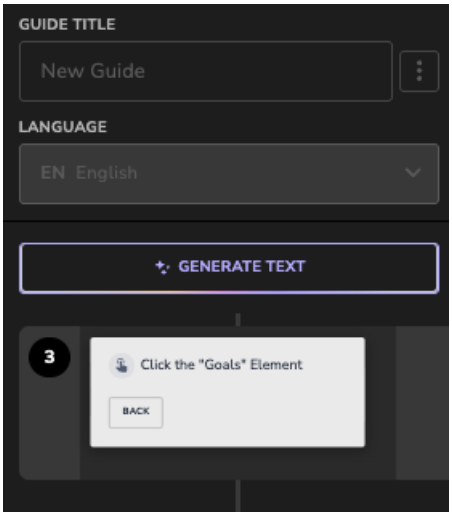
How to Generate Guide Text

1. Record your Guide

In the Editor, start Recording Mode. As you navigate your application, click on the UI elements you want to include --> each click records a step in your Guide. Continue until you've captured all the necessary steps.

2. Stop recording and generate content

After recording all your steps, stop Recording Mode. Click the **Generate text** button in the Editor toolbar. A generation window will appear in the middle of the screen.



3. Add context

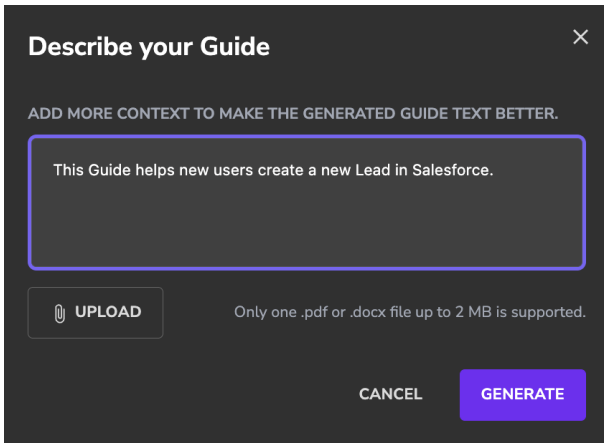
Enter a short description to help the Content Agent understand what your Guide is about. The more specific context you provide, the better your draft will be.

Good context examples:

- "This Guide helps users create a new lead in Salesforce and shows them where to click and which important fields to fill out."
- "This Guide walks new employees through their first expense report submission, including receipt upload and manager approval."
- "This Guide shows customer service reps how to escalate a support ticket to Tier 2 when specific conditions are met."

Poor context examples:

- "Help users" (too vague)
- "Salesforce guide" (lacks detail about the specific task)
- "How to use the system" (no specific objective)



Optional: Upload supporting documentation

You can also upload a .pdf or .docx file to provide the Content Agent with additional context. This is particularly useful when:

- You have detailed process documentation

- Technical terminology needs to be precise
- Your organization has specific style guidelines

Supported file types: PDF (.pdf), Word (.docx)

4. Click 'Generate'

The Content Agent will draft text for each step in your Guide based on your context and the recorded elements.

5. Review and edit the generated text

The Content Agent drafts text for each step in your Guide. Review the text carefully and consider:

- Does the tone match your organization's communication style?
- Is technical terminology accurate and consistent?
- Are the instructions clear for your target audience?
- Does each step guide users effectively to the next action?

Make any edits as needed. When you're satisfied, save your changes --> your Guide text is ready to publish.

Tips for Best Results

Be specific in your context description

Include the task goal, target users, and any important details about required fields or critical steps. The more context you provide, the more accurate and relevant your generated text will be.

Use file uploads for complex processes

If your Guide involves technical procedures or specific terminology, upload reference documentation to improve accuracy. This helps the Content Agent understand your organization's language and standards.

Choose the right level of detail

Consider your users' experience level. New users need more guidance and explanation; experienced users prefer concise, direct instructions.

Review for accuracy

Always verify that generated content matches your application's actual UI and workflow, especially after application updates. The Content Agent generates text based on the context you provide and the elements you recorded, but human review ensures accuracy.

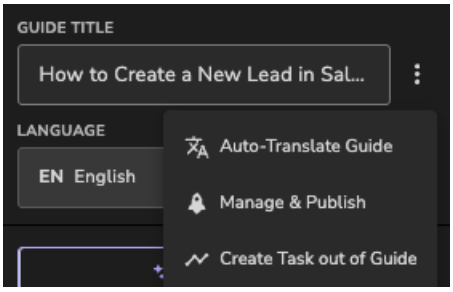
Go Global with Auto-Translate

Combine the Content Agent with Auto-Translate to scale your content across multiple languages in just a few clicks.

To auto-translate your Guide text:

1. Click the three-dot menu next to your Guide title.

2. Select Auto-translate.
3. Choose the languages you'd like Userlane AI to translate your content into.



Userlane automatically generates localized versions of your Guide text, so you can deliver consistent experiences to users around the world, instantly.

Troubleshooting

The generated text doesn't match my application's terminology

- Upload a reference document with your organization's terminology
- Provide more specific context about technical terms in the context description
- Manually edit the generated text to match your style guide
- Consider using the Refine Content with AI feature to adjust tone and clarity

The generated text is too long/short

- Adjust your context description to specify the desired level of detail
- Mention your target audience's experience level in the context
- Use the Refine Content with AI feature to make text more concise after generation

Need more help?

Contact our support team through the Contact Us page.

Refine Content with AI

Last Modified on 23.03.2026

Overview

The Content Agent can improve text you've already written or imported from other sources. Use AI-powered refinement to quickly make your content more concise, clear, friendly, or professional.

The refine feature is available for:

- **Guides** - Improve step instructions and descriptions
- **Messages** - Refine text for Announcements and Surveys
- **Tooltips** - Polish text for Hints and Beacons
- **Validators** - Enhance error messages and validation instructions

Need to create Guide text from scratch? See Generate Guide Content with AI to automatically draft text for newly recorded Guides.

Prerequisites

Before using the Refine feature, ensure you have:

- Editor access in the Userlane Portal
- Existing content that you want to improve

Why Use the Refine Feature

The Content Agent's refine options help you:

- **Save time** - Improve content in seconds instead of manually rewriting
- **Maintain consistency** - Apply the same tone and style across all your content
- **Adapt external content** - Transform verbose documentation into concise in-app guidance
- **Ensure quality** - Automatically correct spelling and grammar while refining

---

When to Use Refine Options

The refine feature is ideal for two common scenarios across your Guides, Tooltips, and Validators:

1. Polish existing content

Quickly improve text you've already written to make it more concise, clearer, or better suited to your audience's needs, whether it's a multi-step Guide, a quick Tooltip, or a Validator message.

Examples:

- A Guide step that's too wordy and needs to be more scannable
- A Message that you want to sound more professional.
- A Tooltip that's technically accurate but not user-friendly

- A Validator message that's unclear about what action to take

2. Adapt external content for Userlane

Many organizations create content by copying text from existing PDF manuals, training materials, or documentation. While this is a great starting point, external content is often too verbose or detailed for in-app guidance. The refine options let you quickly transform lengthy documentation into concise, action-oriented text suitable for any Userlane content type.

Examples:

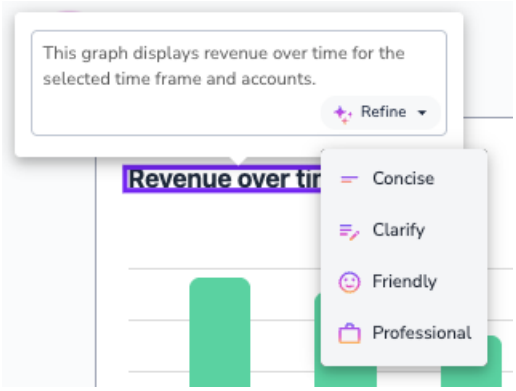
- Converting detailed training manual instructions into step-by-step Guide text
- Transforming technical documentation into user-friendly Tooltip hints
- Adapting formal policy language into clear Validator messages

---

How to Refine Text

1. **Select the text** you want to refine in your Guide step, Tooltip, or Validator
2. **Click the Refine button** in the Editor
3. **Choose a refinement option** from the four available styles (see below)
4. **Review the refined text** that the Content Agent generates
5. **Click Replace** to accept the changes, or close the window to keep your original text

The text is never replaced automatically --> you always have the final decision.



Refinement Options

Concise

Makes your text shorter and more direct while preserving essential information.

When to use:

- Your text is too wordy or repetitive
- Users need quick, scannable instructions
- You've copied content from detailed documentation
- Space is limited (such as in Tooltips)

Clarify

Makes your text easier to understand by simplifying language and improving structure.

When to use:

- Instructions feel confusing or ambiguous
- Technical jargon might confuse users
- Sentence structure is complex
- Users are frequently asking for help on this step

Friendly

Changes the tone to be more approachable, conversational, and encouraging.

When to use:

- Training new employees who may feel overwhelmed
- Consumer-facing applications
- Building confidence with inexperienced users
- Creating a welcoming onboarding experience

Professional

Changes the tone to be more formal and suitable for business environments.

When to use:

- Enterprise applications
- Compliance-related processes
- Executive-level users
- Financial or legal workflows

Automatic Error Correction

Regardless of which refinement option you select, the Content Agent automatically corrects any spelling or grammatical errors present in your text. This ensures your Guides, Tooltips, and Validators maintain a professional standard even when working quickly.

What gets corrected automatically:

- Spelling errors
- Grammar mistakes
- Punctuation issues
- Common typos

You don't need to proofread before refining --> the Content Agent handles quality control as part of the refinement process.

Best Practices

Choose the right refinement option for your audience

Consider who will use your content and what communication style they expect. New users typically prefer **Friendly** or **Clarify**, while experienced professionals may prefer **Professional** or **Concise**.

Use Concise for Tooltips

Tooltips appear as overlays and should be brief. The **Concise** option is ideal for making Tooltip text scannable without losing important information.

Apply consistent tone across content types

If your Guides use a **Friendly** tone, consider using the same refinement option for related Tooltips and Validators to maintain consistency throughout the user experience.

Review before replacing

Always review the refined text before clicking Replace. The Content Agent generates suggestions based on best practices, but you know your users and application best.

Iterate if needed

You can refine the same text multiple times with different options to compare results. Try both **Clarify** and **Concise** to see which works better for your needs.

Troubleshooting

The refined text doesn't match my organization's style

- Try a different refinement option that better matches your needs
- Manually edit the refined text after accepting it
- Provide feedback to help improve future refinements

The refined text lost important information

- Close the refinement window to keep your original text
- Try the **Clarify** option instead of **Concise** to preserve more detail
- Manually combine elements from both versions

Need more help?

Contact our support team through the Contact Us page.

Userlane Content Types

Last Modified on 17.04.2026

With Userlane users can learn and complete a specific task or process without requiring previous training.

Userlane overlays the application, guiding the user through an end to end process.

	Content Type	Why use it
Process Tracking	Tasks	Track multi-step workflows and user actions inside your application
	Tags	Track simple or single-interactions, e.g. did a user click a button, visit a page
Validation	Validators	Checks if an input is done correctly
Guidance	Guides	Step-by-step walkthroughs through processes in the application
	Tooltips	Explain an element to help users complete a process, can also be linked with a Guide
	Beacons	Highlight an element by drawing the user's attention with the help of a pulsating icon
Messages	Announcements	update Users on important update, process changes or reminders
	Standard Surveys	Gather feedback with customizable questions about application functionality or specific processes
	NPS Survey	Track your user’s loyalty and opinion based on how likely they are to recommend your app
	Welcome Slide	Welcome new users to the Userlane Suite within your application

When to use which Userlane content type

1. What's the User's Goal?

Goal	Example Use Case	Suggested Pattern(s)
Teach users how to perform a task or process	"How to create a report" or "How to configure account settings."	Guide
Explain or clarify an element on-screen	"What this field means" or "Why this checkbox is important."	Tooltip
Inform users about an update or change	"New dashboard design released!" or "Feature X moved to Settings."	Announcement
Track completion of a multi-step workflow	"User finished setup process" or "Completed training module."	Task

Track a single user interaction or visit	"User clicked 'Export' button" or "Visited Billing page."	Tag
Collect feedback or data from users	"How satisfied are you with this feature?" or "Was this guide helpful?"	Survey

2. Decision Criteria & Pattern Mapping

Criteria	User Action/Context	Complexity	Attention Required	Suggested Pattern
Purpose: Educate or onboard	User-triggered or on-demand	Few or many steps (one or multiple pages)	Moderate (walkthrough)	Guide
Purpose: Clarify or explain	User-triggered or on-demand	Simple or single-step explanation	Low (inline help)	Tooltip
Purpose: Announce or inform	Automatic or update-based	N/A	High (banner or modal)	Announcement
Purpose: Measure completion	Triggered by user actions or milestones	Multi-step workflow tracking	None (background tracking)	Task
Purpose: Track engagement	Triggered by user actions or milestones	Single interaction tracking	None (background tracking)	Tag
Purpose: Gather feedback or insights	Triggered after key interactions or at session end	Questionnaire or feedback form	Active input required	Survey

3. Quick Reference

Pattern	Desired Outcome	Trigger/Timing	Complexity	User Attention
Guide	Educate or onboard	User-triggered/On-demand	Few or many steps	Moderate
Tooltip	Clarify or explain	User-triggered/On-demand	Simple/Single-step	Low

Announcement	Announce or inform	Automatic/Update-based	N/A	High
Task	Measure completion	User actions/Milestones	Multi-step tracking	None
Tag	Track engagement	User actions/Milestones	Single interaction tracking	None
Survey	Gather feedback/insights	Key interactions/Session end	Questionnaire	Active Input

Userlane Editor checklist

Last Modified on 21.04.2026

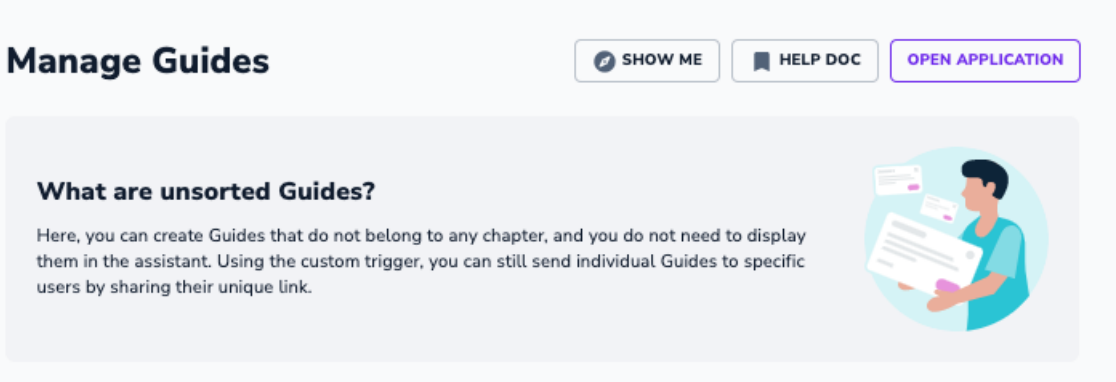
Why use it

The Userlane Editor is visible only to users that had been invited to the Userlane Portal as an admin, contributor, or moderator. These user roles have distinct rights to create, edit, or manage content. Some factors can influence the visibility of the Editor. This article contains a checklist of possible issues to look into for editor troubleshooting.

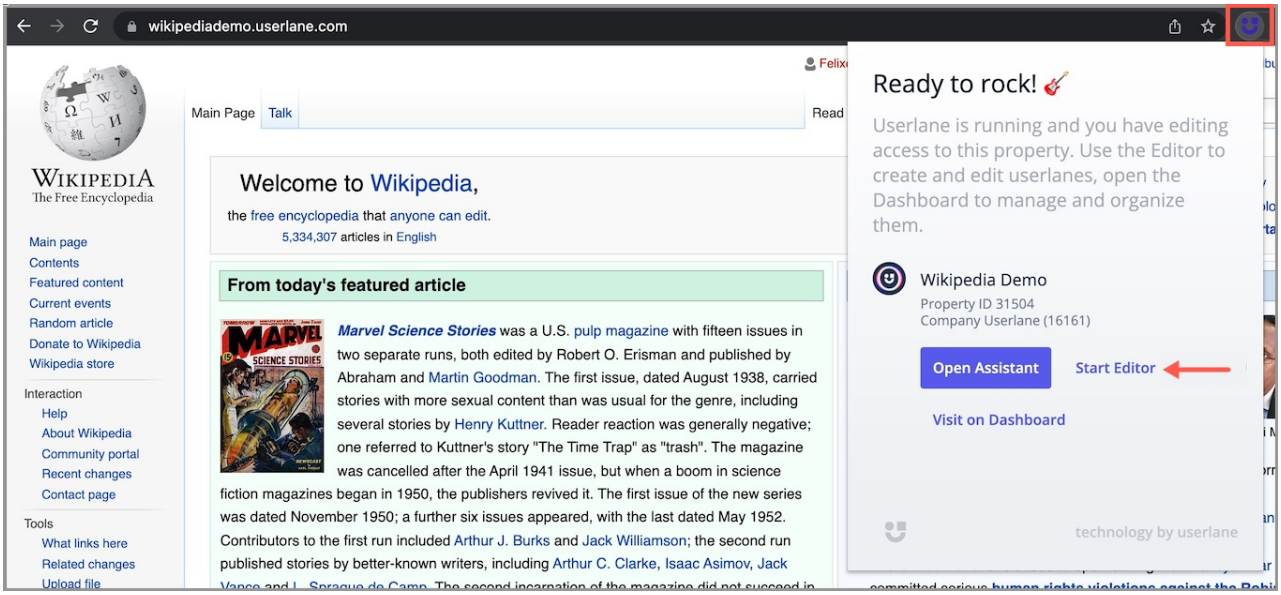
Open the Editor

There are three ways to open the Editor:

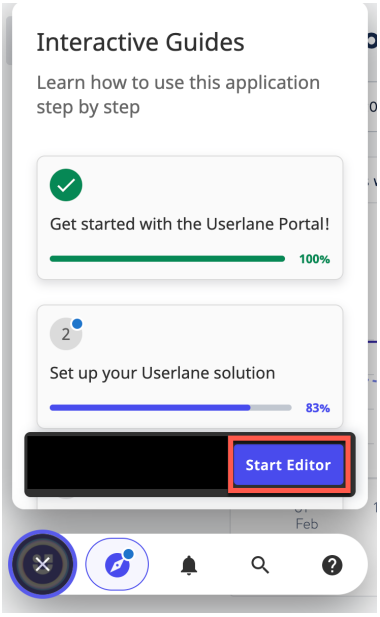
- Sign in to the Userlane Portal at family.userlane.com, go to Guides and click on Open Application. You'll go directly to your software where you will be able to edit the content.



- If Userlane is implemented via the browser extension, you can open the Editor via the browser extension. Go to your application, click the Userlane extension, then select **Start Editor.**



- You can open the Editor via the Userlane Assistant. Go to your Assistant, then select **Start Editor.**



Editor Checklist

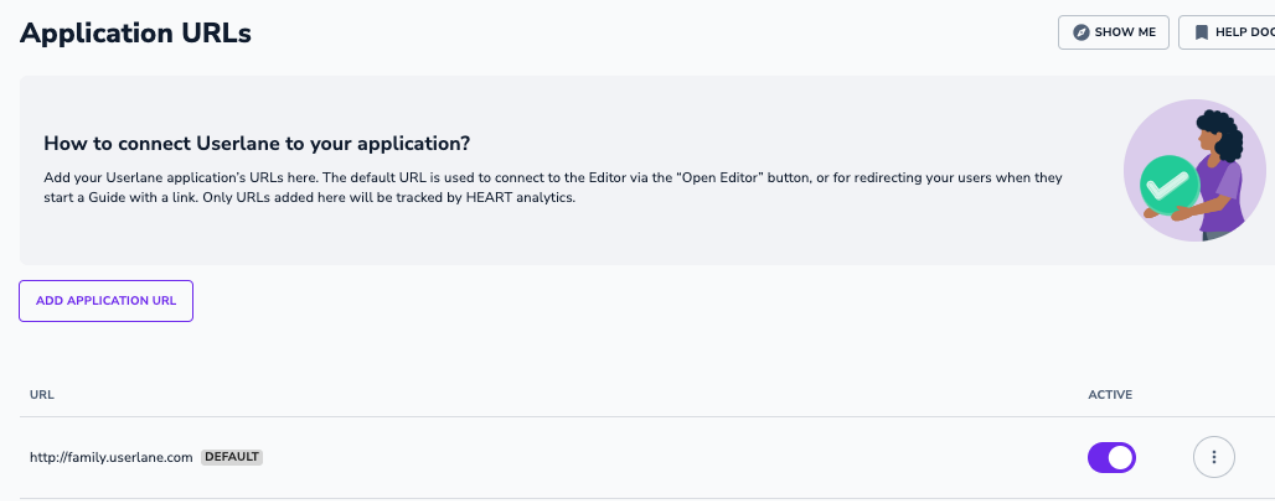
1. Make sure you are logged into the Userlane Portal

Check if you're signed in to the Userlane Portal at family.userlane.com in the same browser. Then, reload the page after you sign in to the Portal.

ℹ The cookie that stores the information about your account and access rights only works within one browser.

2. Make sure your application is added as an underlying application

Ensure that your software is added to your Portal. Sign in to the Userlane Portal at family.userlane.com. Click the Application dropdown then select **Settings > Application URLs.**



3. Allow third-party cookies

Some browsers block 3rd party cookies by default, including the ones coming from Userlane. This will block some of the Userlane elements. You can check if this is the case by allowing all cookies in your browser settings (only for the sake of testing).

If this has solved the problem, you can put the following domains in your browser's "3rd party cookie allowed list"

- your app's domain you want to use Userlane on
- Userlane's domain [*.]userlane.com

After you added these domains, you can switch the main cookie setting back to default.

You may need to ask your colleagues in IT for help.

ℹ For more on enabling the third-party cookies, please review the links below for your browser: Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge.

If none of the links above is beneficial for you, check the guidelines in the browser's help center.

As an alternative, there are extensions that allow third-party cookies. If you would like to use this solution, Userlane's underline application URLs should be added to those extensions.

4. Install the latest Userlane browser extension version

Userlane's browser extension should be updated to the latest version. This process may vary depending on the browser that you use. Please follow the guidelines provided by different browsers on how to update extensions.

5. Ensure you are not using an incognito mode / private tab

Note that the Userlane Editor does not work in private modes unless you have enabled private mode for extensions.

6. Deactivate any ad blockers

Some adblockers can prevent any cookies collection. Allow Userlane for your adblocker or deactivate it.

7. Your page is blocking Userlane

Sometimes the Userlane elements are not loading properly due to a Content Security Policy or CORS (Cross Origin Resource Sharing) Policy running on the underlying app and blocking unfamiliar sources. An indicator of this is usually a red error in the browser console where CORS or content security policy is mentioned along with Userlane. If this is the case, please share with your developers this article.

ℹ CSP is an added **layer of security** that helps to detect and mitigate certain types of attacks.

8. Clear your Cache and Cookies

At times previous website settings and histories impact how good websites run. After the browser history for all time is cleared, sign in to the Userlane Portal again and refresh your application page.

By following this Editor Checklist, you will be able to access and use the Userlane Editor seamlessly, allowing you to create, edit, and manage content effectively within the Userlane Portal.

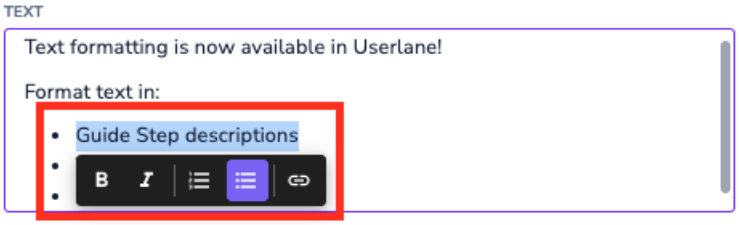
Text Formatting in Userlane

Last Modified on 10.12.2024

Text formatting empowers content creators to craft more engaging and professional content. With this improvement, you can now enhance your text with **bold** and *italic* formatting, organize information using bulleted and numbered lists, and insert hyperlinks for seamless navigation.

How to Format Text

When in the Userlane Editor or Announcement Builder, the formatting toolbar will appear when you highlight the text you wish to format as shown in the screenshot below.



Which content types can be formatted?

Text formatting is available for the following Userlane content types:

- Step descriptions in Guides
- Tooltips (both Hints and Beacons)
- Announcements

Why This Matters

- **Improved Engagement**: Highlighting key information ensures that your audience quickly identifies the most important parts of your content.
- **Better Organization**: Lists make complex information more digestible and easier to follow.
- **Enhanced Navigation**: Hyperlinks help guide readers to deeper insights and related materials without breaking their flow.

Tips for Getting Started

- Experiment with different formats to see what resonates best with your audience.
- Combine features, like bold headings and bulleted lists, for a polished look.
- Use hyperlinks strategically to connect users with valuable resources.

Additional Info

If you have formatting use cases that we do not currently address, please drop us the feedback at roadmap.userlane.com so that we can collect opportunities for improvement.

Text formatting is unavailable for:

- Select content

    - Welcome Slide
    - Guide titles and subtitles
    - Step titles
    - Announcement titles
    - Standard Surveys and NPS
    - Standard slide and button texts that can be configured on the Customize/Texts page in the Userlane Portal
- PDF Export
    - Formatted text will appear in the markdown syntax in your exported PDF

Working with images

Last Modified on 15.10.2024

We all know the power of a well-placed, well-chosen image. With Userlane you can quickly upload an image to enrich your Userlane content.

Why use it

Adding images helps to

- provide users additional context in your content
- make your content more discoverable
- promote your organization's branding and voice
- directly increase user engagement

Where to use it

You can customize images for the following content types:

- Userlane Assistant Avatar
- Welcome Slide
- Announcements
- Assistant Help
- Individual steps in Guides

Enlargable images

Images added to the Welcome Slide, Announcements, and Guide steps can be enlarged with a simple click so that users can view the image in greater detail. This enables you to add detailed images of process diagrams, organizational charts, and even screenshots of your application so the user has additional context to quickly and easily understand the task at hand.

Supported File Types

Depending on where you add images, there are different file recommendations and behaviors. Use the quick reference table below to learn more about the requirements for each use case.

	Avatar	Welcome Slide	Announcement & Help	Guide Step
Accepted file format	JPEG, PNG, GIF	JPEG, PNG, GIF	JPEG, PNG, GIF	JPEG, PNG, GIF
Image fit	Cropped	Original ratio	Cropped; centered	Original ratio
Recommended file size	>100kB	>300kB	>200kB	>200kB
Maximum file size	--	8MB	8MB	8MB
Recommended ratio	1:1	16:9	4:2	16:9
Recommended resolution	200x200px	900x506px	652x320px	900x506px
Minimum resolution	100x100px	450x253px	326x160px	348x196px
Rendered resolution	100x100px	450px width; no height limit	326x160px	348px width; no height limit
Note: Animated GIFs are not animated if used for your Avatar image. These are compressed and displayed at 200x200px.				

Create a Guide

Last Modified on 11.05.2026

Who can create a new Guide?

Any user role can create a new Guide, but only Moderators and Admins can publish or edit active Guides. If you are new to creating Guides, we recommend that you review our best practices and have a clear plan of the tour or process that you want to capture.

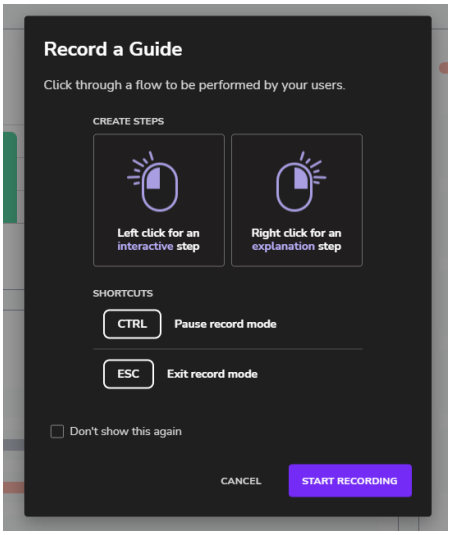
Recording a Guide

To record a Guide, you need to access the record mode corresponding to the content type (e.g., Guide or Tooltip) that you wish to create. For Guides that can be accessed in two ways from the Editor:

- Select Guides from the left sidebar, and then click on the Create button
- Click the dropdown arrow (▾) next to the Create button

Guide record mode

Once you access the recording mode, a modal will pop up explaining to you what actions can be performed:



- **Left click** to create an **interactive step**: interaction steps require user interaction with your app, which is particularly useful for deeper product tours and learning processes.
- **Right click** to create an **explanation step**: the simplest Guides are a path of explanation steps where users click **Next** in your Guide to proceed.
- CTRL key to pause record mode
- **ESC** key to exit record mode.
- **Don't show the modal again**: the modal will not show up if checked.

Record a Guide

To create a Guide:

1. Click **Start Recording**. The recorder captures every click you conduct and automatically creates a step. You can easily add steps to a Guide later if required.
2. Click through the process you would like to guide your users through. You can add the text and change other options later.
3. If you need to **pause the recording** to adjust your screen between steps, **press the CTRL key.** Press the CTRL button again to resume recording. This option works also when re-selecting elements.
4. Once you have recorded the steps, click the **Stop** recording button or **press the Esc key**. Your recorded step sequence is displayed with the last recorded step selected.

Now that you created the flow to be performed by your users, let's configure the steps.

Step options

Once you exit the record mode, each step can be configured in various ways. For example, you can change the example title and text of a step directly in the window of the recorded step.

All step options are located right next to the step box:

Reselect Element

Here, you can reselect an element. This is useful if you have selected the wrong element by accident.

Alignment

Here, you can change the preferred alignment of your step box. This is where the explaining text box should be shown. You are selecting a preference only, as the optimal position can differ depending on your users' screen size or visible elements.

Refine selector

The features available in this section provide the necessary flexibility to adapt and adjust element identification to the unique structure of your application.

Skip

The Skip option allows you to make specific steps of your Guide optional for users.

If a step contains a Skip option, the Step will be represented in the Editor panel with a dashed line.

Step type

During recording mode, you can create interaction and explanation steps. However, there are scenarios where you may want users to perform certain actions before moving forward other than clicking on the element or pressing the "Next" button. For example, you may wish to validate inputs or automate specific steps.

> To learn more about all step types available in Userlane, please check the following help article.

Interaction

You can define which type of interaction to apply for explanation steps:

- If allowed, users can interact with the highlighted elements without moving to the next step.
- If prevented, users cannot interact with any of the highlight elements.

Page reload

When a user does a full reload page, and the URL changes, or you move on to a new browser tab, you can set the option to 'Yes'.

When moving on to a new browser tab, Userlane closes the Guide in the current tab without triggering an exit or an error and opens the Guide in the new tab.

Add Media

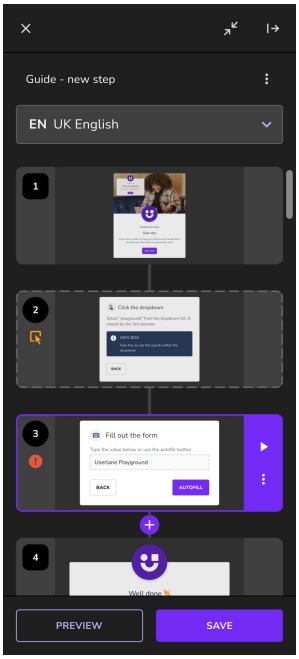
Click the + icon to add a link, info box, image, or video to a step. See Adding media to your Guides to learn more.

Saving a Guide

After recording the Guide, hit the Save button, choose the corresponding name and Chapter, and apply the changes.

Edit a Guide

Once you access the Guide you wish to edit, the Editor panel will look like this:



You can anytime access your Guide to add, edit, or remove steps. All possible actions are listed below.

Additional Guide actions

Next to the title of the Guide, click the More options (⋮) button that contains three actions:

1. **Auto-Translate Guide:** The translate functionality button is enabled after the latest Guide changes are saved and the corresponding ISO code of your language is in use.
2. **Take screenshots:** If you wish to export the Guide as a PDF, you need first to take screenshots of each step with the underlying app.
3. **Manage & Publish:** Once done editing the Guide, click this button to be redirected to the Portal in a new tab. Here, you can segment the Guide and publish it.
4. **Analyze:** once clicked, a new tab will be opened where you will be redirected to the Portal to visualize the analytics of the corresponding Guide.
5. **Delete:** if clicked, you need to confirm once more that you wish to delete the Guide.

Edit the Guide content in different languages

Below the Guide title is a dropdown from where you can edit the text shown to the users who wish to consume the Guide in another language. To learn more about translation in Userlane, check the following article.

Add a step

You can add one or more steps at any point in your Guide if required. First, click on the step before the point you want to insert the additional step(s), and then click on the "plus" button located under that step to enter the Record mode.

Another option is to hover in-between step card panels and click the "plus" button to enter the Record mode.

Edit a step

To edit a step, you need first to select it. To do that, click on the desired step card panel and adjust the step options and content.

Preview a Step

Once you are done editing your Guide, you can either test it by pressing the Preview button next to the Save button or start testing a Guide by previewing it from a certain step (by clicking on the Play icon ▶ on the right side of the step card). For the latter, click on the step from where you wish to start the preview, and click the Preview button on the right side of the step card panel.

 You can preview your Guide anytime to review changes and language versions or to test links.

Learn more about the different ways you can test your Guides in How to test your Guides before publishing them.

Note: Segmentation applied to guides will not be active in the editor

Take screenshot of a step

If you wish to take a new screenshot of the step, click the step options menu which you can find under the three-dot (⋮) menu icon and then the New screenshot button.

Auto-translate step

If you wish to delete a step, click or hover it, go to the step options menu, and then click the Auto-translate step

button.

Delete a step

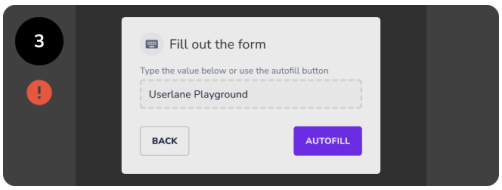
If you wish to delete a step, click or hover it, go to the step options menu, and then click Delete step button.

Step notifications

Besides the step preview, the Preview from this step, and the step options menu, the step card panel includes two additional icons displayed on the left side under specific circumstances.



The orange icon is displayed when you are located on a page where the corresponding element of the step cannot be found (it is either on a different page or could be located in a modal or dropdown). It will also result in displaying a notification when previewing the Guide that the First Step is not found.



The red exclamation mark icon is displayed when Userlane requires your attention. It indicates that at least one warning was triggered due to multiple errors on the step and needs to be checked.

> **Note:** If you want to learn more about building successful Guides, please check these best practices.

Define step navigation for your Guides

Last Modified on 08.02.2024

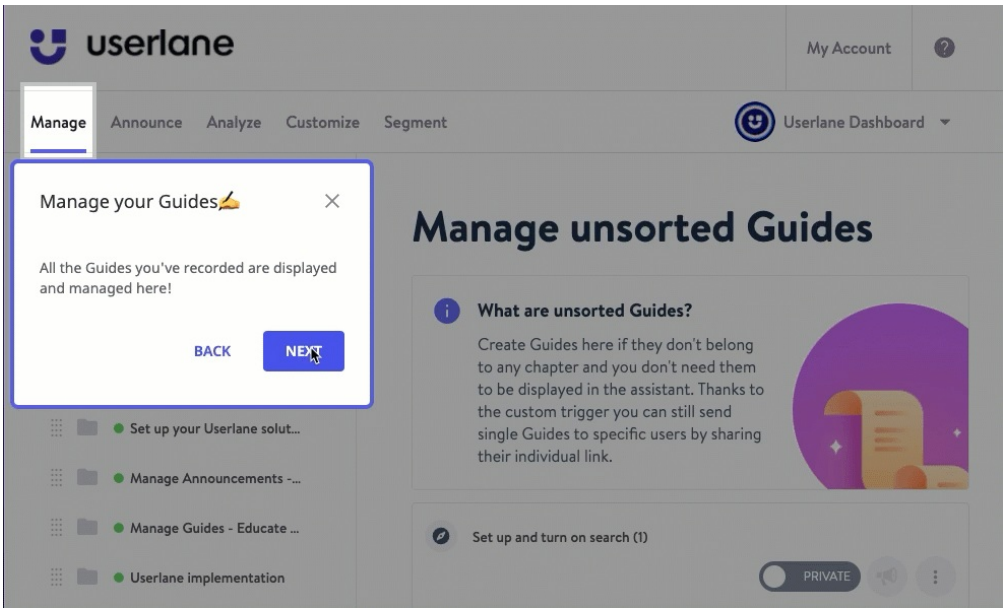
You can choose several options to determine how users proceed through your Guide steps.

Step types

You can record two types of steps: **Explanation** or **Interaction** steps.

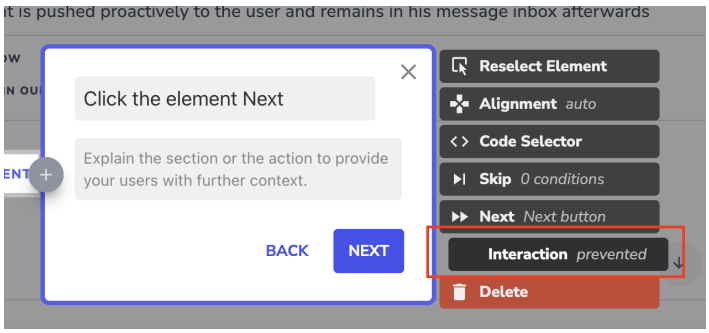
Explanation steps

The simplest Guides are a path of Explanation steps where users click Next in your Guide to proceed.



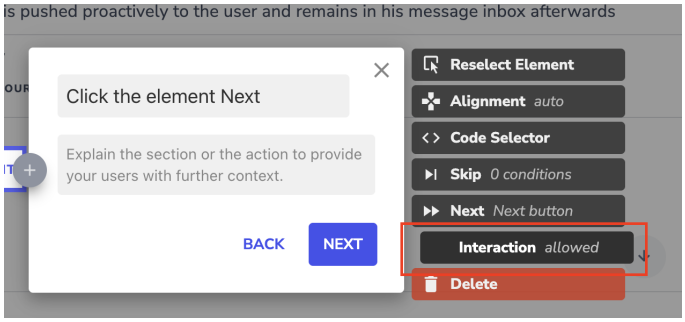
There are two kinds of explanation steps, where you can proceed with the “Next” button:

- An explanation step where interaction is prevented (Interaction prevented)



ℹ Explanation steps with interaction: prevented are considered optional and will be skipped if the element is not found.

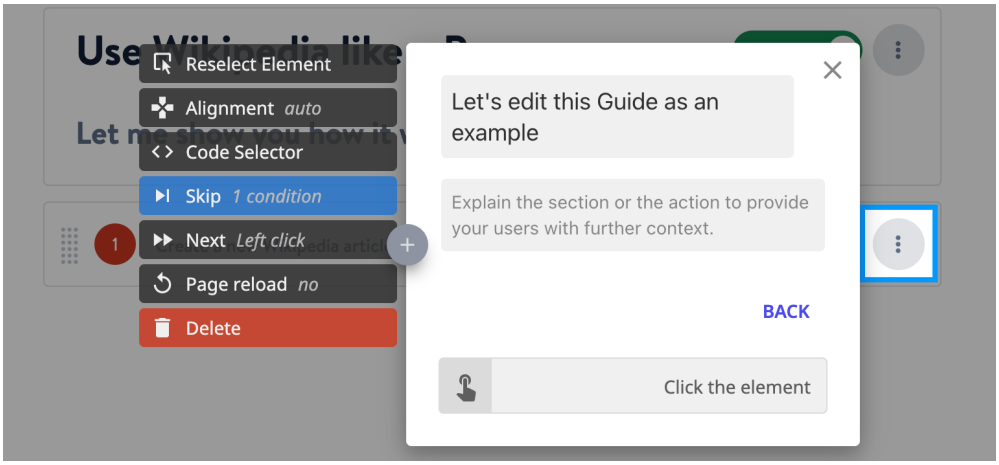
- An explanation step where the end user should interact with the highlighted area (Interaction allowed)



ℹ This step allows the User to interact with an element as many times as they want before moving to the next step. This could be used for elements that are self-explanatory and recording every element that does not make sense, e.g. date pickers.

Interaction steps

Interaction steps require user interaction with your app. These are particularly useful for deeper product tours, learning processes, or where input validation is required.



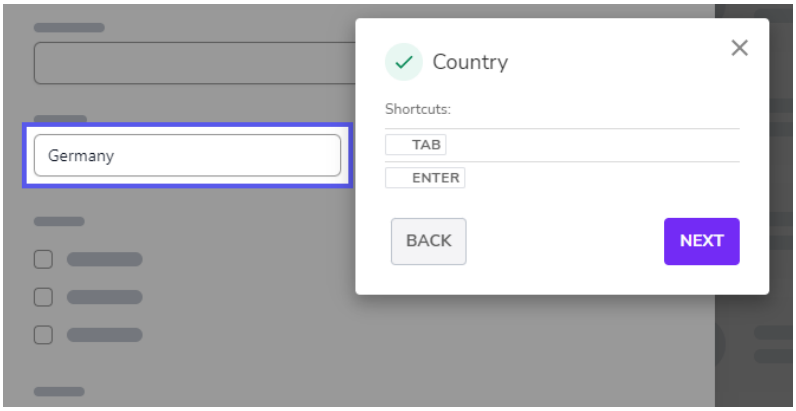
ℹ We recommend explanation steps for simple product walkthroughs and navigation tours and interaction steps for more complex navigation or process flows.

More step options:

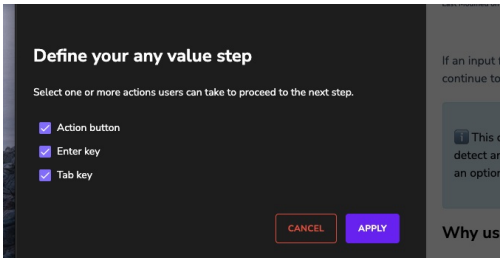
Any value

When a user needs to fill out a field at any step of your Guide, and you want the user to enter any value into an

input field, you can use the “Any value” option. This option can only be chosen if an input field or a system dropdown is recorded.

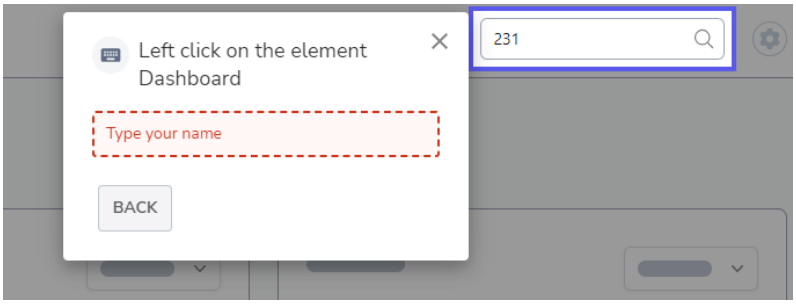


By clicking on Any Value you can specify what action needs to be taken to continue:

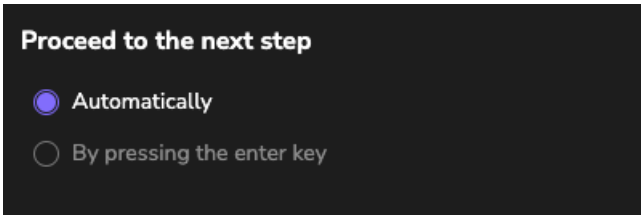


Specific value

If it is required for users to input a specific value or select a specific option in a system dropdown you should use the specific value option. The user can type in the needed value or use the autofill button. You can decide if the Guide should automatically proceed with "field remains active for input validation" (default setting), if it should automatically proceed with "field becomes inactive with input validation" or if the user needs to hit the enter key.



By clicking on Specific Value you can specify what action needs to be taken to continue:

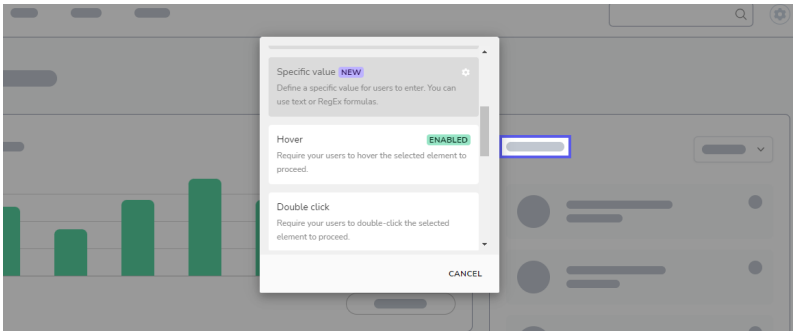


You can also use this step type to validate user input. For more information on validation, check the

following support article.

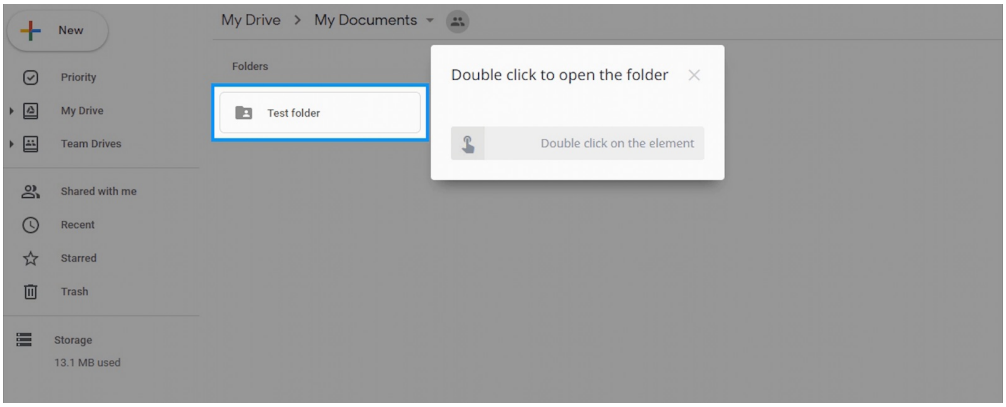
Hover

Use this option if the user needs to hover over an element in order to proceed to the next step. This step can not be recorded directly and needs to be adjusted in the Editor.



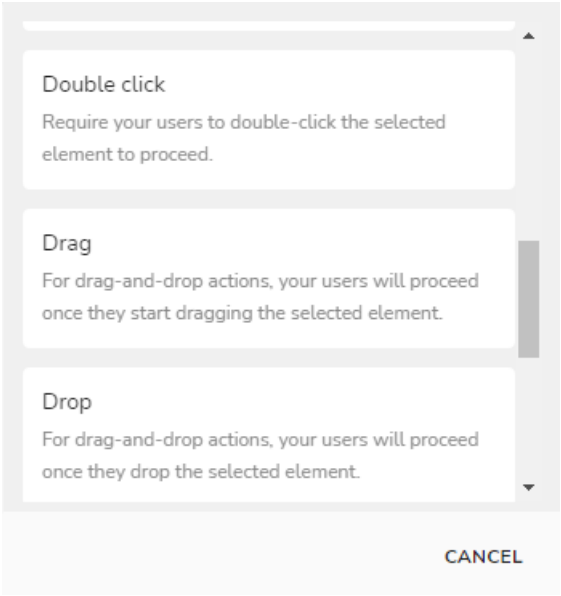
Double click

Use this if a double click is required for your application.



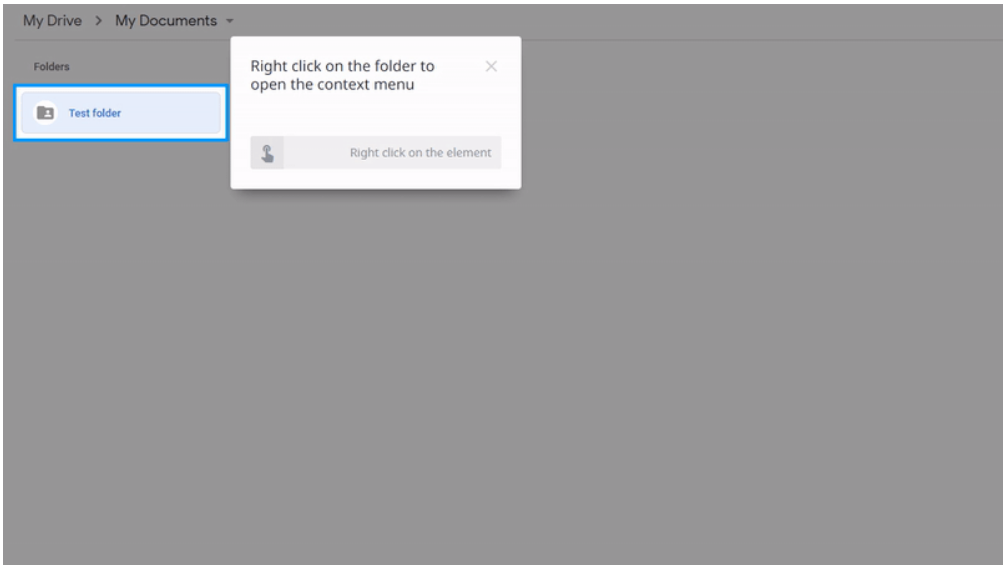
Drag & Drop

Use this when a user needs to drag and drop. This cannot be recorded directly. In a Userlane Guide, dragging and dropping are two individual steps. Thus, record the step where the drag should start in the Editor and choose “Drag” in the “Next” section. Then, record the step that the element should be dropped and choose “Drop” in the “Next” section.



Right click

The Guide will proceed when the user performs a right-click.



Left click mouse-down & right click mouse-down

Sometimes a left or right click element doesn't work. This might be the case if certain elements are defined as mouse-down elements in the page code of your application and would not react to a regular click. In these cases, you just redefine a step as a "left click mouse-down" or "right click mouse-down".

Some step types can be automated. To learn more about the automation options available in Userlane, check the following support article.

Including skip steps in a Guide

Last Modified on 13.03.2026

What are skip steps

Skip steps can be used for navigation or based on specific user behaviors and element visibility. You can activate skip conditions to ensure all users begin from the same starting point or skip redundant steps. The skip steps will not show for an end-user in all scenarios.

When to use skip steps

You can use skip steps

- For navigation
- For a specific behavior or action your end-users might perform

Skip steps for navigation

Navigation steps in Userlane Guides bring users to the correct starting point for the process in your application.

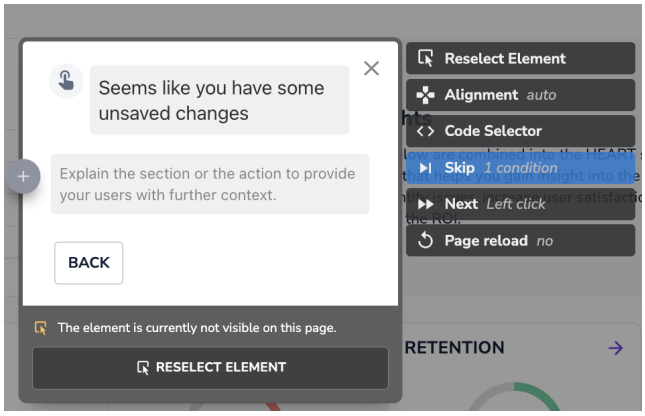
Example:

*From a **User perspective**:*

- You are on the Portal.
- You want to customize a color.
- You are currently not in the corresponding area (Customize area).

*From a **Guidebuilder perspective**:*

- You would record the Customize button and apply the “Skip if the next element is found” option. This way, users not in the Customize area would be directed there first and then see the following step.
- Users that are already in the Customize area would not see the step.



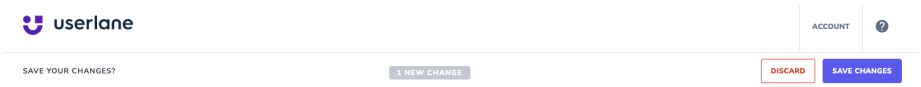
Skip steps for a specific action

Use the skip condition to show the step only to users who have performed a specific action. For example, your user forgot to fill in a field or forgot to save progress before moving on with the guide.

Example:

*From a **User perspective:***

- You are on the Userlane Portal.
- You changed a guide's step description but did not save it.
- You now want to start a Guide to learn more about Search.
- You will see the first slide, but then immediately, it will highlight this notification:



*From a **Guidebuilder perspective:***

- Not everyone might have forgotten to save, so you would record the “Save your changes” as a step and apply the “Skip if the element is not found” option.

Step skip options

The following two skip options are available in step settings:

- **Skip if the element of the next step is found**

Some steps are only necessary for the next step element to be visible. These are redundant when the element is already displayed to the user.

- **Skip if the element is not found**

Some elements only appear in specific situations and not for all users. Thus, the step can become redundant for some users.

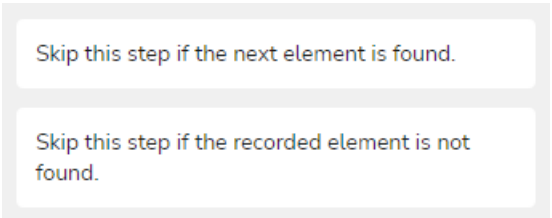
How to activate skip conditions

To apply skip conditions:

1. Select the specific step.

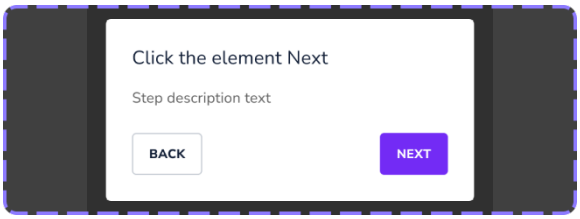
2. Click **Skip** in the side menu of the step box.

3. **Select** between the 2 options:



4. Click **Apply** to activate your changes.

5. Once applied, you will see dotted lines around the step that contains a skip condition.



Long page load before element appears

Some applications contain areas where page loading may take longer than usual. In these cases, a step may be skipped too quickly, or the required element may not be found. If you are aware of such situations in your application, please reach out to your Customer Value Manager to discuss possible solutions:

- in case of small delays: have the time before a step is being skipped increased
- in case of bigger delays: discuss the option of including a loading step within the Guide

How to record a form

Last Modified on 08.02.2024

If an input field or a system dropdown is recorded, your users need to enter an input to continue to the next step.

ℹ This option is only applicable for form input fields and dropdowns. If Userlane does not detect an input field for the step, neither Any Value nor Specific Value will be available as an option.

Why use it

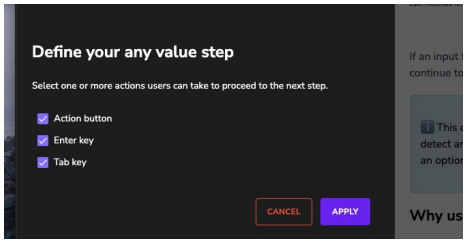
Using an input field

- Guides the end-users directly through a process quickly
- Saves end-users time by ensuring they fill in e.g. a mandatory field
- Reduces errors that occur when end-users manually enter information
- Avoids asking the end-users to enter/remember complicated texts that can be auto-filled

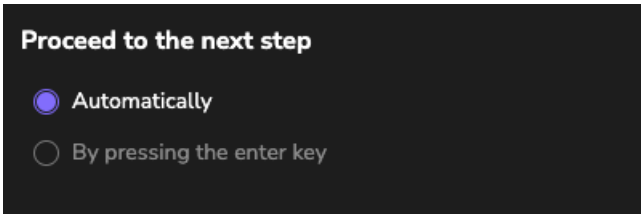
Input Field Types

Userlane offers two input types for smart form field recording.

- **Any value** means that a user can type in any text or number that they want to. That could be their name or address in a form field or the number of working hours during their last working day.
    - By clicking on Any Value you can specify what action needs to be taken to continue:



- **Specific value** the user has to type in something specific. This is the perfect option if you need to allow only a specific text or number to appear in an input field. Then, your users could either type in the specified value themselves or could use the auto-fill option. This step type has also the option to implement a filter (Regular Expression) that would accept only specific content. Read more about this option.
    - By clicking on Specific Value you can specify what action needs to be taken to continue:



Record an input field step

1. In Editor during the recording, click on the input field and optionally type in some value as well.
2. Stop the recording.
3. Then edit this step in Editor and check the **Next** selection.
4. If it is a form field, **Any Value** is automatically selected as the **Next option**. Your users now can type in whichever value they like into the form and easily continue by clicking enter, tab, or Next button.
5. If you would like to switch to **Specific Value**, choose **Specific Value** in **Next** Selection. Then you will be asked to type the required specific value.
6. With **Specific Value**, you can decide how the user will proceed after the condition has been fulfilled. A user can proceed automatically with the input field remaining active or inactive or by hitting the Enter key.

 When you are using Specific Value steps, check whether the specified value is the same in all languages.

Adding media to your Guides

Last Modified on 11.03.2026

Why use media

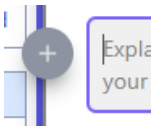
Adding media to a Guide step has various benefits:

- **Content Enrichment**: Give your users additional information, tips, tricks, and/or examples. Link to knowledge articles, other relevant websites, or another Guide.
- **Increase Understanding**: Visualize abstract processes or concepts that may be difficult to explain through text alone. Use images, videos, to preview the end results to help users grasp the content more easily
- **Attract Attention**: Use images, videos, or gifs to capture your user's attention in a specific step or slide.
- **Branding**: Use your personalized videos or images to position your product.
- **Gamification & Motivation**: Welcome your users with an introduction video, reward them with a GIF, or simply make them smile.

ℹ Remember that you are responsible for the content that you share. Ensure that you have the copyrights or permissions for the media elements you use.

How to add and delete media

- To add a media item to your Guide step, click on the "+" icon on the step to see the media options.



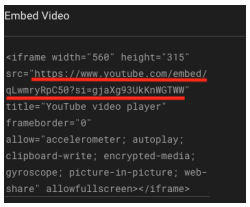
- to delete media, click on the delete icon on the step.



What can be added

You can add one media item to each step in a Guide. There are four types of media you can add:

Info Box	This media type allows you to highlight important information relevant to the context of the step. You can use an info box to provide a top tip, a warning, or any other noteworthy details.
Link	Add a link to an additional resource such as your help center, another Guide, or an insightful blog post. Please ensure that there are no spaces or commas within your URL but that it is a valid URL, e.g. www.userlane.com
Image	Images can be added via URL or file upload. Please learn here more about recommended file formats, sizes and resolution per use case.

Video	You can add a video by URL. The URL must be publicly accessible or if choosing private option, the setting to embed the video elsewhere must be enabled and that embed link should be used. Example for using the URL from an embed video code, only the underlined part is relevant to Userlane: 

Multiple language versions

If you have more than one language available for a Guide step, you can choose to apply this media to all languages versions. Enabling this option will overwrite existing media items in other languages, regardless of the media type.

If you delete a media item, it is removed only from the language version in which you are currently working.

Target specific text for an element

Last Modified on 17.09.2025

Why use it

You can add an element's text to the code selector to ensure accurate element identification in various situations. By smart matching of visible text within recorded elements, it allows for precise targeting.

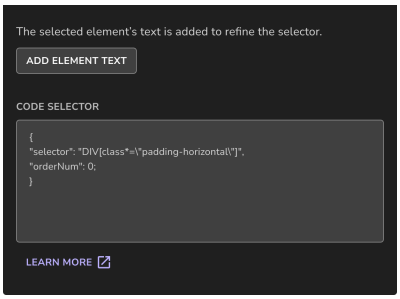
The content selector looks for visible text in your recorded element. If the text matches your input, the element will be found.

> **ℹ Important**
>
> - Only use this option when you can't select the element intuitively.
> - You can't use "text does not contain". The available options are "contains" and "matches".

How to add the text to the code selector

For Guides, access a Step and click on Refine selector step option. For Tooltips and Tags, click on the entry you wish to edit, open the Selected element section, and click on Refine selector.

Then, open the code selector and look for "Add element text" button.



Add the element's text automatically

When Userlane detects a text, you have the option to click on the "Add element text" button. This will automatically update the selector to include text from the element. If the button is not available or the content of the element isn't found, you can add and update the selector text manually.

Add the element's text manually

- Add a comma at the end of the "orderNum" line
- Copy and paste this code just after the added comma:

```
"content": {
   "type": "contains",
   "value": "Insert your text here"
}
```

- Replace the “insert your text here” part with the text you want the selector to look for (e.g., “Settings”).
- Click “Apply” to save your code selector.
- **Contains vs Matches**
  - **Contains** → looks for part of the text
  - **Matches** → looks for an exact text match
  - If wording appears multiple times, use **Matches**.

How to use OR and support multiple languages

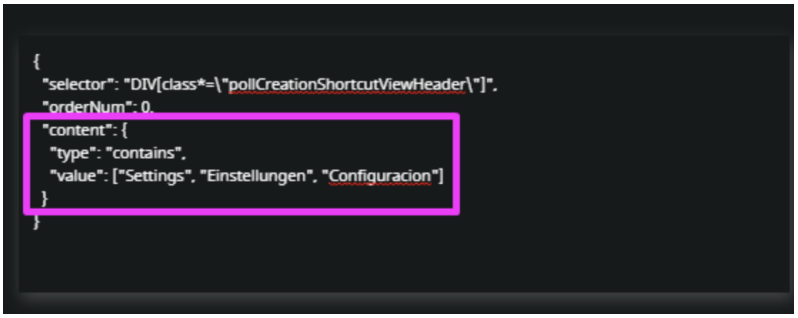
If your application has more than one language and Userlane content is also available in more than one language, it is important to ensure that the code selector covers all applicable languages.

- Copy and paste this code at the value line in your selector window:

```
"value": ["text-first-language", "text-second-language", "etc."]
```

This code will do the following: If Userlane finds "text-first-language" OR "text-second-language" OR "etc." as text in the element, then the element will be found.

- Change the placeholder texts to your different languages.



Adjust the selector

Last Modified on 11.03.2026

Why use it

The code selector allows you to fine-tune the selected element in Guides, Tooltips or Tags within your application. By manually defining the code selector, you can ensure it finds the desired elements accurately. It provides the necessary flexibility to adapt and adjust element identification to the unique structure of your application.

ℹ Some of these settings can be implemented through the UI. Read more about refining the selector here.

How it works

This article covers the following topics:

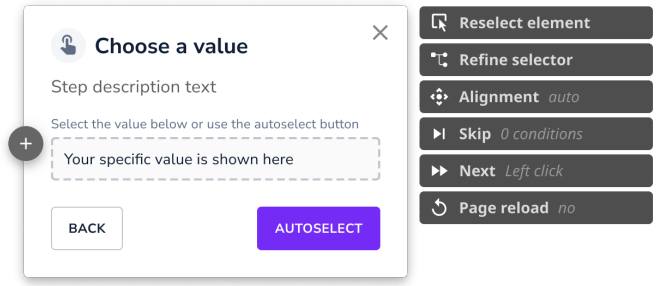
- Understand the Userlane code selector structure
- How to element text
- How to add a subSelector (e.g. for iFrames shadowDOMs)
- How to use ParentNum for a bigger element frame
- How to append a Tooltip or Step to the target element
- How to add Selector Rules

Troubleshooting Checklist

To quickly diagnose why a Selector cannot find or highlight an element, we have prepared a Selector Troubleshooting checklist. You can download here the Userlane Selector Troubleshooting Checklist.pdf .

Where to find it

For Guides, access a Step and click on Refine selector step option:



For Tooltips and Tags, click on the entry you wish to edit, open the Selected element section, and click on Refine selector.

Userlane Code Selector structure

Structure basics:

	HTML code	Respective code in Userlane selector
Recorded element	<div class="userlane-slide-base userlane-base" <input id="userlane-search"	{ "selector": "DIV.userlane-slide-base.userlane-base > INPUT#userlane-search", "orderNum": 0 }
General structure	<div class="element class" <input id="elementid"	{ "selector": "DIV.element.class > INPUT#elementid", "orderNum": 0 }

- **Red:** The value for the code selector defines the highlighted element, e.g. a DIV box or an INPUT element.
- You can **separate multiple elements** by space or greater than character (>). Doing so allows you to go one level deeper in the code structure (you select a more specific element within the bigger element).
- **Blue:** The class of an element is added to the element with a dot ('.'). If the element class has a space in its value, use another dot instead of the space. A space would mean to go an undefined level deeper in the code structure.
- **Yellow:** The ID of an element is added to an element with a '#' (see *Example 1*)
- You can refine element selection with **=** or ***=.** If you apply `=`, the class, for example, must be exactly the value that follows `=`. If you add `*=`, the class must *contain* the value that follows `*=` (see *Example 3*).
- orderNum defines the **number of elements that match the code selector value** It starts with 0, so if the orderNum is 2, the third element that matches the code selector value will be chosen.

Example 1: General code selector structure with class and ID:

```
{
"selector": "DIV.element.class > INPUT#elementid",
"orderNum": 0
}
```

Example 2: Code selector structure with attributes

```
{
"selector": "INPUT[readonly=\"true\"].main-element",
"orderNum": 0
}
```

Example 3: Code selector structure with (stable) parts of attributes or classes

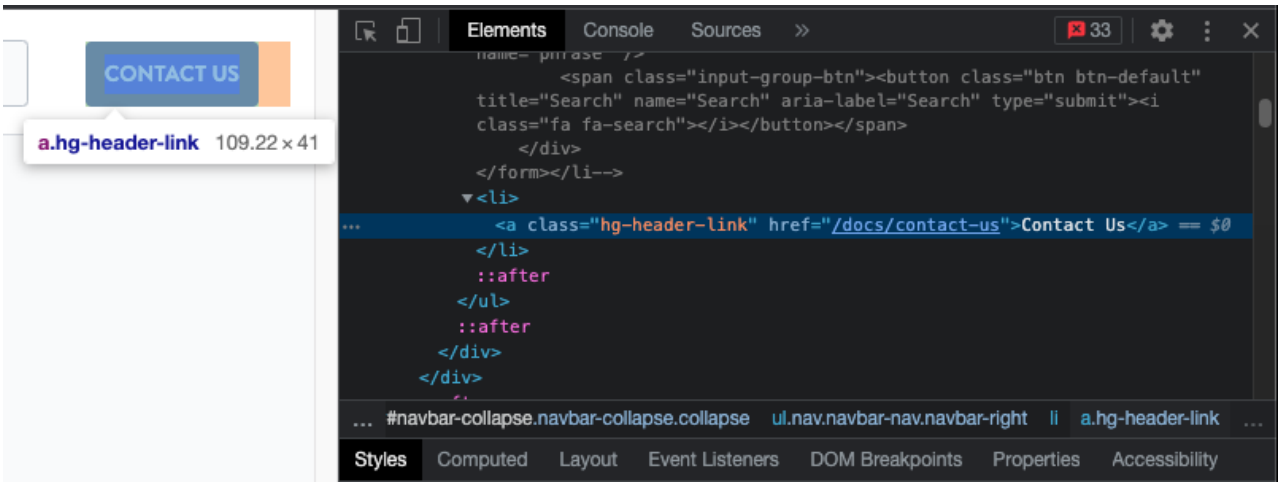
```
{
“selector”: “DIV[class*=CustomerSearch__InputContainer] INPUT[class*=SearchInput__StyledInput]“,
“orderNum”: 0
}
```

How to manually adjust the code selector

Change the value of an element

With the rules above, you can look up any element in your browser’s developer tools and define the code selector value. To get to the HTML code, you can right-click on the element and click at ‘Inspect’.

Example:



Add element text

You can modify the selector to ensure it chooses an element with that specific content or text. The detailed process is described in target specific text for an element with the content selector.

Example:

```
{
"selector": "label",
"orderNum": 1,
"content": {
"type": "contains",
"value": ["text-first-language", "text-second-language"]
}
}
```

This is a content selector with "type": "contains". Therefore, only a part of the element's text must be typed into the code selector. If you want to make sure that an element with the exact same text written in the element is selected, you can use a content selector with "type": "matches":

```
{
"selector": "label",
"orderNum": 1,
"content": {
"type": "matches",
"value": ["text-first-language"]
}
}
```

Adding a subSelector (e.g., for iFrames and shadowDOMs)

Userlane automatically detects if an application is built with iFrame or shadowDOMs and then automatically applies a SubSelector.

SubSelectors are useful for a more precise context based selector.

The detailed process how to create a SubSelector is described inthe article on SubSelectors.

Example:

If there are many similar things on the page (like several “Edit” buttons), a sub-selector tells Userlane, “Choose the one that’s inside *this* section or row.”

Let’s assume:

- The table has the class `customer-table`
- The row you want has the class `row-customer-123`
- Inside that row is an **Edit** button with the class `btn-edit`

```
{
 "selector": "TABLE.customer-table TR.row-customer-123",
 "orderNum": 0,
 "subSelector": {
   "selector": "BUTTON.btn-edit",
   "orderNum": 0
 }
}
```

This could further be expanded with additionally using a Content Selector.

```
{
 "selector": "TABLE.customer-table TR.row-customer-123",
 "orderNum": 0,
 "content": {
  "type": "contains",
  "value": ["Customer Overview"]
 },
 "subSelector": {
  "selector": "BUTTON.btn-edit",
  "orderNum": 0
 }
}
```

Example for Iframe:

```
{
"selector": "IFRAME#same-origin-iframe-id",
"orderNum": 0,
"subSelector": {
"selector": "DIV.example.class",
"orderNum": 0
}
}
```

With this selector code, the Userlane selector would search for a DIV element with the class ‘example class’ (subSelector), which is inside the iFrame element with the ID ‘same-origin-iframe-id’ (selector).

Adding parentNum

ParentNum will take the selected element's ascendant (‘parent’). This is useful when you need to enlarge the highlighted area of a specifically defined element. This is also helpful for selecting elements bigger than the target element you want to highlight, especially when you want your Guide to appear visually more appealing. Here is a code example with parentNum value of 2 - it selects the ‘grandparent’ element (two levels up) of the targeted DIV-box.

Example:

```
{
"selector": "DIV.element-class",
"orderNum": 2,
"parentNum": 2
}
```

Ignoring Opacity

This is useful when some elements in your page have oppacity:0 until a user hovers over them. You can add this to your selector if you wish to have Userlane find the element even if it's not visible to the end user.

Example:

```
{
 "selector": "DIV > DIV > DIV > DIV > BUTTON > SVG",
 "orderNum": 0,
 "ignoreOpacity": true
}
```

Adding appendToTarget

This selector helps with issues related to the z-index settings of your application.

Z-index is a setting that decides which elements are in front on a webpage, with higher values moving elements to the front.

We calculate the z-index of the target element to ensure that different content types, such as Hints with icons or Beacons, are correctly displayed when end-users interact with the underlying app. However, there are situations in which the styling of the underlying app impacts the z-index calculation.

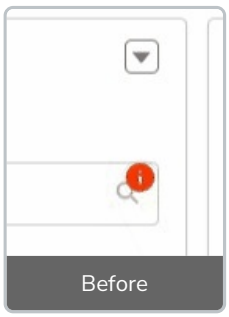
A consequence of this is having Tooltips with icons, Beacons and Guide steps displayed on top of elements of the underlying application e.g. for modals or dropdowns.

If that is the case, Managers can manually adjust the code selector value of the Userlane content type by appending it to the target element. Add the “appendtoTarget”: true key-value pair to the code selector to do that.

Selector Example:

```
{
"selector": "DIV.element-class",
"orderNum": 2,
"appendToTarget": true
}
```

The result:





Add Selector Rules

At times when recording Userlane picks up elements where attributes are auto-generated and are not stable enough to ensure the Guide will always run smoothly. In order to ensure that the Userlane recorder picks up stable elements, you can create selector rules in the Userlane Portal.

This allows to insist on or block certain element attributes when recording elements. You can find this option under Application Settings > Selectors.

Element Attribute	Stable?	Why
`data-userlane-id="createUser"`	✅ Yes	Intentional & semantic
`data-test-id="emailField"`	✅ Yes	Built for automation
`id="btn_928374"`	❌ No	Likely auto-generated

Note: Depending on the CSS styling of the underlying app, the Userlane content types may be impacted differently by having it appended to the target element. Therefore, we recommend testing this functionality using the Preview function for each Userlane content type before making the change available to all users.

Good to know

- **The code selector can only be saved when the syntax is correct.**We suggest you always copy-paste the examples from this article and then adapt the new selector so you do not forget a comma or quotes.
- **Pick a stable selector.** Choose an element that's unique and unlikely to change.
- **Test with different data/UI states.** Ensure it works when rows are reordered or content changes.

Add Step input validation

Last Modified on 21.04.2026

About Data Validation

Data validation is a feature available in specific value steps allowing managers to validate users' input. The Managers can use the data validation feature available in Userlane to ensure data quality while helping users learn processes and complete tasks.

In a specific value step, the Guide only advances when the user's input matches a predefined text string or regex pattern. This is in contrast to an any value step, where the Guide advances as soon as the user types anything into the field.

Why use it

This feature will help you achieve the following results:

1. Enhance Data Quality: Utilizing the input validation option in Userlane's specific value steps allows managers to validate users' input, ensuring accurate and reliable data for processes and tasks.
2. Improve User Learning: By implementing data validation, managers can guide users through the correct input format or pattern, helping them learn and understand the required input criteria.
3. Streamline Processes: With data validation, you can enforce specific rules or patterns, such as validating email addresses or enforcing password complexity, reducing errors and enhancing the efficiency of your processes.

Examples

This functionality can be used in various scenarios - check a few examples below:

- when entering your business expenses, you want to increase the data quality by asking your users to submit the final cost using a comma (,) as a decimal separator
- ensure that no empty form fields can be submitted
- when collecting email addresses from various stakeholders, confirm if each entry contains @ and a dot (.)
- throw a validation error if the password a user wants to use is too weak (e.g., less than 12 characters)

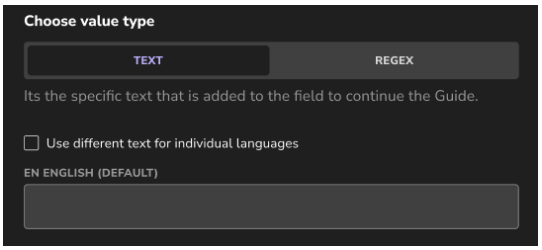
Ultimately, the goal is to collect correct and useful information for your processes.

How to use this feature

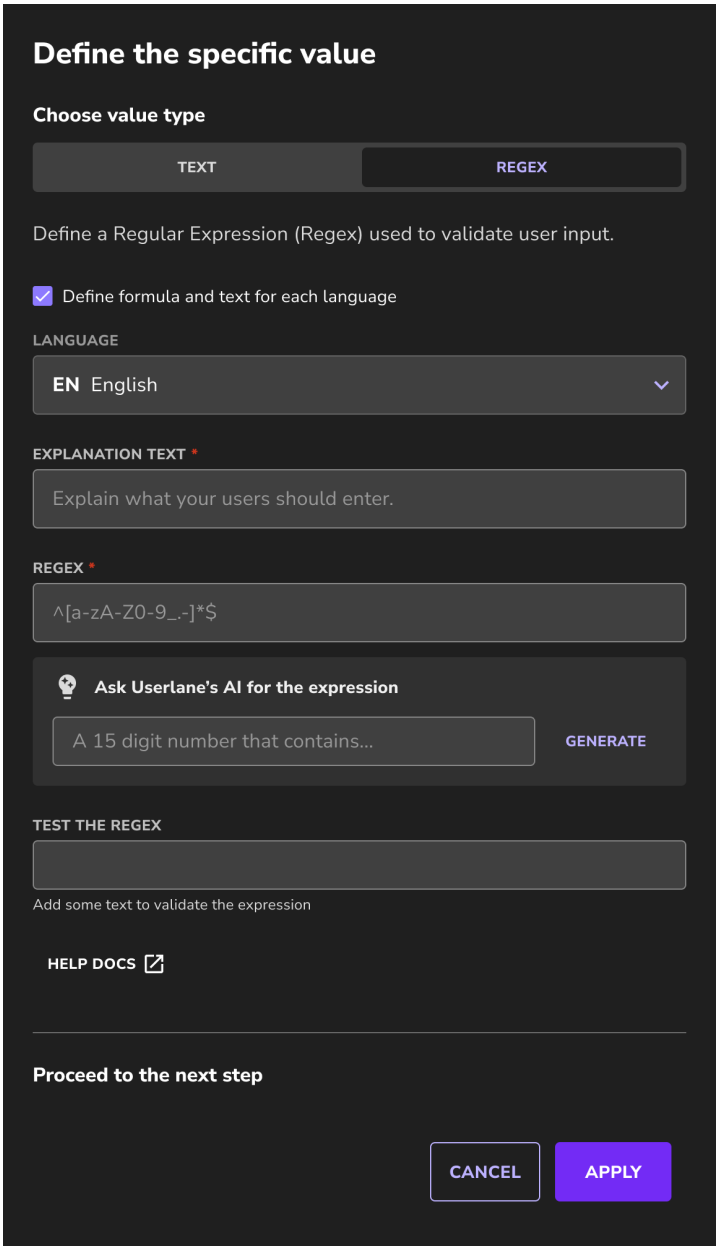
For data validation, the Managers can match the user input with a pre-defined **Text** or the user input with a pattern created with the help of a **regular expression (regex)**.

Data validation with the help of a pre-defined text

If the Text option is chosen, you can define the text users must enter to proceed.



If the text is not matched, users cannot continue the Guide.



Data validation with the help of a regular expression

You can define a regular expression to validate the user input if regex is chosen. The following fields are available:

Explanation field

- Use this field to explain to the users what needs to be filled out to proceed to the next step.

Regular expression

- Enter here the sequence of characters that specify a match pattern in a text.

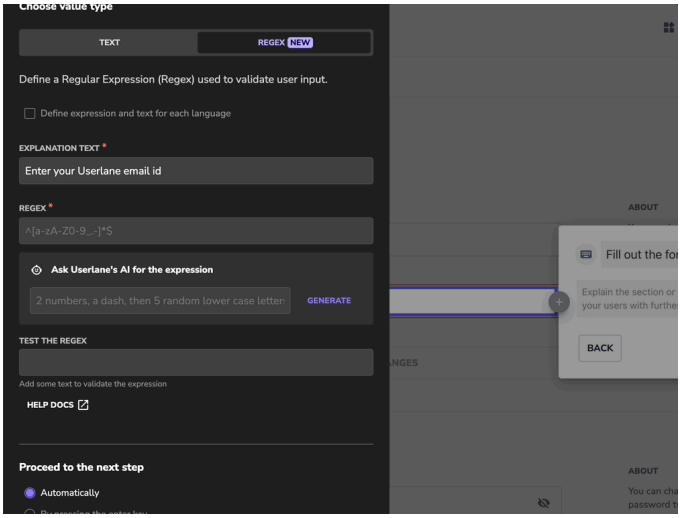
> ℹ To learn about regular expressions, please check the following help section.

Test field

- Test your regex in this field to see if the pattern is correct.

Ask the AI to generate the regex

- Ask Userlane to generate a regex following the described pattern and testing example. For example, you can ask Userlane to generate a RegEx that accepts only email domains from your organization.



> ℹ The "Generate" feature relies on OpenAI API, a service provided by Microsoft. No Personal Identifiable Information (PII) or Sensitive Personal Information (SPI) is being processed when used. No prompts or completions are stored in the model during these operations, and prompts and completions are not used to train, retrain or improve the models.
>
> For additional questions, please don't hesitate to contact our Customer Success Team.

> ℹ A different regular expression will be created whenever you press Generate. For example, if you only ask for German mobile numbers to be accepted, Userlane may generate either the international or local format. Therefore, we recommend checking and using the testing field to confirm whether the generated regex is the one you wish to use to validate the entries.

Define text or pattern for each language

If you work with a multilingual underlying application and audience, you can define a specific text input or

regex for each language. If users complete the Guide in English, they need to type in "string A" to proceed to the next step, while users in German need to type in "string B".

Proceed to the next step

Managers can decide to have their users proceed to the next step automatically or by pressing the enter key.

> ℹ Use the "Enter" key option to allow end-users more time to check what they entered in the input field.

Check Portal > Customize > Texts > Specific value steps to customize the step box design and colors.

Frequently asked questions

Can I use data validation on any form field type?

Yes, on most common input elements — text fields, number fields, and email fields — as long as they are <input> or <textarea> HTML elements.

Can I edit the validation rule after publishing?

Yes. You can edit a step's validation settings at any time from the Userlane Editor.

I don't know how to write a regular expression. What should I do?

Use the AI generation feature — describe the desired pattern in plain language and Userlane will generate the regex for you. See also the related article on regular expressions linked below.

My regex looks correct but users still can't advance. What should I check?

- Use the test field to verify the pattern against a sample valid input.
- Check for leading or trailing spaces in the input that the regex doesn't account for.
- Confirm the correct pattern is set for the user's active language.

Translate a Guide

Last Modified on 08.05.2026

About Translation

After a Guide was recorded and language management best practices were followed, you can start translating your Guide content.

The guide can be translated either:

- within Userlane
  - the Userlane Editor
  - the Userlane Portal
- outside Userlane via export and import (XLSX or CSV) to work offline on it anytime, and import it when ready.

> **ℹ Important**
>
> Before continuing, ensure the languages are available in Userlane by adding them from the Portal. For more information on language management, check the following article.

Translate Guides within Userlane

Within Userlane, you can translate a Guide and its corresponding steps from the Portal or the Editor.

Translate Guides within the Userlane Editor

You can translate Guides from the Editor automatically or manually.

Automatic Guide translation

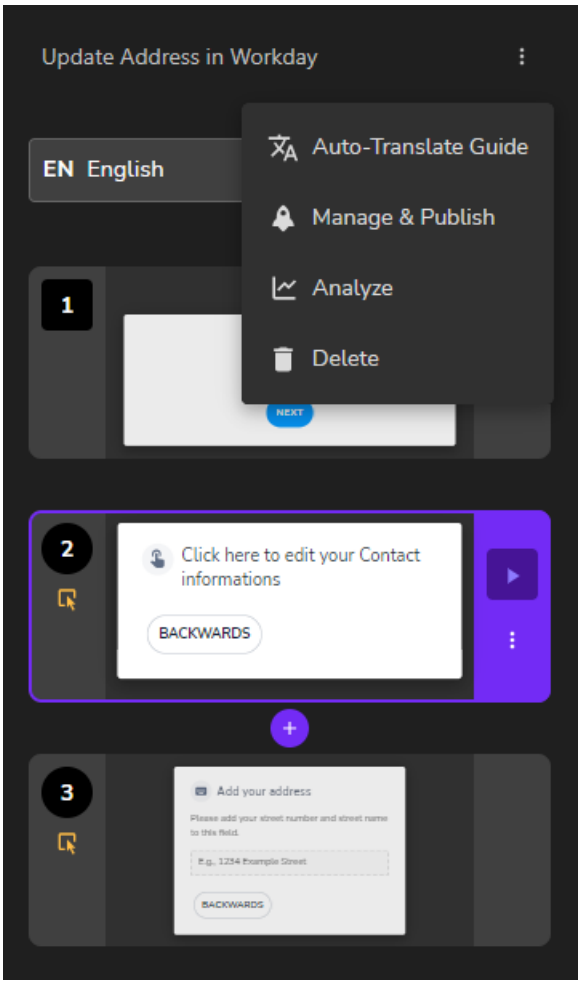
One option to translate your content is to use the auto-translate functionality. Some advantages include:

- **Cost savings:** Automating certain parts of your processes allows users to focus on tasks that bring more value to your organization.
- **Increased efficiency:** Translators will provide only minor changes by double-checking the translation before setting the Guide live.
- **Improved User Experience:** Providing content in users' native language enhances their experience, making it easier for them to understand and engage with the information.
- **Enhanced Communication:** Utilizing different languages allows you to effectively communicate with diverse user groups, including international customers, employees, or partners. It fosters better understanding and strengthens relationships.

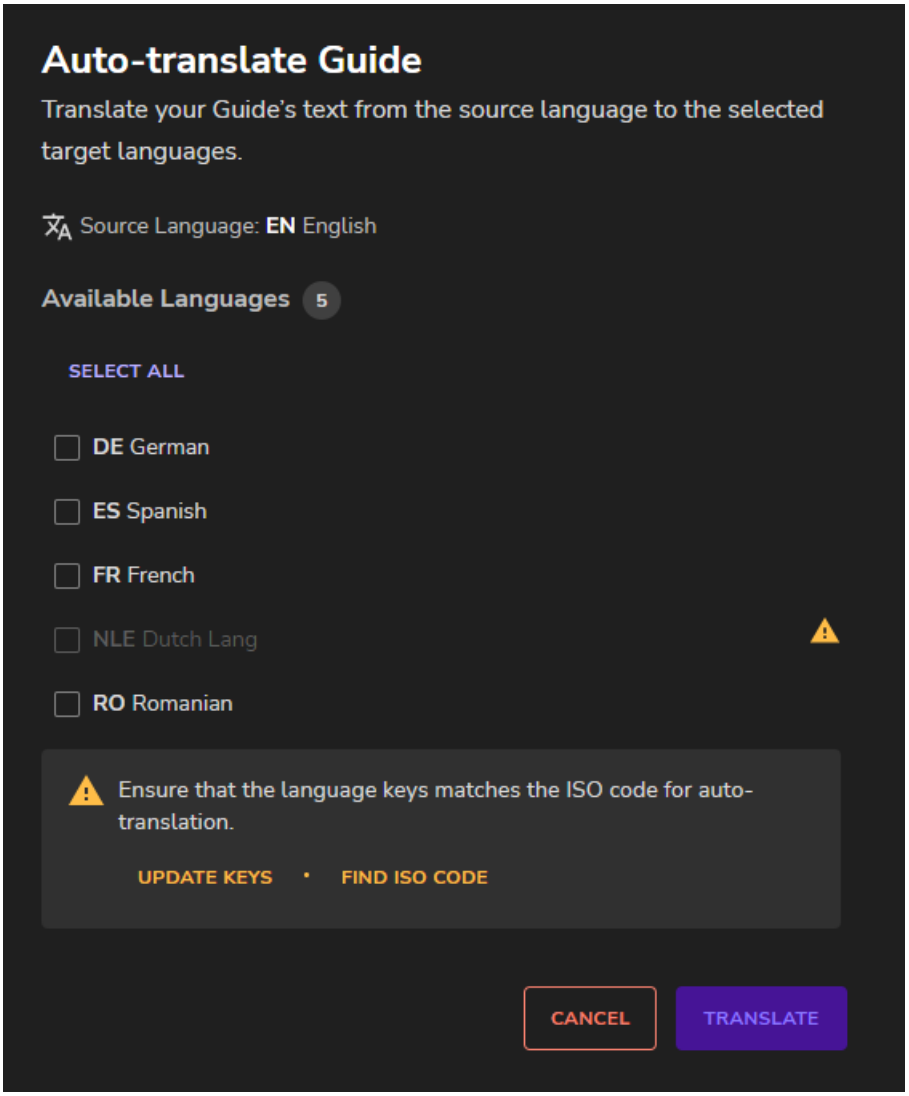
> ⚠ Auto translation also has limitations and potential drawbacks, so we recommend all translations be double-checked before setting them live.

ℹ To have the auto-translation button enabled in the Editor, ensure that your latest Guide changes are saved and that you use the right language key.

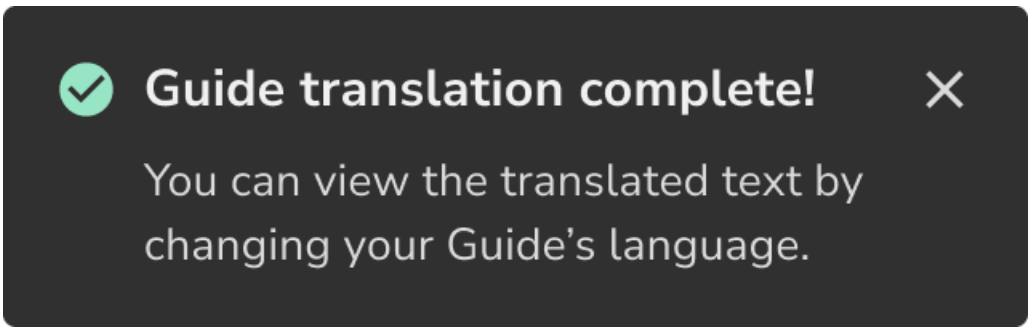
To translate a Guide, open the more-menu section and click on Auto-Translate Guide.



This feature helps you translate your Guide's text from the source language to the selected target languages.



During the auto-translation process, you cannot edit the Guide's text - a notification will be displayed once the translation is finalized.



If you want to translate only steps, please open the step's more-menu section and click the auto-translate button.

ℹ The "auto-translate" feature relies on OpenAI API, a service provided by Microsoft. No Personal Identifiable Information (PII) or Sensitive Personal Information (SPI) is being processed when used. No prompts or completions are stored in the model during these operations, and prompts and completions are not used to train, retrain or improve the models.

For additional questions, please don't hesitate to contact our Customer Success Team.

Benchmark tests

Depending on the Guide's complexity and length, Userlane may need extra time to finalize the auto-translation process. When the process is started, it runs in the background for a couple of minutes until it is finalized.

Case	Steps	Languages	Total time
1	8	10	0:01:33
2	8	20	0:04:03
3	15	10	0:07:06
4	5	5	0:00:14
5	10	15	0:03:45
6	3	12	0:01:11
7	12	7	0:02:30

ℹ If a translation takes longer than 5 minutes, you will see a notification saying "Translation is taking longer than expected". In this case the job on Userlane side is still being done. There is no need to retry and you can come back later to see the final translation.

Manual Guide translation

To manually translate Guides in the Editor:

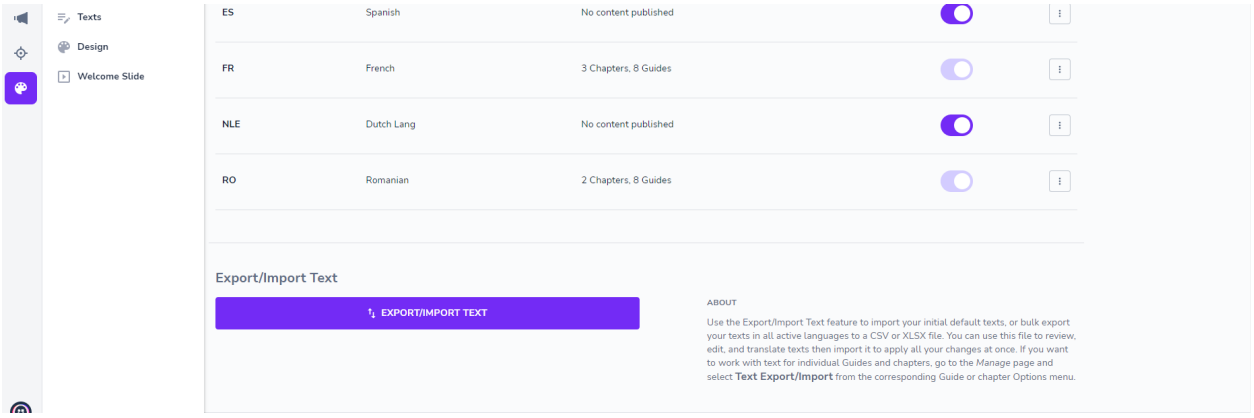
1. After you open the Editor, access the Guide you wish to translate.

2. Click on the Language dropdown and select the Language you wish to work on.

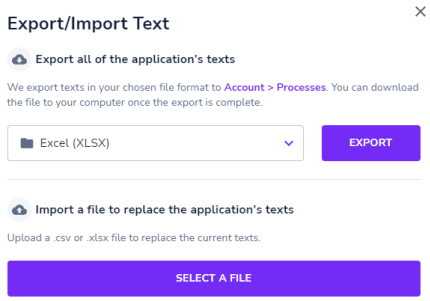
Translate Guides outside Userlane

Use the Export/Import Text feature to import your initial default texts or bulk export your texts in all active languages to a CSV or XLSX file. You can use this file to review, edit, and translate texts, then import it to apply all your changes at once.

To access it, go to Customize > Languages and Texts > Export/Import



When you click Export/Import, a modal describing the export and import processes will pop up.



If you want to work with text for individual Guides and chapters, go to the Guides page and select Text Export/Import from the corresponding Guide or Chapter Options menu.

ℹ Important

- Any "<missing element>" placeholders in the exported text will be replaced with relevant info box content or localized links upon re-upload.
- Modifying the file (including the original language) will apply changes after importing, even to the original language. Delete other "language" columns to import languages in the exported Excel file.
- Identify each language using the language code in the first row (e.g., "en"). Do not delete or change the first 2 columns.

Process automation via Guides

Last Modified on 08.10.2024

Process automation via Guides

Some processes require a lot of steps by the user that have no deeper purpose other than navigating to the correct place in the application or entering the same information repeatedly.

To reduce the effort for your users, Userlane can now perform repetitive actions.

Managers can now automate individual and sequences of steps in Guides, making the process learning experience more efficient. Moreover, Guides can also be used to automate certain processes within your organization.

Why use it

Automation helps you achieve the following results:

1. **Efficient learning process:** With automation, you can eliminate the learning steps with no other role than navigating to the correct place in the application.
2. **Increased user productivity:** Help users spend less time on trivial tasks by automating parts of your processes (e.g., opening menus or filling out standard fields).
3. **Cost savings:** Automating certain parts of your processes allows users to focus on tasks that bring more value to your organization.

Examples

This functionality can be used in various scenarios:

- automate certain tasks where the Userlane performs all the actions.
    - For example, opening the right menu from where your user can create a new Opportunity or Support ticket.
- create Guides for various processes that will automatically fill out most of your form fields except the ones where your input is needed.
- use the automation feature to either teach users a process (delay and show the step to the user for visual guidance) or to automate certain redundant steps (accelerate steps for faster navigation).

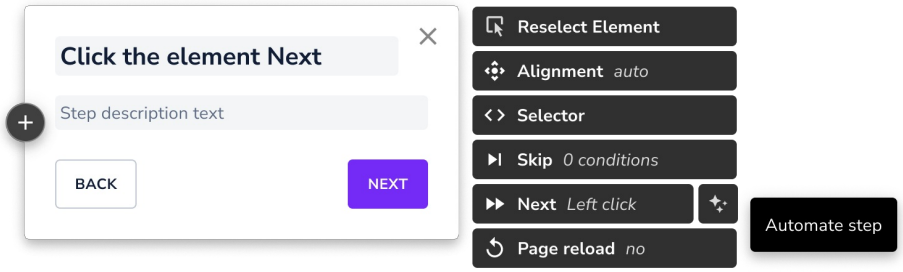
Use process automation via Guides with step input validation to reduce errors and increase data quality. To find out more about validation, check the following support article.

How to use Automation

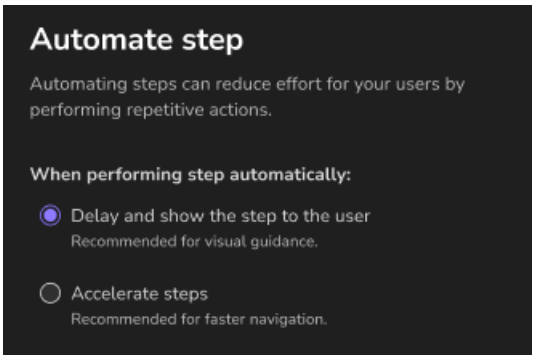
Step automation is supported in the following step types:

- Left click
- Specific value
- Right Click
- Double Click
- Left mouse button down

Once you visualize the step on your screen, look into the step settings section and click on the automate icon (located next to step type):



Once clicked, the following modal will be shown:



Here you can instruct Userlane how to perform the steps automatically:

- delay and show the step to the user - use this type for visual guidance. In that way, end users also understand what is happening in the background.
- accelerate steps - use it when you want to speed up the automation process. We recommend using it when you wish to open for the end user a group of steps (representing menus, dropdowns, popups, or modals) fast in the background.

Once automation is applied, you can see in the step settings that the automation icon is enabled. To disable automation, click again on the icon and then on the "clear automation" button.

Export a Guide as a PDF

Last Modified on 18.03.2025

Export Guides as PDFs

Not every user, content reviewer, or translator has access to your application or Userlane. To solve this problem, Managers can share existing Guides in their original app context by having them exported as PDF files.

Why use it

This feature will help you achieve the following results:

1. **Increased efficiency:** Provide visual context to your translators and content reviewers to avoid unnecessary feedback loops.
2. **Cost savings:** Export your Guides as PDFs to provide visual context to your translators and content reviewers. That way, you don't need to assign them any additional licenses to access the underlying application.
3. **Process documentation:** Some organizations must document processes for compliance reasons. Simply export a process as a PDF in Userlane, share it with your colleagues, and upload it to your knowledge base.
4. **Improved learning process:** Combine the learning process offered by Userlane with offline documentation that can be used on-site when onboarding new employees or analyzing processes.

Examples

This functionality can be used in various scenarios - check a few examples below:

- It's always great to reach out to your users in their native language. Support translators in understanding the context of the content they translate by sharing with them the Guide exported as a PDF.
- In some departments, you are required to document processes within your internal knowledge base tool. Export each process available in Userlane as a PDF in a few clicks.
- Some of your users or employees may prefer to use training materials offline (onboarding, on-site training, meeting with prospects, etc).

How to enable this feature

To receive access to this feature, please reach out to your Customer Success Manager.

Who can access this feature

Once enabled, you can take screenshots of steps only if you are an Admin or Moderator.

How to use this feature

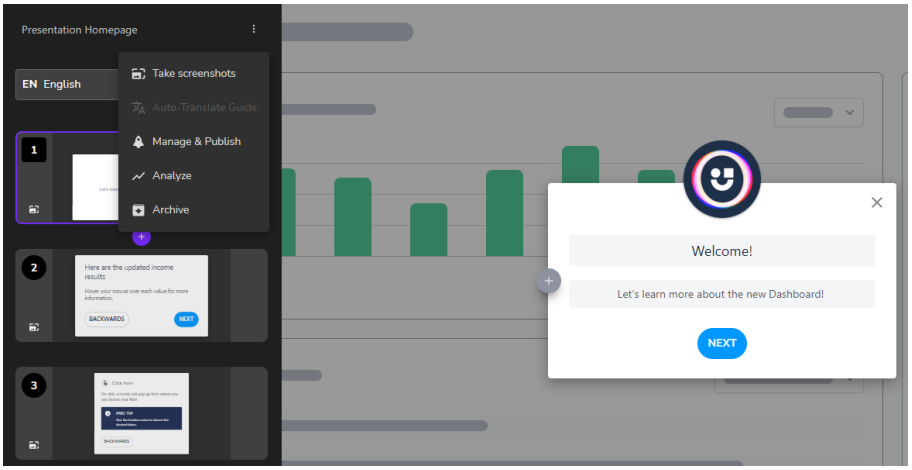
To export a Guide as a PDF, you must take screenshots of each step within the respective Guide.

How to take screenshots

You can take screenshots for the whole Guide or only for certain steps.

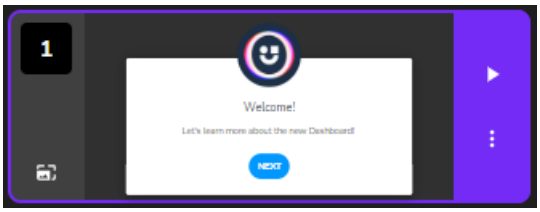
Guide level screenshots

Access the Guide from the Editor, click the corresponding Guide Options menu, and click the Take screenshots button.



A screenshot will be taken each time you navigate to a new step.

A small picture icon will be shown in the Editor panel for each step that contains a screenshot:

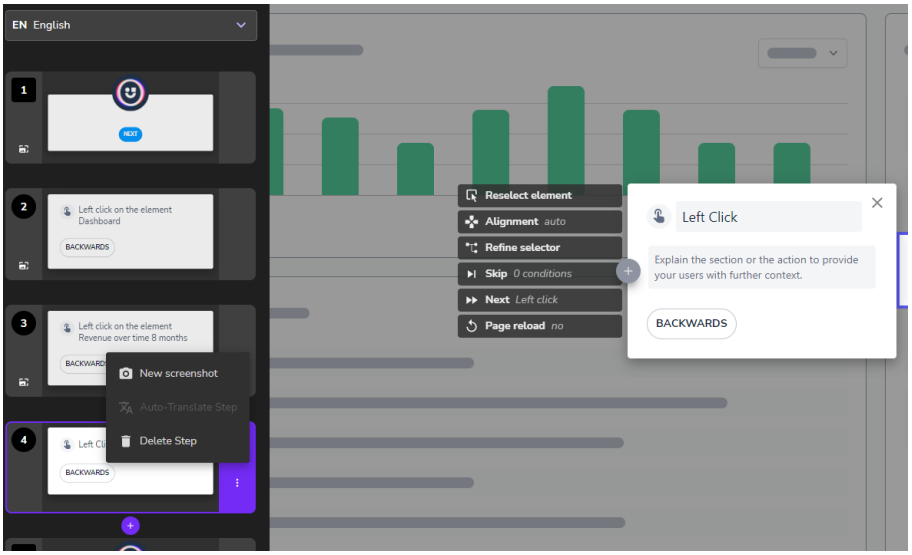


Step level screenshots

Sometimes you wish to take screenshots only of certain steps. That could happen in the following scenarios:

- you edited the Guide and wish to update the process in your knowledge base
- some steps contain Skip conditions
- you wish to replace the previously taken screenshot to emphasize the context of the underlying app better

To do that, access the Guide from the Editor, click on the corresponding Step Options menu, and then on New screenshot button.



⚠ After taking screenshots, click the Guide Save button. Otherwise, no screenshots will be saved, and the previous Screenshot version will be kept for the Guide export process.

Multi-language support

You can take different screenshots for each language available in Userlane. That way, you can provide the right visual context to your audience by connecting steps in English to the English version of the underlying app and German to the German version of the underlying app.

If a language does not contain any screenshots, Userlane will use the screenshots available for the default language.

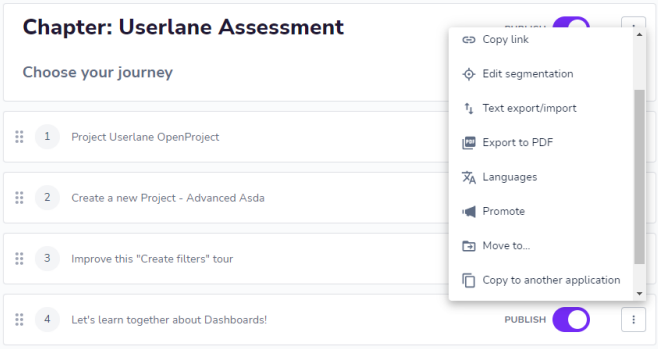
Example

Let's assume that your Guide is in English (default language), German, and French and that the underlying app supports only English and German.

- If you take screenshots only in the German version of the underlying app:
  - then both English and French versions of your Guide will use the screenshots corresponding to the German version of the underlying app.
- If you take screenshots in the English version of the underlying app:
  - the German language will continue to use the screenshots corresponding to the German version of the underlying app.
  - the English language will use the screenshots corresponding to the English version of the underlying app.
  - the French language will use the screenshots corresponding to the English version of the underlying app because English is the default language of your Userlane application.

How to export a Guide as a PDF

To export a Guide, access the Portal, open the Guides sections, and look for your Guide. Click on the Options menu and export the Guide as a PDF.



The Guide will be explored as a ZIP file containing multiple PDFs separated per language. Each PDF contains metadata information such as Property name, Language, Export Date, Account, and Guide link.

ℹ If a Guide step does not contain a screenshot, that step will still be part of the export. However, the visual context will be missing.

Example generated PDF with Userlane

Example PDF generated with Userlane: 21Aug_Create a Task in the underlying application_English.pdf.

Limitations

- The content located within iframes will not be shown in the screenshot.
- The content located within ShadowDOMs will not be shown in the screenshot.
- There is no auto-reload of Processes pages (Portal) - therefore, if the PDF Export process is in progress, you need to refresh the page to see status changes manually.
- If some pages are not properly shown in the screenshots, please contact our Support.
- The old PDF Exports can no longer be accessed from the Processes page (Portal). If old screenshots are available for the Guide, simply export that Guide as PDF again from the Portal to access the information from the Processes page.

Refine the selector

Last Modified on 12.12.2023

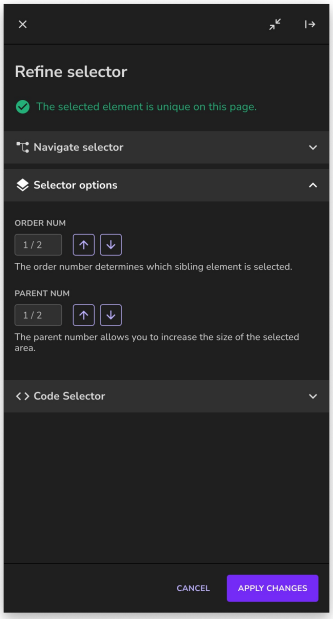
Why use it

Refine selector to configure element selection in Guides, Tooltips or Tags. By refining it, you can ensure it accurately finds the desired element. The features available in the "**Refine selector**" section provide the necessary flexibility to adapt and adjust element identification to the unique structure of your application.

Structure

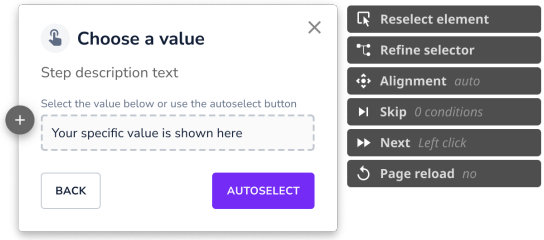
The "**Refine selector**" contains the following 4 sections:

- Element uniqueness
- Selector navigation (HTML tree)
- Additional selector options
- Code selector



Where to find it

For Guides, access a Step and click on Refine selector step option:

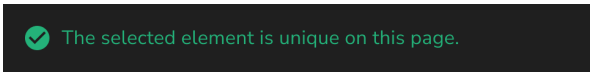


For Tooltips and Tags, click on the entry you wish to edit, open the Selected element section, and click Refine selector.

How to automatically adjust the code selector

Element uniqueness

Element uniqueness check informs you if multiple similar elements are on the web page. It provides additional information to the Managers that can be used when preparing Guides or creating and editing Tooltips or Tags.



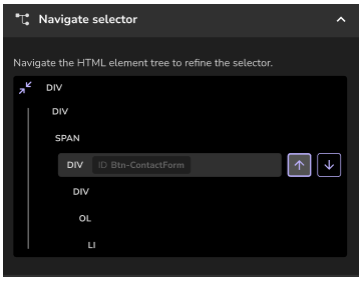
The check is done every time you edit the selector. Userlane takes the value assigned to theselector key, and looks throughout the webpage to see if any other similar elements can be found. A warning will be displayed if similar elements are found, telling you how many times that similar element was found.

> ℹ The element uniqueness check provides additional information to help the Manager make the right choice when preparing the content for their end users. We recommend using the Preview function and testing thoroughly the changes to ensure the selector of an element works within the flow design for end users.

If Userlane detects multiple similar elements, it does not mean the Guide, Tooltip, or Tag won't work correctly. For example, if the selector assigned to an element is found 3 times, Userlane will automatically add the OrderNum key (see below for more information) to the code selector to differentiate between the 3 similar elements.

Navigate selector

Navigate the HTML element tree to refine the selector - expand the tree view and adjust the selected element.

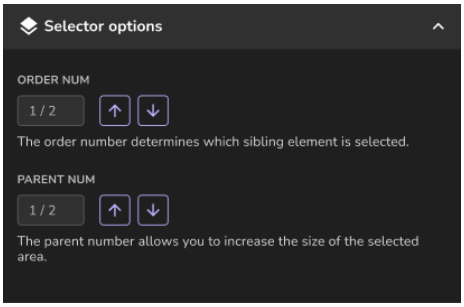


The impact of the changes is shown live to help Managers better understand if the new selector fits their needs.

Selector options

Two options are available here:

- Order Num: it determines which sibling element is selected.
- Parent Num: it allows you to increase or decrease the size of the selected area.



Code selector

The code selector allows you to fine-tune the selector. You also have the possibility to refine the selector further by adding the element's text to the selector. For more information, check the following article on refining the selector with the code selector.

FAQs

When are the changes applied?

You can see in the Editor mode the impact of your changes. Click on "Apply changes" to save the updated selector.

What is the difference between ParentNum and Element Tree?

Navigate selector is used to navigate to the top or bottom of the element tree, while Parent Num allows you to increase the size of the selected area. You can combine both by going down the element tree to select the smallest element and then applying Parent Num to go back to the element you wish to select. That way, Managers can increase a selected element's uniqueness.

Limitations

1. Navigate selector and Selector options sections will be disabled if the selector cannot be found on the page.

2. Navigate selector and Selector options sections will be disabled if subSelector key is found in the code selector. The subSelector key is added automatically by Userlane when recording elements inside iFrames or shadowDOMs.

3. The element uniqueness check focuses only on the selector key. It does not take into account other settings that can be added to refine the code selector. For more information, see: Refine element selection with the code

selector article.

4. The element uniqueness check looks through similar elements in the HTML tree. Meaning that it will not check for similar elements inside dropdowns or modals if those are not yet displayed in the HTML tree.

5. Order Num calculation does not take into account Parent Num. It searches for the siblings of the selected element by looking only at the selector key.

Tooltips

Last Modified on 21.04.2026

About Tooltips

Tooltips allow you to **explain** and **highlight** elements of the underlying application.

Using Tooltips, Managers can provide process-related information to users to help them complete certain processes or show them new features by grabbing their attention with the help of a pulsating icon.

Who can create a Tooltip?

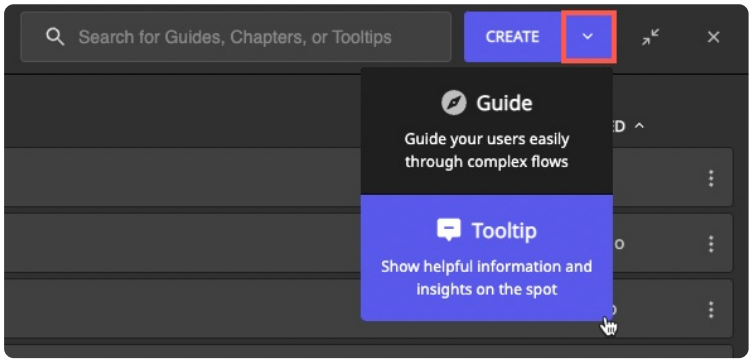
There is a single **Tooltip edit mode** to create, save, edit, and publish all in one view in the Editor.

Admins and **Moderators** can create, save, edit, and publish Tooltips in the Editor. **Contributors** can do almost everything, except that they cannot publish tooltips or edit or delete already live tooltips.

Record a Tooltip

To record a new Tooltip:

1. Select **Tooltip** from the **Create** dropdown in the Editor. If you are already on the Tooltip tab, you can click **Create**.



   The Editor is minimized in the bottom left of your screen.
2. Select the **target element** for the Tooltip, e.g., a button, input field, or menu. A description input box displays.
3. Type a helpful description of the element.

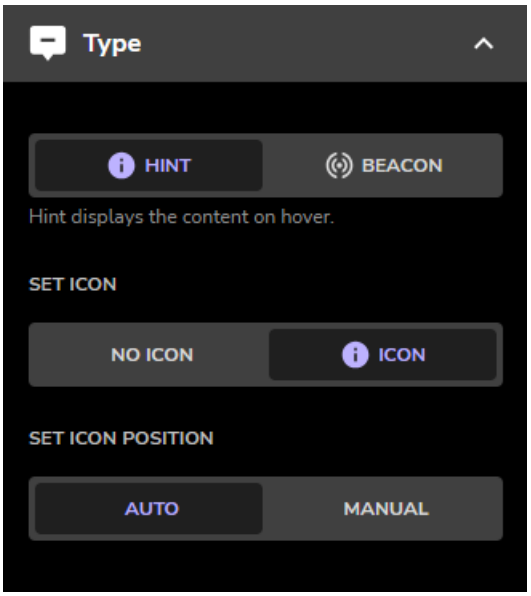


4. Define the **settings**. You can add choose the Tooltip **type,** can **reselect an element** if needed, **set a segment**, link it to a Guide, and choose the publishing **language**.

5. Save the **Tooltip**.

Tooltip Type

You can choose either Hint or Beacon as Tooltip type depending on your use case.



- **Hints** are used to display the content on hover. They can provide additional information to help users finalize a process or explain unknown words, features, or specific error messages.
- **Beacons** are animated icons that display the content on click and disappear after the interaction. They are used to draw the user's attention to a new feature or change in the underlying application, or they could be used as a call to action (e.g., to ask end users to report a bug in case an alert pops up).

ℹ The state of a beacon is stored in the web browser's local storage. If a user clicks on a beacon, that beacon will not be shown to him as long as the same web browser is used.

Set icon (only for Hint)

- You can choose whether the hint becomes visible only after the user hovers over the selected element or whether there is a help icon (i) next to the element that the user can hover over to make the hint text visible. You can set this up in Editor under the Icon tab:

Set icon position

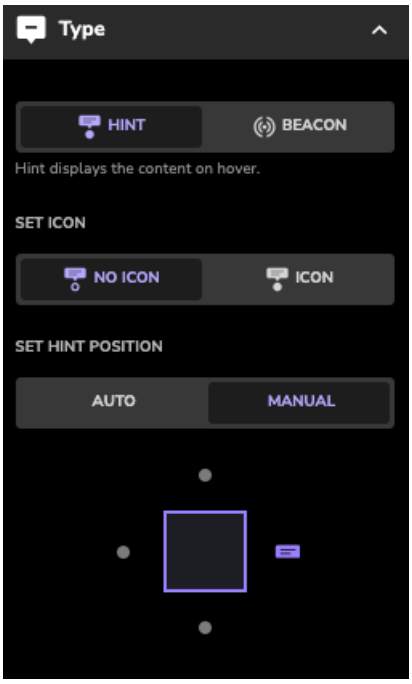
If you decide to use the help icon, you can position it in 2 modes:

- automatic (default): the icon's position is automatically determined by Userlane.
- manual: manually select the icon position from eight positions, including four internal ones (inside the element).

Set hint position (only for Hints without an icon)

For Hints without an icon you can also determine the position of the Hint itself. You can decide whether it

should appear above, below, or to the right or left of the selected element for your Hint.



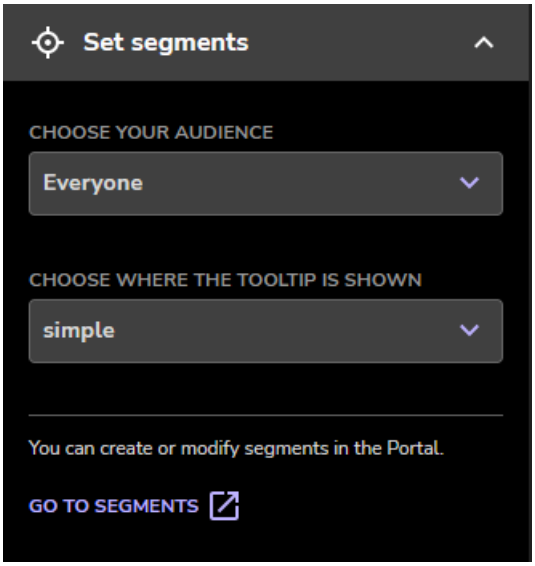
Icon color setting

- You can set the color of the hint and beacon icons to match your corporate identity or the individual app palette.
- The color setting of your icons can be adjusted in ***Customise > Design*** screen in the **Portal**.

Tooltip Segment

Page Segmentation and User Segmentation

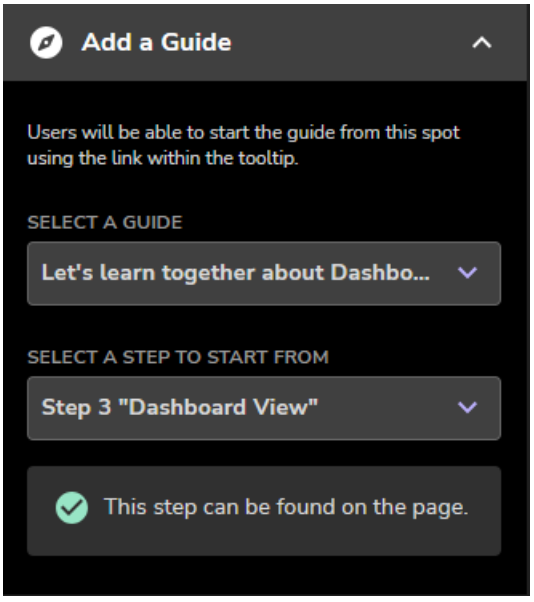
- Show the Tooltip only to the relevant group of users, e.g., based on user behaviour.
- Choose where the Tooltip will be shown with the help of page segments.



Note: Segmentation applied to Tooltips will not be active in the editor. The segmentation will be active in the end user view.

Add a Guide

Managers can link a Guide (from any step) to a Tooltip to help users learn the processes based on context and finalize them more confidently. Guides can be connected to either Hints or Beacons.



When a Tooltip is shown on the page, Userlane determines whether to show the linked Guide based on the following two criteria:

- the status of the Guide (published or unpublished)
- the segmentation of the Guide

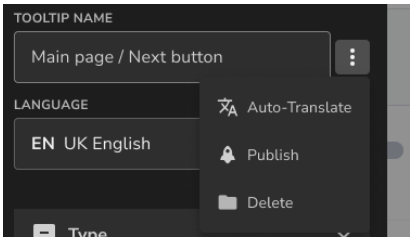
Translate a Tooltip

You can translate Tooltips within the Editor or outside Userlane.

Translating Tooltips within Userlane

You can translate Tooltips from the Editor automatically or manually.

One option to translate your content is to use the auto-translate functionality. To do that, open the more-menu section and click on Auto-Translate Tooltip.



Follow the instructions available in the Editor to translate your Tooltip's text from the source language to the selected target languages.

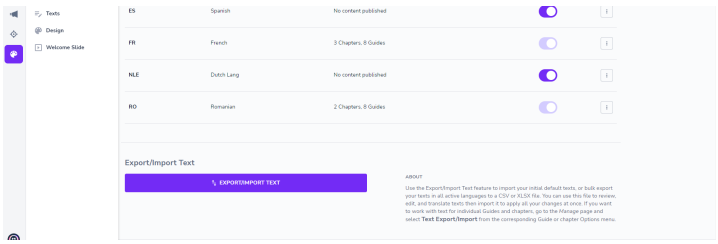
During the auto-translation process, you cannot edit the Tooltip's text. A notification will be displayed once the translation is finalized.

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>
> For additional questions, please don't hesitate to contact our Customer Success Team.

Translating Tooltips outside Userlane

Use the Export/Import Text feature to import your initial default texts or bulk export your texts in all active languages to a CSV or XLSX file. You can use this file to review, edit, and translate texts, then import it to apply all your changes at once.

To access it, go to Customize > Languages > Export/Import



When you click Export/Import, a modal describing the export and import processes will pop up.

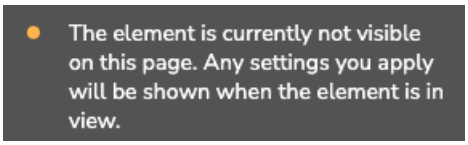
Language Management

Sign into Portal > Customize > Languages

- you can see if there are any Tooltips related to a language.
- Tooltips are part of the content that can be published or unpublished via one action under this tab.
- Tooltip content is removed if the corresponding language is deleted.

Element Status

A tooltip will show a notification with an orange dot in case the element is not visible on this page:



How to update and maintain Tooltips

In time, you will have dozens or hundreds of Tooltips published simultaneously. Userlane contains different features that help Managers easily find the Tooltip they wish to edit.

Tooltips naming

When you create a Tooltip, Userlane will grab all relevant information associated with the selected element and assign it to the Tooltip name.

Example: button 'Dashboard' Tooltip 16 Nov, 18:02

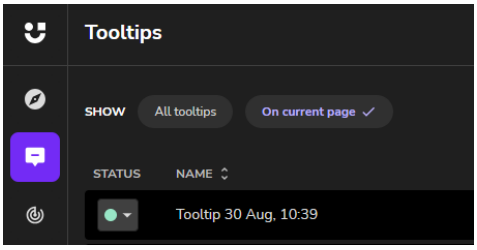
You can edit the Tooltip name anytime - we recommend doing that after you decide on a pattern you wish to follow with your team. For example, you could also add the page or process to the Tooltip name.

Tooltips search

Use the search functionality on the top of the Editor to find the Tooltip you wish to edit. Userlane filters the results by looking at the Tooltip name and text description.

Tooltips available on current page

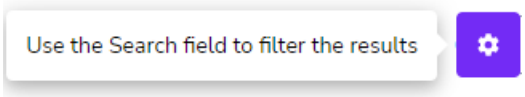
To find the Tooltip you wish to edit, you don't have to go through the entire list of Tooltips available in the Editor. You can click on "Show on current page" and Userlane will filter for you the Tooltips that can be found on that page.



Tooltips that are hidden behind a modal or dropdown won't be made available using this feature. For that, we recommend the method below, which also provides more contextual information to the editors.

Edit Tooltips on the spot

To find the Tooltip you wish to edit or improve, you need to see what your end-users see.



When the Editor is minimized or in the Preview mode, navigate the underlying application, find the Tooltip you wish to edit, hover over the textbox, and then click the settings button. Userlane will redirect you to the Tooltip you want to edit, allowing you to edit the Tooltip text and settings on the spot.

Troubleshooting tooltip positioning and layering

If a tooltip is hidden behind other UI elements, appears in an unexpected position, or is clipped at the screen edge, this is almost always caused by how your application's CSS handles layering — not a bug in Userlane. The sections below cover the most common cases.

Z-index conflicts

Every element on a web page has a stacking order controlled by the CSS z-index property. When your application assigns a very high z-index to a panel, modal, or navigation bar, Userlane tooltips can end up behind it and become invisible or unclickable.

Userlane tooltips render with a z-index of 1,000,000 by default — intentionally high to appear above most application UI. However, some enterprise frameworks (such as SAP Fiori or Salesforce Lightning) use z-index values at or above this threshold.

ℹ Userlane's maximum supported z-index is 1,000,000. If your application uses z-index values at or above this number, tooltips may not render above those elements.

To check the z-index of a conflicting element without developer tools experience:

1. Right-click the element that is covering your tooltip.
2. Select Inspect or Inspect Element from the context menu (available in Chrome, Firefox, Edge, and Safari).
3. In the panel that opens, look at the Styles or Computed tab.
4. Search for "z-index" in the styles list. A high number (e.g., 9999 or 100000) indicates the conflicting element.

Share this information with your developer team or Userlane support to resolve the conflict.

The appendToTarget fix

The most effective fix for z-index conflicts is the appendToTarget setting in the tooltip's selector configuration. This attaches the tooltip directly to the target element in the DOM rather than the standard Userlane overlay layer, so it inherits the same stacking context as the annotated element.

Open the selector settings for the affected tooltip and add the following to the JSON configuration:

```
{
 "appendToTarget": true
}
```

⚠ Note: The appendToTarget property requires access to the tooltip's advanced selector settings. If you are unsure where to find this, refer to the Adjust the selector article or contact Userlane support.

CSS anchoring and detached tooltips

A tooltip may appear to "detach" from its target — positioned somewhere unexpected, such as in a screen corner or far from the annotated element. This is most commonly caused by CSS properties that create a new stacking context or transform the coordinate system of a parent container, including:

- transform: translate(...) or any CSS transform on a parent element
- position: fixed on a parent container
- overflow: hidden on a scrollable parent
- will-change: transform applied for animation purposes

The recommended fix is to enable appendToTarget (described above). If that does not resolve it, a developer may need to remove or scope the transform or position: fixed on the parent container. Use the Inspect Element tool and look for transform or will-change properties on parent elements of your target to identify the cause.

Off-screen and clipped tooltips

If a tooltip is partially off-screen or clipped at the edge of a container, it is recommended to reposition it in the Editor: Open the tooltip in the Userlane Editor and manually set the position to the opposite side of the element (e.g., switch from "above" to "below") to move it away from the clipped edge.

ℹ Keep tooltip text concise to reduce the risk of off-screen behavior on smaller viewports. If longer explanations are needed, consider linking to a Guide instead.

Tags

Last Modified on 21.09.2025

About Tags

A Tag marks a single element that should be tracked to measure users' interaction with that element within the underlying application. For example, you can track interactions with buttons that indicate an important interaction, such as "Submit" or "Finish".

The tracking results are shown in the Portal under the Task Success page (button Tags). With Tags you can understand if users interact with important features of your application.

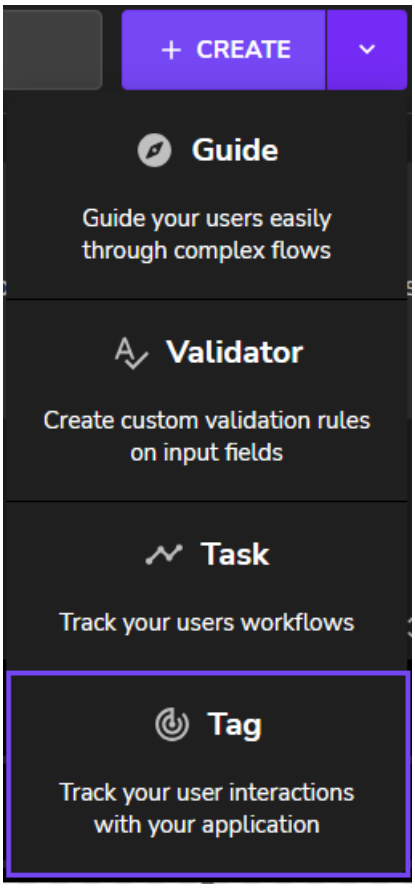
Who can create Tags?

Tags can be created and edited from the Editor. The new feature can be accessed by Admins and Moderators. Contributors do not have access to Tags-related actions in the Editor.

Create a Tag

To create a new Tag:

1. Select Tag from the Create dropdown in the Editor.



The Editor is minimized in the bottom left of your screen. You can press once CTRL to pause recording mode to find elements located in dropdowns or modules.

2. Select the target element for the Tag, e.g., a button or menu.

3. Define the Tag settings.

- Userlane will automatically assign a name to the Tag which includes details about the selected element. You can edit the Tag name.
- You can reselect an element or manually adjust the Code Selector.

4. To start tracking, first, save the Tag and then click Activate Tracking. You can also only save the Tag and later activate it either from the Tag or from the Tags view list.

⚠ To start tracking the tagged elements, you must have HEART enabled in Analytics settings. You will also be warned in Tags list view if the setting is not enabled.

Note: Segmentation applied to Tags will not be active in the Editor.

ℹ Check the following section to learn more about what needs to be considered when implementing Tags in your underlying application.

Test a Tag

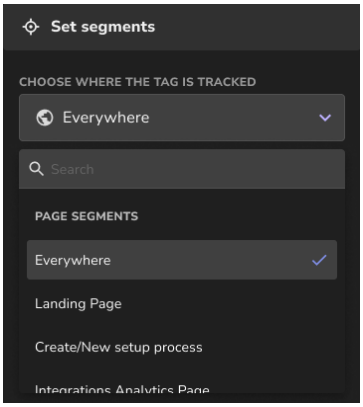
To test a Tag without having it activated first, follow these steps:

1. Click the Test Tag button.
2. Click on the target element.
3. Confirm if tracking information is sent to Analytics.
4. Result: A green popup appears in case of successful tracking confirmation. It confirms that tracking information is sent to Analytics.



Manage Page Segmentation

You can use page segments to show Tags only on a specific page or pages (URLs). To learn more about page segmentation, continue reading the following section.

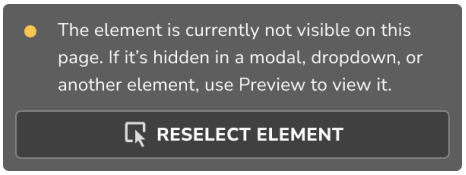


To manage page segments, click the **Manage page segments** link available in the Editor, and you will be redirected to the page segmentation management section in the Portal:

- there, you can see the existing page segments and their usage
- you cannot delete a page segment that is still being used by a Tag or any other content type

Element Status

A message will be shown in the Editor view in case the selected element is not visible in the current view.



How to update and maintain Tags

In time, you will have dozens or hundreds of Tags active. Userlane contains different features that help Managers easily find the Tags they wish to edit.

Tags naming

When you create a Tag, Userlane will grab all relevant information associated with the selected element and assign it to the Tag name.

Example: button 'Create' Tag 16 Nov, 17:02

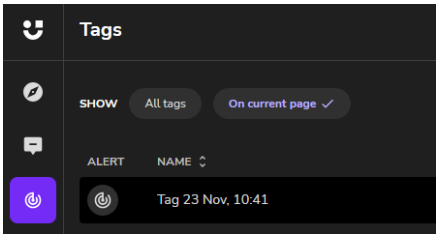
> You can edit the Tag name anytime - we recommend doing that after you decide on a pattern you wish to follow with your team. For example, you could also add the page or process to the Tag name.

Search in Editor

Use the search functionality on the top of the Editor to find the Tag you wish to edit. Userlane filters the results by looking at the Tag name.

Tooltips available on current page

To find the Tag you wish to edit, you don't have to go through the entire list of Tags available in the Editor. You can click on "On current page" and Userlane will filter for you the Tags that can be found on that page.



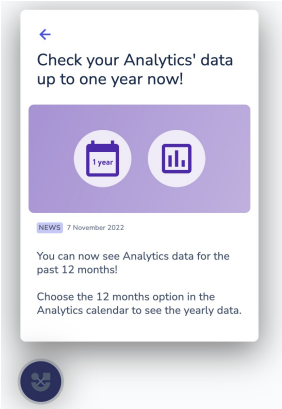
> Tags that are hidden behind a modal or dropdown won't be made available using this feature.

Create and activate Announcements

Last Modified on 21.05.2025

About Announcements

Announcements are powerful push messages delivered through the Userlane Assistant within your application. With Announcements, you can directly communicate with your users and involve your audience early on.



With Announcements you can

- Communicate anything you want to your users directly in your app
- Get insights on the actual users' needs, verify initial concept and goals
- Fill the gap within the content concept phase with relevant information and involve your audience at an early stage

When to use it

Before Rollout of Userlane:

- presenting and promoting Userlane as additional resource for support

After Rollout of Userlane:

- promoting specific Guides
- sharing resources, e.g. link to release notes, new URLs, best practice articles
- Share generic application-related information, e.g. downtime, responsible person shift, updates
- Share generic information, e.g. company news, reminder

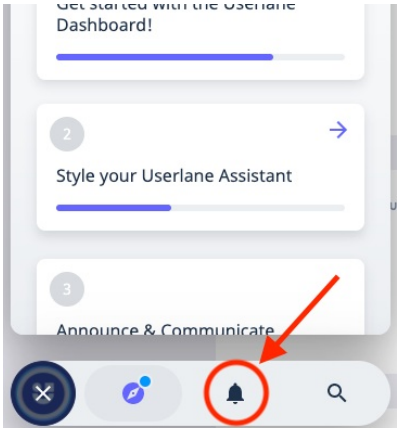
Who can create Announcements?

Admins and **Moderators** can create, save, edit and publish Announcements in the Userlane Portal. **Contributors** can do almost everything, except that they cannot publish the announcement.

Create an Announcement

- Go to your Userlane Portal. Navigate to **Messages > Announcements.**
- Follow the steps.
- Once you activate the Announcements for your end-users, the **Bell** icon appears in your Assistant. Through this bell, they will be able to reach the Announcement menu to find older announcements.

If you are not seeing the Announcement button within your Assistant, make sure to enable it in the Portal under Customize > Assistant.



Let's dive into the details

Announcement Status

- If you publish an Announcement, set it to private, and publish it again; it will only pop up for the users who didn't see it the first time.
- Once an Announcement pops up for a user it is considered as pushed. It won't pop up again for them.
- "Draft" refers to an Announcement that has never been published, while "used" refers to an Announcement, that was public once but not anymore.

Pushing more than one info at a time

- When a user is targeted for more than one Announcement for the first time they will see the last published Announcement first. Then they can click through the rest.
- Announcements vs. Promotions: Announcements and Promotions will never get mixed up. Announcements have a higher priority than Promotions.
- Announcements vs. Welcome Slide: the Welcome Slide is seen as an introduction element into the overall Userlane offering. When enabled, it will always be shown first when the user is targeted with any Userlane content (including Announcements) for the first time.

Adding and linking different content

- Images should be a maximum of 8 MB with a 4:2 ratio, and a recommended resolution of 326x160px. View more details on image requirements for your different content types in Working with images.
- If you link a Guide to an Announcement, we'll inherit that Guide's segment (yes you can also segment your Announcements!). However, you can change it.
- For users who can see the Announcement, but should not actually play through the linked Guide (e.g. not segmented for the user to see), we won't show the link button.

Pinning Announcements

You can **pin one Announcement** at a time to give it higher visibility in the Userlane Assistant. A pinned Announcement appears in a banner at the top of the Assistant in all menus, helping you draw more attention to important updates, reminders, or content.

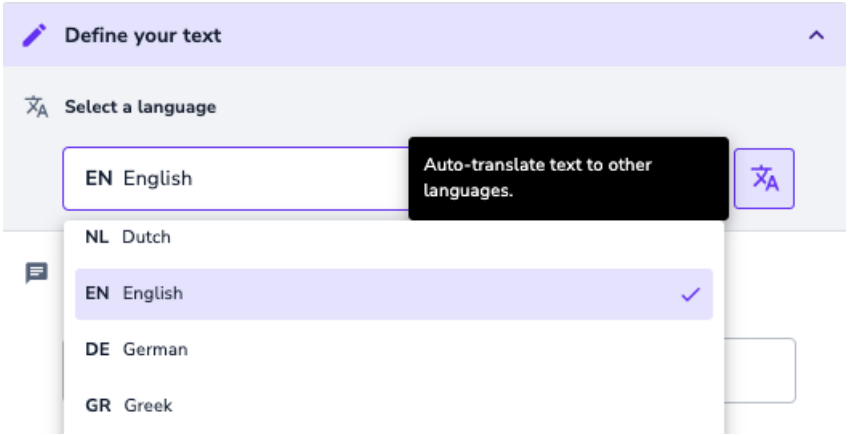
Pinning can be done in two ways:

- **During Announcement creation or editing**: In the Userlane Portal, while creating or editing an Announcement, simply select the pin option before publishing.
- **From the Announcements overview**: Navigate to the *Messages > Announcements* section in your Portal. In the table overview, click the three dot menu next to an Announcement to quickly and easily pin or unpin an Annoucement.

Note: Only one Announcement can be pinned at a time. If you pin a new one, it will automatically unpin the previously pinned Announcement.

Translating Announcements

The easiest and fastest way to translate your Announcements into your target languages is to use the auto-translate function located to the right of the language selection dropdown.



After clicking the auto-translate button, your texts will be automatically translated into the target languages you have added to your Userlane Portal under Customize > Languages. If any of the language codes are incorrect, texts for that language will not be translated and the Announcement will be blank.

Auto-translate is also available for NPS and Surveys!

After using auto-translate, you can then check the translations by selecting a language from the dropdown. If you need to send the translated texts to a local market for review, you can also export all texts on the Customize > Languages page.

If you prefer to manually translate your Announcements, you can do so by switching between languages in the Announcement creation form or by exporting the source text and then importing your translations.

ℹ When using the export/import option, make sure you don't delete or adjust any of your source text as these changes will also be imported.

Note that you can only publish an Announcement for a certain language after text has been added.

Considerations

Don’t activate too many Announcements in parallel for your users, especially not for the same page segment. The more Announcements you stack, the less your users will interact with them.

ℹ Important

- If there are no Guides shown to a User because of their Segmentation but there is an Announcement active, the User will still see the Assistant with empty Guide list but with the Announcement in the Announcement list.
- Even if the Announcement menu is deactivated, if you publish an Announcement it will be pushed to the desired user segment. This makes it very easy to test and communicate information.
- When updating an existing announcement, a user who has already seen the announcement before, will not see the pop-up again. The user can review “seen announcements” though and see the updated announcement there.

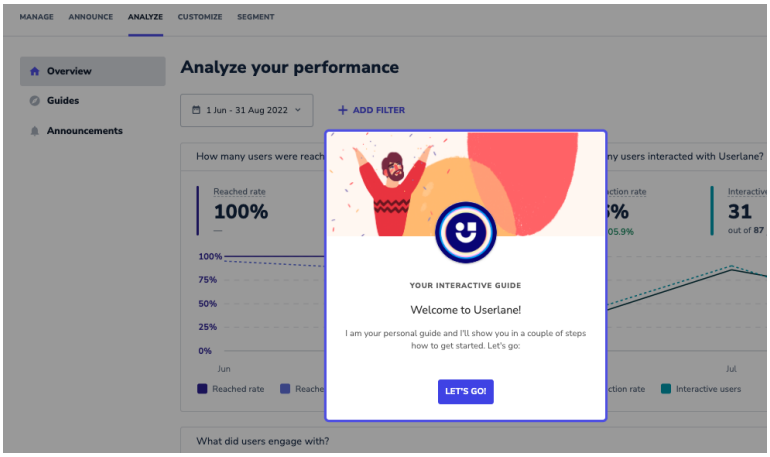
Welcome your users with the Welcome Slide

Last Modified on 12.01.2024

About the Welcome Slide

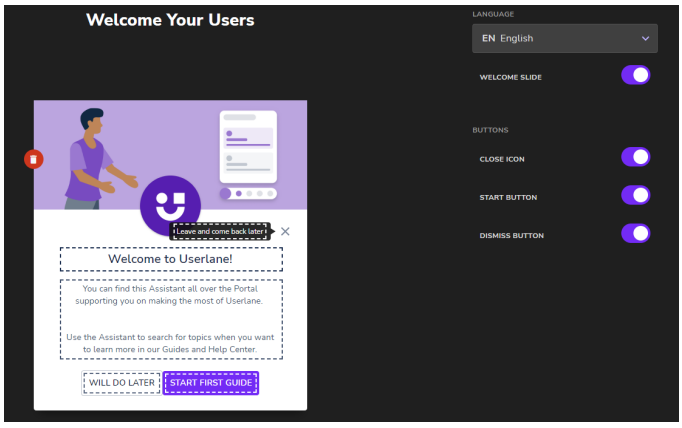
The Welcome Slide is a pop up grabbing your users' attention right from the start to promote your Guides and get them immediately started on them.

It will result in greying out the background and puts the focus on the pop up:



How to activate it

The Welcome Slide settings and the activation toggle is located in the *Customize - Welcome Slide* section of the Userlane Portal.



Elements of the Welcome Slide

The Welcome Slide can consist of the following elements:

- the avatar image
- a description
- an image

- a button to immediately start the first guide
- an option to close the welcome slide

The elements can be set or activated/ deactivated in the Welcome Slide settings.

How to use it

- To introduce your users to Userlane and raise awareness for the Assistant.
- To ensure the users immediately start with the guides.

Who sees the Welcome Slide

After the Welcome Slide is enabled, anyone who goes to the page where Userlane is running will see the Welcome Slide.

It will only pop up once per user (except for when cookies are not saved anymore).

 If the Welcome Slide is disabled and only enabled later, all users will see the Welcome Slide as it is the first time them seeing it.

 The Guide starting from the Welcome Slide will always be the first Guide available for that end-user in the Assistant.

Best Practices

- Tell your users what the Assistant button is and what benefit it offers. You could write that those tours will guide them through the platform. Users can access the tours at any time through the Assistant icon in the respective edge.
- We recommend adapting the wording and style of the Welcome Slide to your corporate identity. Your users will feel more attached to your style and can relate to you as a company providing the Guides.

Create and activate NPS

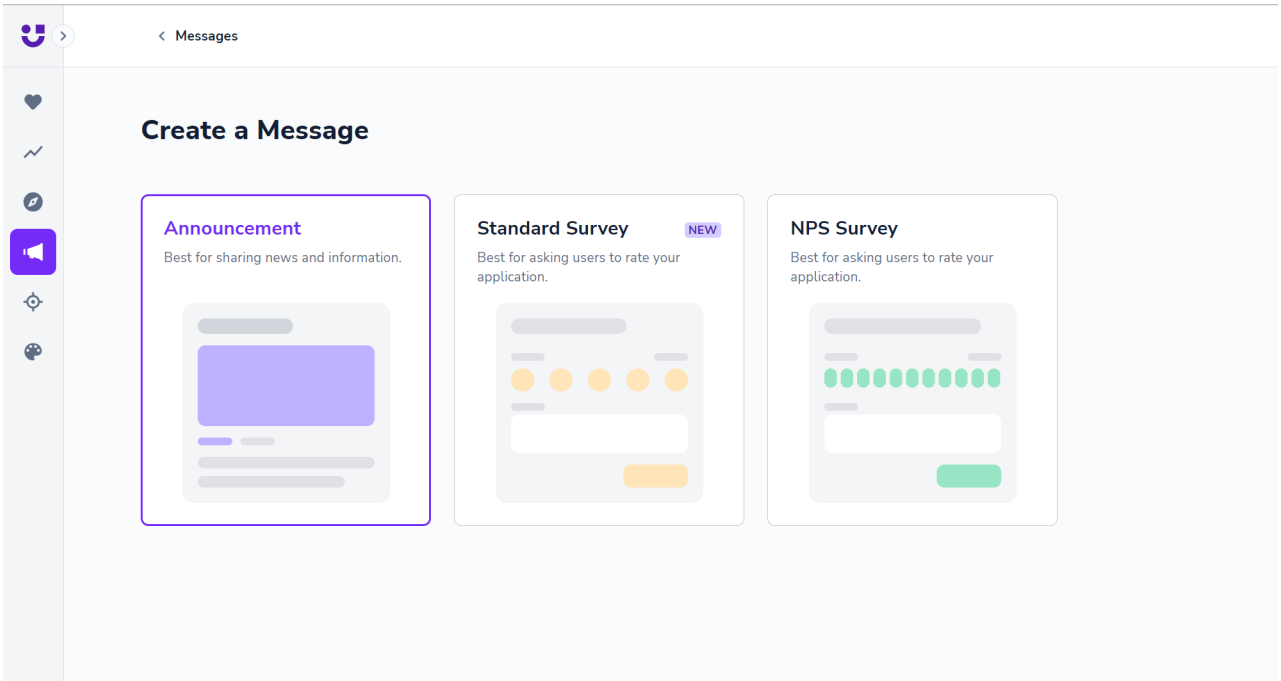
Last Modified on 04.03.2024

Why track the NPS with Userlane?

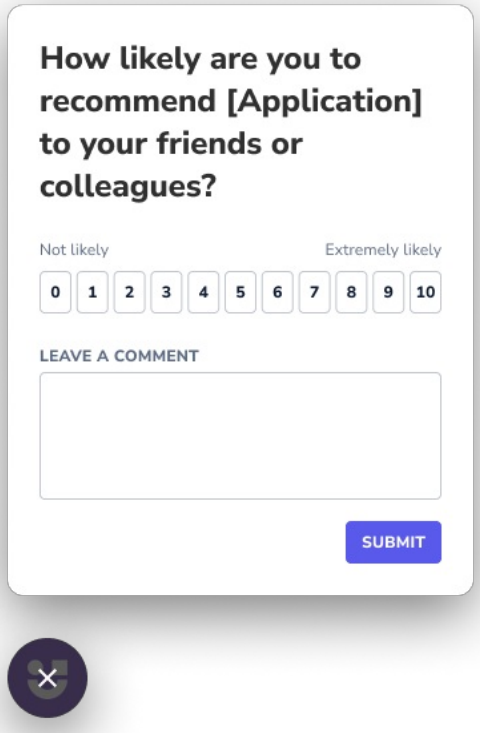
Userlane provides you with the tool to **set up** and **automate** your NPS. Asking the right user at the right time directly in the application provides higher response rates than e.g., doing so through email. With Userlane you can target a specific user group with the survey. We do all the calculations for you and are able to track the NPS over time, read users' comments and filter the results by user segment.

Setup

To create an NPS survey for your app, go to the Messages menu in the Portal and click on 'Create a Message', then choose the NPS option.



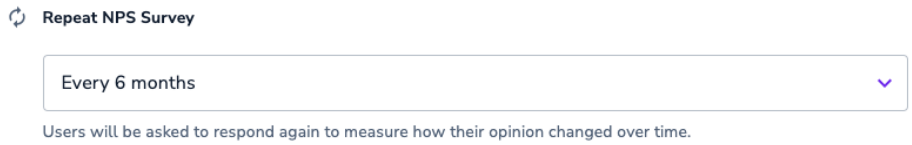
NPS survey behaves like an Announcement, it is displayed for the user automatically. Userlane collects and analyzes the results, which you can view in your Analytics.



Benefits

Easy, automated tool for collecting users' opinions in predefined cycles

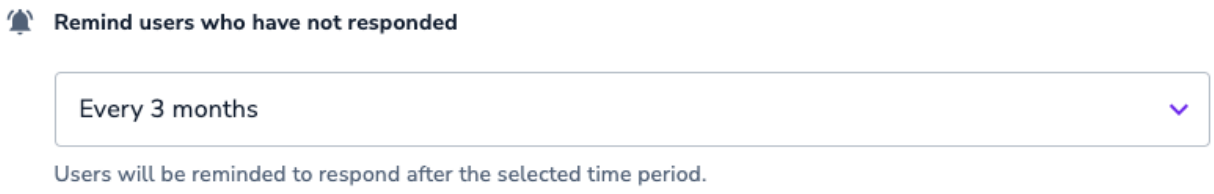
With Userlane, you activate a single NPS survey which is displayed in predefined cycles. The NPS survey is hidden from users once they respond to it. These users will be targeted automatically again in the new cycle.



ℹ NPS will run in cycles until you deactivate it or until the end date is reached.

Automatic reminders for users that have not responded

NPS will remain in the Announcement list in the Userlane Assistant if a user did not respond yet. You can set up a reminder with desired frequency to nudge these users, so the NPS pop-up is displayed for them again.



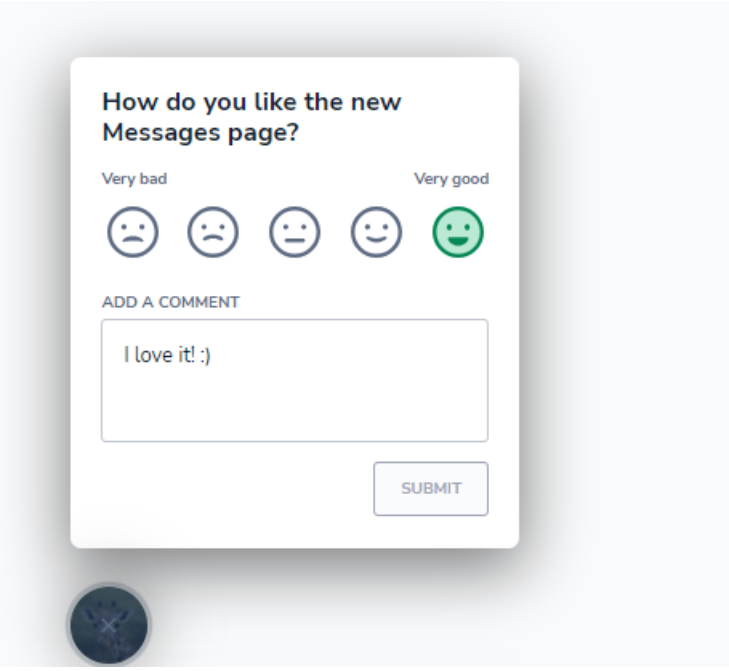
Create and activate Surveys

Last Modified on 24.09.2025

About Surveys

Understanding how well users adopt your application is at the core of Userlane's mission, and the ability to measure user satisfaction plays a key role in this.

This tool allows you to ask any question and publish multiple surveys simultaneously across different pages and user segments within your application.

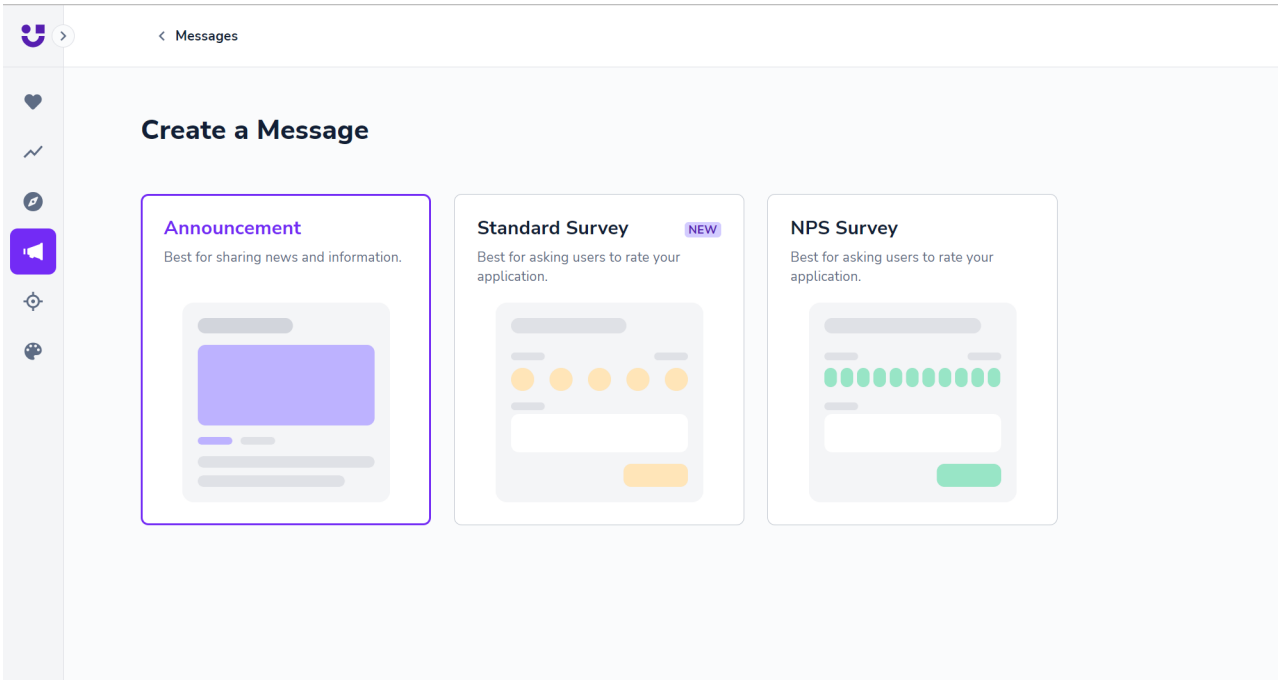


With the emoji-based scale, survey participants can easily provide feedback by selecting one of 5 emojis representing different sentiments. The leftmost emoji corresponds to the lowest rating, and the rightmost to the highest. This user-friendly, easy to use system allows for quick responses, encouraging engagement and a high participation rate.

Setup

Overall, the process is similar to setting up an NPS Survey or an Announcement.

To create a new Survey for your app, go to the Messages page in the Portal and click on 'Create a message', then choose the Standard Survey option.

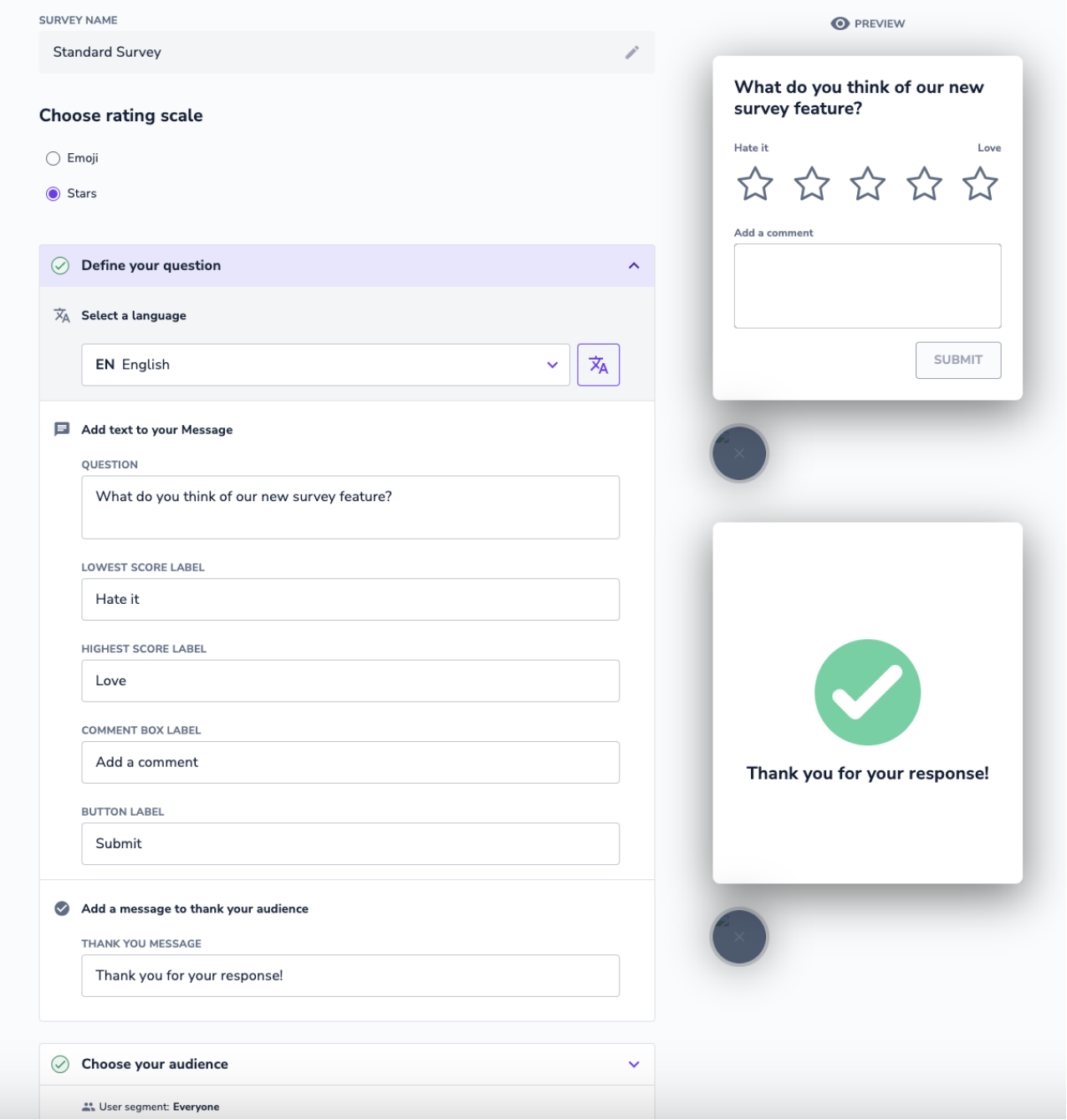


First, you can decide between an Emoji and Star rating scale, depending on your needs.

Then enter your question and the score labels, as well as the ‘Thank you’ message for your users.

You can translate the Survey into other languages by switching the Language.

You can decide who should participate in the Survey by setting up a dedicated User Segment. If you want to display it on specific pages only, select a Page Segment. You can also specify the activation date of the Survey and how often you want to send reminders to users who haven't responded to it yet.



Remind Users & Repeat Surveys

In the 'Schedule your survey' section you can choose to remind users who have not yet responded to the survey with a certain frequency. By default, users will be reminded about Surveys every 3 days.

You can also schedule Surveys to repeat at certain intervals. This is a great way to automatically collect responses on the same questions over time and check for similarities and differences. By default Surveys are not set to repeat but you can select a repeat frequency from the dropdown.


Remind users who have not responded
Every 3 days
Users will be reminded to respond after the selected time period.
Repeat Survey
Do not repeat
Users will be asked to respond again to measure how their opinion changed over time.

Supported language codes for Content Auto-Translation

Last Modified on 07.10.2025

The auto-translation feature available in Userlane supports the following IETF BCP 47 language tags:

Code	Language	Code	Language	Code	Language
af	Afrikaans	en-sz	English	mn-mn	Mongolian
af-na	Afrikaans	en-tz	English	ne	Nepali (macrolanguage)
af-za	Afrikaans	en-tk	English	ne-in	Nepali (macrolanguage)
ak	Akan	en-to	English	ne-np	Nepali (macrolanguage)
ak-gh	Akan	en-tt	English	nd	North Ndebele
sq	Albanian	en-tc	English	nd-zw	North Ndebele
sq-al	Albanian	en-tv	English	se	Northern Sami
sq-xk	Albanian	en-um	English	se-fi	Northern Sami
sq-mk	Albanian	en-vi	English	se-no	Northern Sami
am	Amharic	en-ug	English	se-se	Northern Sami
am-et	Amharic	en-gb	English	no	Norwegian
ar	Arabic	en-us	English	no-no	Norwegian
ar-dz	Arabic	en-vu	English	nb	Norwegian Bokmål
ar-bh	Arabic	en-zm	English	nb-no	Norwegian Bokmål
ar-td	Arabic	en-zw	English	nb-sj	Norwegian Bokmål
ar-km	Arabic	eo	Esperanto	nn	Norwegian Nynorsk
ar-dj	Arabic	et	Estonian	nn-no	Norwegian Nynorsk

ar-eg	Arabic	et-ee	Estonian	or	Oriya (macrolanguage)
ar-er	Arabic	ee	Ewe	or-in	Oriya (macrolanguage)
ar-iq	Arabic	ee-gh	Ewe	om	Oromo
ar-il	Arabic	ee-tg	Ewe	om-et	Oromo
ar-jo	Arabic	fo	Faroese	om-ke	Oromo
ar-kw	Arabic	fo-fo	Faroese	os	Ossetian
ar-lb	Arabic	fi	Finnish	os-ge	Ossetian
ar-ly	Arabic	fi-fi	Finnish	os-ru	Ossetian
ar-mr	Arabic	fr	French	ps	Pushto
ar-ma	Arabic	fr-dz	French	ps-af	Pushto
ar-om	Arabic	fr-be	French	fa	Persian
ar-ps	Arabic	fr-bj	French	fa-af	Persian
ar-qa	Arabic	fr-bf	French	fa-ir	Persian
ar-sa	Arabic	fr-bi	French	pl	Polish
ar-so	Arabic	fr-cm	French	pl-pl	Polish
ar-ss	Arabic	fr-ca	French	pt	Portuguese
ar-sd	Arabic	fr-cf	French	pt-ao	Portuguese
ar-sy	Arabic	fr-td	French	pt-br	Portuguese
ar-tn	Arabic	fr-km	French	pt-cv	Portuguese
ar-ae	Arabic	fr-cg	French	pt-gw	Portuguese
ar-eh	Arabic	fr-cd	French	pt-mo	Portuguese
ar-ye	Arabic	fr-ci	French	pt-mz	Portuguese
hy	Armenian	fr-dj	French	pt-pt	Portuguese
hy-am	Armenian	fr-gq	French	pt-st	Portuguese
as	Assamese	fr-fr	French	pt-tl	Portuguese
as-in	Assamese	fr-gf	French	pa	Panjabi
az	Azerbaijani	fr-pf	French	pa-arab	Panjabi
az-az	Azerbaijani	fr-ga	French	pa-guru	Panjabi
az-cyrl	Azerbaijani	fr-gp	French	pa-in	Panjabi
az-latn	Azerbaijani	fr-gn	French	pa-pk	Panjabi
bm	Bambara	fr-ht	French	qu	Quechua
bm-latn	Bambara	fr-lu	French	qu-bo	Quechua
eu	Basque	fr-mg	French	qu-ec	Quechua
eu-es	Basque	fr-ml	French	qu-pe	Quechua
be	Belarusian	fr-mq	French	ro	Romanian
be-by	Belarusian	fr-mr	French	ro-md	Romanian
bn	Bengali	fr-mu	French	ro-ro	Romanian
bn-bd	Bengali	fr-yt	French	rm	Romansh
bn-in	Bengali	fr-mc	French	rm-ch	Romansh
bs	Bosnian	fr-ma	French	rn	Rundi
bs-ba	Bosnian	fr-nc	French	rn-bi	Rundi
bs-cyrl	Bosnian	fr-ne	French	ru	Russian
bs-latn	Bosnian	fr-re	French	ru-by	Russian

br	Breton	fr-rw	French	ru-kz	Russian
br-fr	Breton	fr-sn	French	ru-kg	Russian
bg	Bulgarian	fr-sc	French	ru-md	Russian
bg-bg	Bulgarian	fr-bl	French	ru-ru	Russian
my	Burmese	fr-mf	French	ru-ua	Russian
my-mm	Burmese	fr-pm	French	sg	Sango
ca	Catalan	fr-ch	French	sg-cf	Sango
ca-ad	Catalan	fr-sy	French	gd	Scottish Gaelic
ca-fr	Catalan	fr-tg	French	gd-gb	Scottish Gaelic
ca-it	Catalan	fr-tn	French	sr	Serbian
ca-es	Catalan	fr-vu	French	sr-ba	Serbian
zh	Chinese	fr-wf	French	sr-cyrl	Serbian
zh-cn	Chinese	ff	Fulah	sr-xk	Serbian
zh-hk	Chinese	ff-cm	Fulah	sr-latn	Serbian
zh-mo	Chinese	ff-gn	Fulah	sr-me	Serbian
zh-hans	Chinese	ff-mr	Fulah	sr-rs	Serbian
zh-sg	Chinese	ff-sn	Fulah	sh	Serbo-Croatian
zh-tw	Chinese	gl	Galician	sh-ba	Serbo-Croatian
zh-hant	Chinese	gl-es	Galician	sn	Shona
kw	Cornish	lg	Ganda	sn-zw	Shona
kw-gb	Cornish	lg-ug	Ganda	ii	Sichuan Yi
hr	Croatian	ka	Georgian	ii-cn	Sichuan Yi
hr-ba	Croatian	ka-ge	Georgian	si	Sinhala
hr-hr	Croatian	de	German	si-lk	Sinhala
cs	Czech	de-at	German	sk	Slovak
cs-cz	Czech	de-be	German	sk-sk	Slovak
da	Danish	de-de	German	sl	Slovenian
da-dk	Danish	de-li	German	sl-si	Slovenian
da-gl	Danish	de-lu	German	so	Somali
nl	Dutch	de-ch	German	so-dj	Somali
nl-aw	Dutch	el	Modern Greek (1453-)	so-et	Somali
nl-be	Dutch	el-cy	Modern Greek (1453-)	so-ke	Somali
nl-bq	Dutch	el-gr	Modern Greek (1453-)	so-so	Somali
nl-cw	Dutch	gu	Gujarati	es	Spanish
nl-nl	Dutch	gu-in	Gujarati	es-ar	Spanish
nl-sx	Dutch	ha	Hausa	es-bo	Spanish
nl-sr	Dutch	ha-gh	Hausa	es-ic	Spanish
dz	Dzongkha	ha-latn	Hausa	es-ea	Spanish
dz-bt	Dzongkha	ha-ne	Hausa	es-cl	Spanish
en	English	ha-ng	Hausa	es-co	Spanish
en-as	English	he	Hebrew	es-cr	Spanish
en-ai	English	he-il	Hebrew	es-cu	Spanish
en-ag	English	hi	Hindi	es-do	Spanish
en-au	English	hi-in	Hindi	es-ec	Spanish

en-bs	English	hu	Hungarian	es-sv	Spanish
en-bb	English	hu-hu	Hungarian	es-gq	Spanish
en-be	English	is	Icelandic	es-gt	Spanish
en-bz	English	is-is	Icelandic	es-hn	Spanish
en-bm	English	ig	Igbo	es-mx	Spanish
en-bw	English	ig-ng	Igbo	es-ni	Spanish
en-io	English	id	Indonesian	es-pa	Spanish
en-vg	English	id-id	Indonesian	es-py	Spanish
en-cm	English	ga	Irish	es-pe	Spanish
en-ca	English	ga-ie	Irish	es-ph	Spanish
en-ky	English	it	Italian	es-pr	Spanish
en-cx	English	it-it	Italian	es-es	Spanish
en-cc	English	it-sm	Italian	es-us	Spanish
en-ck	English	it-ch	Italian	es-uy	Spanish
en-dg	English	ja	Japanese	es-ve	Spanish
en-dm	English	ja-jp	Japanese	sw	Swahili (macrolanguage)
en-er	English	kl	Kalaallisut	sw-ke	Swahili (macrolanguage)
en-fk	English	kl-gl	Kalaallisut	sw-tz	Swahili (macrolanguage)
en-fj	English	kn	Kannada	sw-ug	Swahili (macrolanguage)
en-gm	English	kn-in	Kannada	sv	Swedish
en-gh	English	ks	Kashmiri	sv-ax	Swedish
en-gi	English	ks-arab	Kashmiri	sv-fi	Swedish
en-gd	English	ks-in	Kashmiri	sv-se	Swedish
en-gu	English	kk	Kazakh	tl	Tagalog
en-gg	English	kk-cyrl	Kazakh	tl-ph	Tagalog
en-gy	English	kk-kz	Kazakh	ta	Tamil
en-hk	English	km	Central Khmer	ta-in	Tamil
en-in	English	km-kh	Central Khmer	ta-my	Tamil
en-ie	English	ki	Kikuyu	ta-sg	Tamil
en-im	English	ki-ke	Kikuyu	ta-lk	Tamil
en-jm	English	rw	Kinyarwanda	te	Telugu
en-je	English	rw-rw	Kinyarwanda	te-in	Telugu
en-ke	English	ko	Korean	th	Thai
en-ki	English	ko-kp	Korean	th-th	Thai
en-ls	English	ko-kr	Korean	bo	Tibetan
en-lr	English	ky	Kirghiz	bo-cn	Tibetan
en-mo	English	ky-cyrl	Kirghiz	bo-in	Tibetan

en-mg	English	ky-kg	Kirghiz	ti	Tigrinya
en-mw	English	lo	Lao	ti-er	Tigrinya
en-my	English	lo-la	Lao	ti-et	Tigrinya
en-mt	English	lv	Latvian	to	Tonga (Tonga Islands)
en-mh	English	lv-lv	Latvian	to-to	Tonga (Tonga Islands)
en-mu	English	ln	Lingala	tr	Turkish
en-fm	English	ln-ao	Lingala	tr-cy	Turkish
en-ms	English	ln-cf	Lingala	tr-tr	Turkish
en-na	English	ln-cg	Lingala	uk	Ukrainian
en-nr	English	ln-cd	Lingala	uk-ua	Ukrainian
en-nz	English	lt	Lithuanian	ur	Urdu
en-ng	English	lt-lt	Lithuanian	ur-in	Urdu
en-nu	English	lu	Luba-Katanga	ur-pk	Urdu
en-nf	English	lu-cd	Luba-Katanga	ug	Uighur
en-mp	English	lb	Luxembourgish	ug-arab	Uighur
en-pk	English	lb-lu	Luxembourgish	ug-cn	Uighur
en-pw	English	mk	Macedonian	uz	Uzbek
en-pg	English	mk-mk	Macedonian	uz-af	Uzbek
en-ph	English	mg	Malagasy	uz-arab	Uzbek
en-pn	English	mg-mg	Malagasy	uz-cyrl	Uzbek
en-pr	English	ms	Malay (macrolanguage)	uz-latn	Uzbek
en-rw	English	ms-bn	Malay (macrolanguage)	uz-uz	Uzbek
en-ws	English	ms-latn	Malay (macrolanguage)	vi	Vietnamese
en-sc	English	ms-my	Malay (macrolanguage)	vi-vn	Vietnamese
en-sl	English	ms-sg	Malay (macrolanguage)	cy	Welsh
en-sg	English	ml	Malayalam	cy-gb	Welsh
en-sx	English	ml-in	Malayalam	fy	Western Frisian
en-sb	English	mt	Maltese	fy-nl	Western Frisian
en-za	English	mt-mt	Maltese	yi	Yiddish
en-ss	English	gv	Manx	yo	Yoruba
en-sh	English	gv-im	Manx	yo-bj	Yoruba
en-kn	English	mr	Marathi	yo-ng	Yoruba
en-lc	English	mr-in	Marathi	zu	Zulu
en-vc	English	mn	Mongolian	zu-za	Zulu
en-sd	English	mn-cyrl	Mongolian		

Note: If your language is unavailable on the list, let us know by reaching out to your Customer Value Manager.

Validators

Last Modified on 17.04.2025

Validators: Create Custom Validation Rules

Introduction

Validators is a new feature that allows you to create custom validation rules for form fields within your target applications. This empowers you to ensure that users enter data in the correct format, improving data quality and streamlining workflows. This document will guide you through creating and using Validators.

What are Validators?

Validators are a new content type within the Userlane Editor. They allow Managers to define rules that specify the format of data that users should enter into form fields. These rules are based on regular expressions (regex), a powerful tool for pattern matching.

Key Features and Benefits:

- **Custom Validation:** Create rules tailored to your specific data requirements.
- **Improved Data Quality:** Ensure users enter data in the correct format, reducing errors and inconsistencies.
- **Simplified Guidance:** Provide users with clear, concise prompts on how to fill out form fields.
- **Enhanced User Experience:** Give users immediate feedback on whether their input is valid, helping them correct mistakes in real-time.
- **GenAI Powered:** Leverage the power of generative AI to help create regular expressions.

How to Create a Validator

Validators are created simply and quickly in the Userlane Editor:

1. Create a New Validator: Choose the "Create Validator" option from the Userlane Editor to start the Validator recording mode.
2. Select a Form Field: In the Validator recording mode, navigate to the form field in your target application that you want to validate and select it with your cursor.
3. Define the Validation Rule:

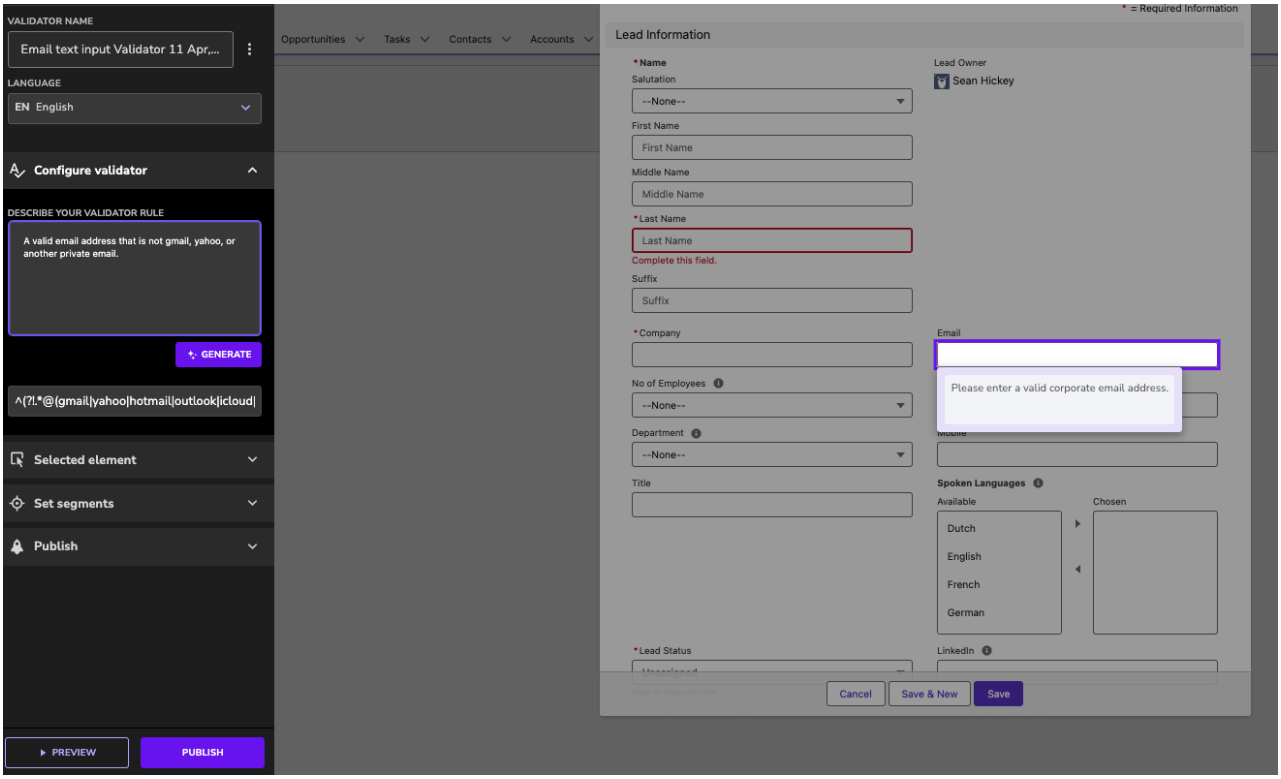
- Use GenAI (Recommended): Describe the desired data format in natural language, and be as precise as possible (e.g., "a 10-digit phone number," "an email address ending in @mycompany.com"). Our platform's AI will generate the corresponding regular expression. You can then review and edit the

generated regex.

- Enter Regular Expression Manually: If you are familiar with regular expressions, you can enter the rule directly.

4. Write an Input Prompt: Provide a short, helpful message that will be displayed to the user when they focus on the form field. This message should explain the expected data format (e.g., "Enter a valid email address").

5. Save and Publish: Save your Validator. Once published, the Validator will be active for end-users.



End-User Experience

When a user interacts with a form field that has a Validator applied, they will experience the following:

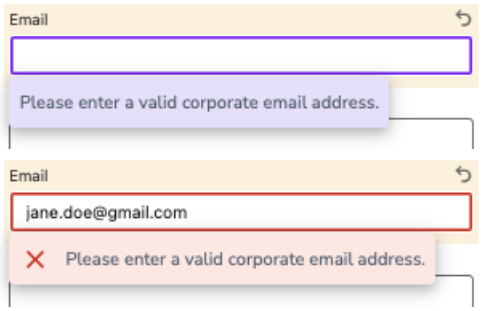
1. Input Prompt: When the user focuses on the form field, the text you created will be displayed, providing guidance on the expected input.

2. Real-time Validation: Once the user moves on from the form field, the Validator checks their input against the defined rule.

3. Visual Feedback:

- Valid Input: If the user's input matches the rule, the form field will be framed in green, indicating that the data is valid.

- Invalid Input: If the user's input does not match the rule, the form field will be framed in red, indicating that the data is invalid.



Best Practices

- Keep Input Prompts Clear and Concise: Provide specific instructions in your input prompts to help users understand the expected format.
- Test Your Validators Thoroughly: Before publishing, test your Validators with various inputs to ensure they function as expected.
- Use GenAI as a Starting Point: Even if you are familiar with regular expressions, using the AI to generate a starting point can save time and effort.
- Provide examples: In the hint message, provide a valid example of the expected input.

Frequently Asked Questions

Q: Can I use Validators on any type of form field?

A: Validators can be used on most common form field types, including text fields, number fields, and email fields - as long as they are <textarea> or <input> HTML elements.

Q: Can a single Validator be used on multiple elements on a page?

A: No. Validators are designed to work on a one-to-one basis with form fields. This is because the selector used to apply a Validator targets a specific, single element within the application.

Q: Can I edit a Validator after it has been published?

A: Yes, you can edit a Validator at any time.

Q: How do I write a regular expression?

A: Regular expressions can be complex, but our GenAI feature can generate them for you. There are also many online resources and tutorials available to help you learn more about regular expressions.

Troubleshooting

If you encounter any issues with Validators, please contact our support team for assistance.

How to work with SubSelectors

Last Modified on 17.09.2025

Subselectors help you make your element targeting **more precise**. They're useful when a simple selector (like a button or label) is not unique enough, and you want to anchor it more reliably inside a container.

When to use a subSelector

- When the **same label or text appears multiple times** on a page.
- When the **main element is too broad** (e.g., a big container or an iframe).
- When you need to **anchor an element inside another element** (like a label inside a form).
- When **no page segmentation** is possible you can base the selector on a unique text on the page (for Tooltips, Tags or Validators).

Step-by-step instructions

We are guiding you through an example on how to write the subSelector.

1. Launch the Userlane Editor for the page you're working on.
2. Select the bigger which includes both elements and anchor it with element text by clicking Add Element Text (like 'Willkommen bei Wikipedia'). Change "contains" to "matches" if a certain appears multiple times.

Input A:



3. Copy the selector that was generated for this big element (you'll need it soon).
4. Click Cancel to exit that selection.
5. Click on Reselect Element
6. Select the label or smaller element you want and again anchor it with its text (like 'Kunst und Kultur' by clicking Add Element Text . Change "contains" to "matches" if a certain appears multiple times.

Input B:



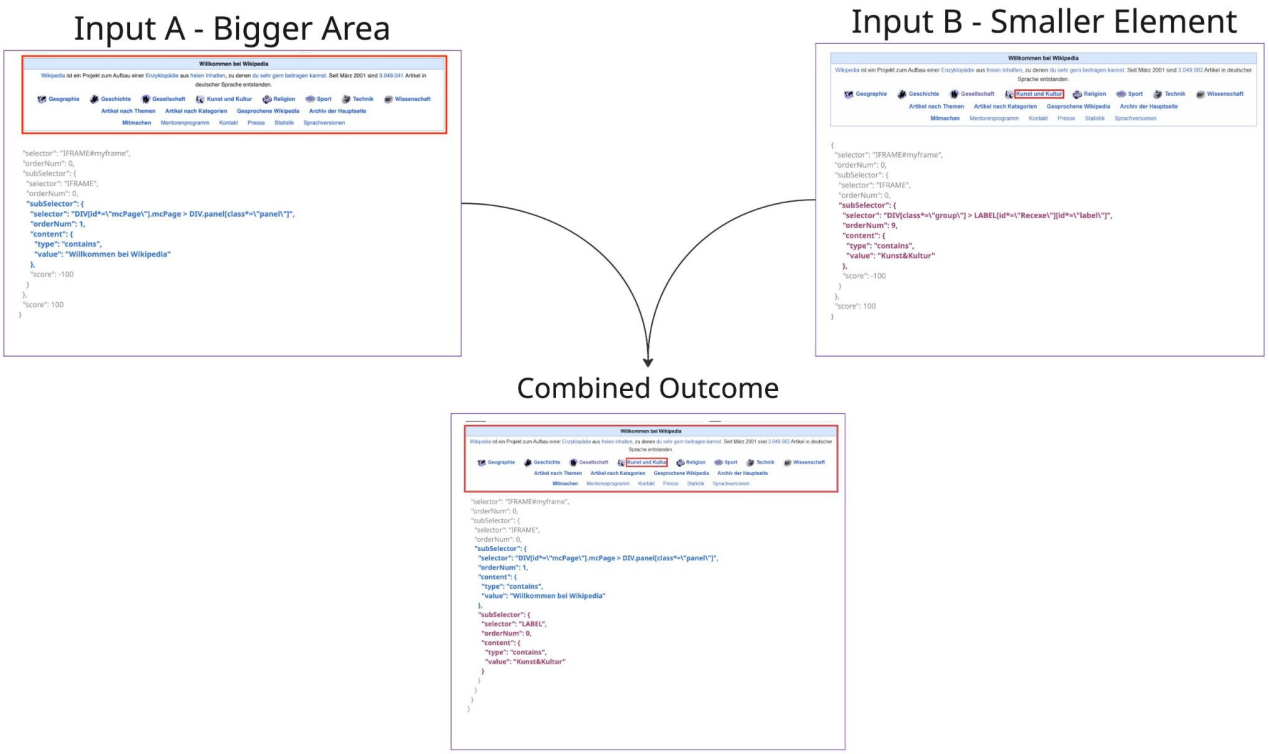
7. Copy the 1st selector you had from the big element before this

8. Keep just one selector as the main anchor (IFRAME#myframe) and add the second selector as a subSelector (make sure writing is correct)

9. Simplify the Selector:
   Trim it to the essentials: keep just the label or a specific DIV with a concrete, stable ID. Remove anything extra (long ancestor chains, unrelated classes, headings, etc.).
   If your selector shows “score” bits, remove them.

10. Check brackets and punctuation
    Make sure every (has a), every [has a], and quotes are paired. If the Syntax is correct, Apply Changes can be clicked.

Click on the image for a bigger version of our example:



Best practices

Contains vs Matches

- **Contains** → looks for part of the text
- **Matches** → looks for an exact text match
- If wording appears multiple times, use **Matches**.

Selector hygiene

- Copy–paste text from the UI to avoid typos.
- Remove unnecessary “heaviness” (long paths or unrelated divs).
- Prefer unique attributes like **IDs**. The Editor is going to display if an element is unique.
- Always test in the actual page state before finalizing.

Common pitfalls

- Forgetting to switch to **Matches** when there are duplicates.
- Extra spaces or hidden line breaks breaking the match.
- Leaving in long, fragile paths instead of simplifying to the stable part.
- Missing or unbalanced brackets.

Tasks

Last Modified on 29.12.2025

Overview

Tasks are a new content type in the Userlane Editor designed to power the Task Success analytics page in the Userlane Portal. Unlike Guides or Announcements, Tasks have no end user–facing UI. Once created, saved, and activated, a Task works silently in the background, collecting data about key user interactions (called Actions) and sending this data to Userlane HEART analytics.

This allows enterprises to gain visibility into how their employees engage with business-critical processes; helping leaders ensure ROI on software investments and drive higher productivity across the organization.

Why Tasks Matter

For enterprises, simply knowing that employees have access to software is not enough. The real question is:

- Are employees actually completing the critical workflows that drive business value?
- Where do they get stuck, and how much time do these processes take?

Tasks provide the answer. By defining multi-step workflows and automatically measuring completion and time-to-completion, Tasks give enterprises a new layer of visibility into digital adoption.

Business value for enterprises

- Measure adoption of 3rd-party software: Track whether employees complete the key workflows the software was purchased for.
- Identify friction points: See where users drop off and which steps block success.
- Quantify ROI: Link real adoption and task success data to your software spend.
- Optimize productivity: Ensure employees can complete their tasks effectively, improving business outcomes.

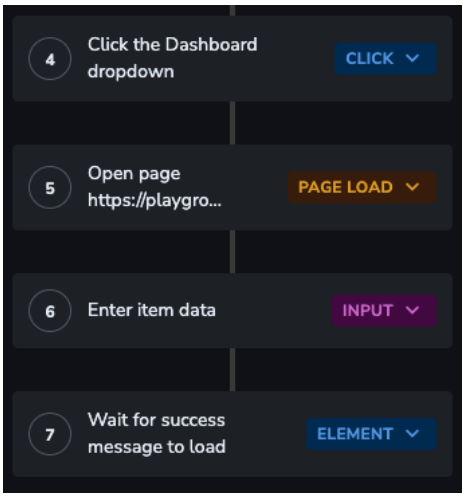
How Tasks Work

A Task is made up of at least two Actions (required so we can calculate completion rates and times). You can add as many Actions as needed to represent the real-world flow you want to measure.

There are four types of Actions available:

- Click Action: Tracks when a user performs a left click on a selected UI element.
- Input Action: Tracks when a user focuses on an input field. (The data entered is not collected, only the fact that text was entered.)
- Page Action: Tracks when a user arrives at a specified URL. You can configure URLs with wildcards for dynamic parameters (e.g., family.userlane.com/app/*/analytics/content/overview).

- Element Action: Tracks when a selected UI element loads in the application.



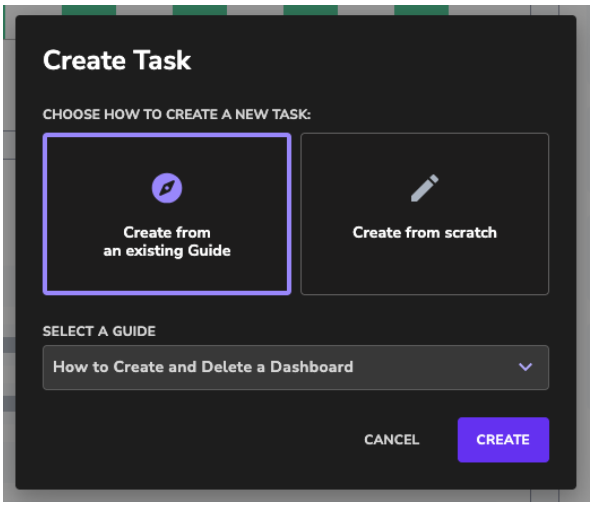
Note: Click, Input, and Element Actions are recorded by selecting UI elements during recording. Page Load Actions are configured directly in the Editor Panel.

Creating a Task

There are two ways to create a Task in your application using the Userlane Editor.

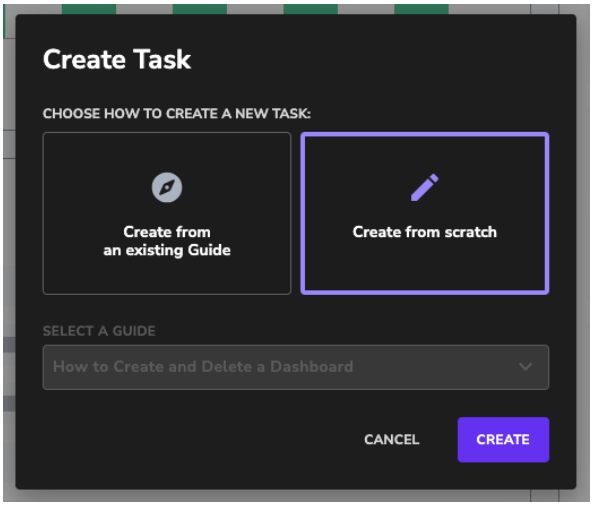
1. Create a Task from an existing Guide

1. In the Userlane Editor, click Create Task
2. In the modal, select Create from an existing Guide.
3. In the dropdown, select the Guide you want to create a Task from.
4. Userlane automatically creates Task Actions from Guide Steps.
5. Review and adjust the Actions as needed.
6. Save and activate the Task.



2. Create a Task from Scratch

1. In the Userlane Editor, click Create → Task.
2. Enter recording mode.
3. Record at least two Actions by selecting elements or configuring Pages.
4. Review the Actions in the Editor Panel.
5. Save and activate the Task.



Where Task Data Appears

Once activated, your Task continuously collects Action data. This data is sent directly into HEART analytics, powering the Task Success page in the Userlane Portal.

From here, you can see:

- Task completion rates
- Time to completion
- Drop-off points

These insights allow enterprise leaders to monitor adoption, evaluate efficiency, and make data-driven decisions about their digital workplace tools.

FAQs

Do end users see Tasks?
No. Tasks run entirely in the background and have no UI components.

Why do Tasks require at least two Actions?
With only one Action, we cannot calculate important metrics like completion rate or completion time. Two or more Actions ensure the data is meaningful.

Can I still use Tags?

Tags remain available but are best suited for single interactions. For multi-step workflows, Tasks should be used.

Contextual Actions

Last Modified on 08.06.2026

Contextual Actions let you automatically deliver Userlane content (Guides, Tooltips, Validators, and Messages) to your end users based on what's happening in the application at that moment. Instead of relying on users to open the assistant, you can proactively surface the right help at the right time.

How it works

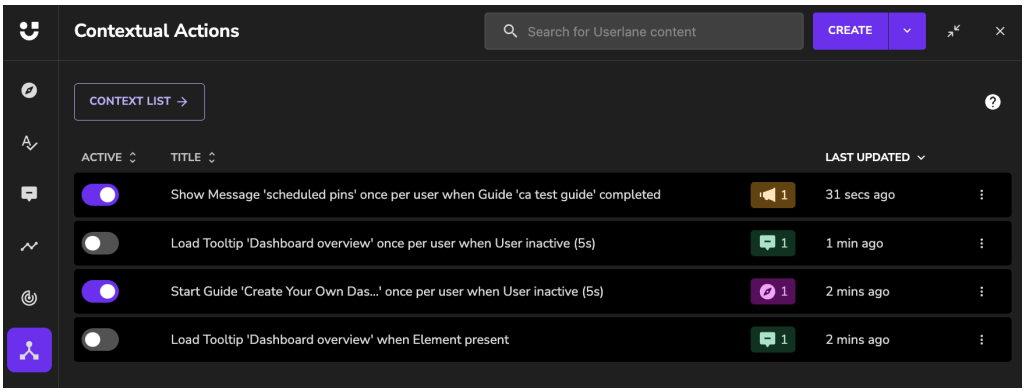
A Contextual Action is a rule made up of two parts:

1. **Contexts:** the conditions that must be true (e.g. a specific element appears on the page, or a user has been inactive for 30 seconds)
2. **Actions:** what happens when those conditions are met (e.g. start a Guide, show a Message, or load a Tooltip)

When you publish a Contextual Action, Userlane continuously evaluates your conditions. The moment they're satisfied, your chosen content is delivered to the end user, with no manual intervention required.

For full details on each part, see the dedicated pages:

- **Contexts:** how to define conditions
- **Actions:** how to configure what content is delivered and how



Creating a Contextual Action

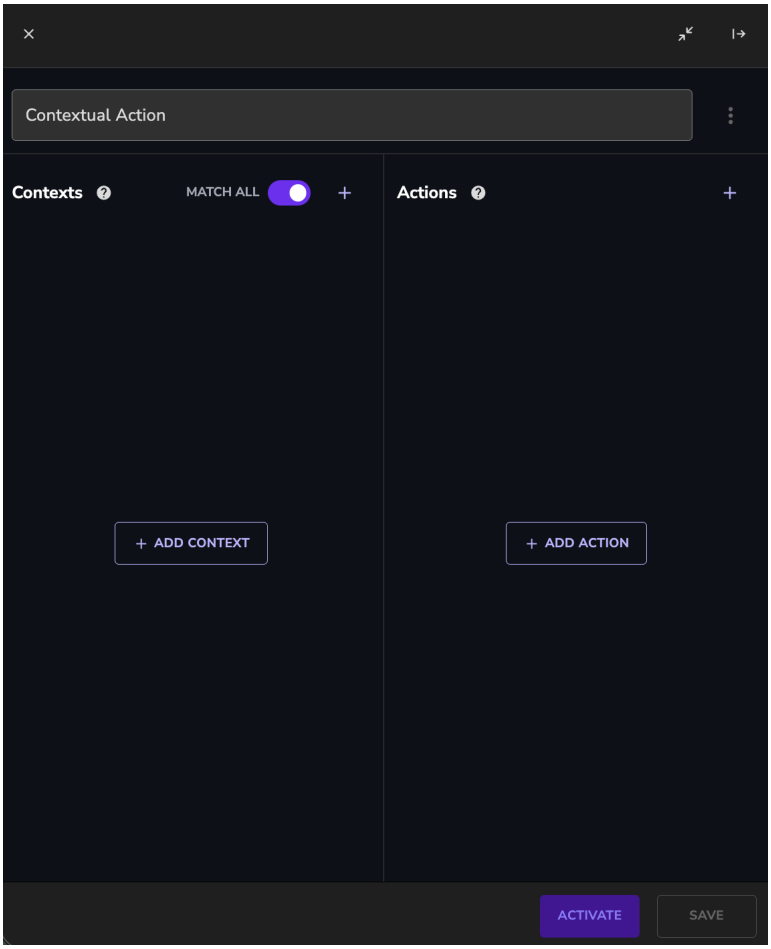
To create a new Contextual Action:

1. Navigate to the **Contextual Actions** section in the Userlane Editor.
2. Click **Create new**.
3. Add one or more **Contexts** (your conditions).

4. Add one or more **Actions** (what content to deliver).

5. Click **Publish** to make it active, or **Save** to keep it as a draft.

A Contextual Action must have at least one Action before it can be published. Unpublished Contextual Actions are saved as drafts and will not affect end users.



Automatic naming

The editor automatically generates a clear, human-readable name for each Contextual Action that summarizes what the rule does. The name is composed of two parts:

1. **Action part:** describing what will happen (e.g. *Show Tooltip 'Welcome'*, *Start Guide 'Onboarding' from step 3*, *Hide Message 'Promo'*)

2. **Condition part:** (optional), describing when it should happen (e.g. *when Guide 'Checkout' is completed*, *when User is inactive (5m)*, *when Element 'Submit' is visible*)

When a Contextual Action has multiple actions or multiple conditions, the extras are summarized as *+ N more action(s)* or *+ N more condition(s)* so the name stays scannable. Frequency settings like *once per user* are appended where relevant.

The name updates live as you adjust the rule. Pick a different content item, change an operator, or add a condition, and the name reflects the change immediately.

If a referenced Guide, Tooltip, Validator, or Message has been deleted, the name shows *[deleted]* in its place so the rule remains identifiable. An empty Contextual Action with no actions or conditions falls back to the default label *Contextual Action*.

Publishing and editing

- **Draft vs. published: A Contextual Action does not become active until you publish it. You can save drafts at any time.**
- **Editing a published Contextual Action:** You can edit a published Contextual Action, but your changes only take effect after you click **Publish** again.
- **When changes take effect:** Updated Contextual Actions take effect on the next page load. If an end user is in an active session, they'll continue on the version that was loaded at the start of their session.

How Userlane evaluates Contextual Actions

Understanding how Userlane handles Contextual Actions helps you design effective rules.

Guide priority

Guides take priority over all other content types. If a Guide is currently playing, no other Contextual Actions will trigger until the Guide finishes or is dismissed.

Multiple Contextual Actions triggering at the same time

If multiple Contextual Actions have conditions that are all true at the same moment, the first one fires immediately and the rest are queued. The queue order follows the order in the Actions view, which you can adjust using drag and drop.

Inactive user detection

Time-based conditions (like user inactivity) do not fire while the browser tab is hidden. If the inactivity timer elapses while the tab is in the background, the Contextual Action triggers immediately when the user returns to the tab.

State persistence

The player remembers whether a Contextual Action has been shown or dismissed using your browser's local storage. This means the state does not persist across different browsers or devices, and is cleared if the user clears their browser data.

Example use cases

Here are some common ways to use Contextual Actions:

Help a struggling user. Set a User context to detect 30 seconds of inactivity, then show a Message offering assistance or start a Guide walking them through the next steps.

Chain content together. Use a Content context to check if a user has completed a specific Guide, then show a congratulatory Message or load a follow-up Tooltip on a related feature.

React to the UI state. Use an Element context to detect when a specific element appears on the page (such as an error banner) and automatically start a Guide that walks the user through resolving the issue.

Suppress irrelevant content. Use a Hide action to prevent a Tooltip from appearing when a user has already completed an app action, reducing noise for experienced users.

Guide users based on previous selections. Combine multiple Contexts with Match All (AND) logic to create precise conditions. For example, only start a Guide when the user is on a specific URL *and* a particular element is present on the page.

Tips and best practices

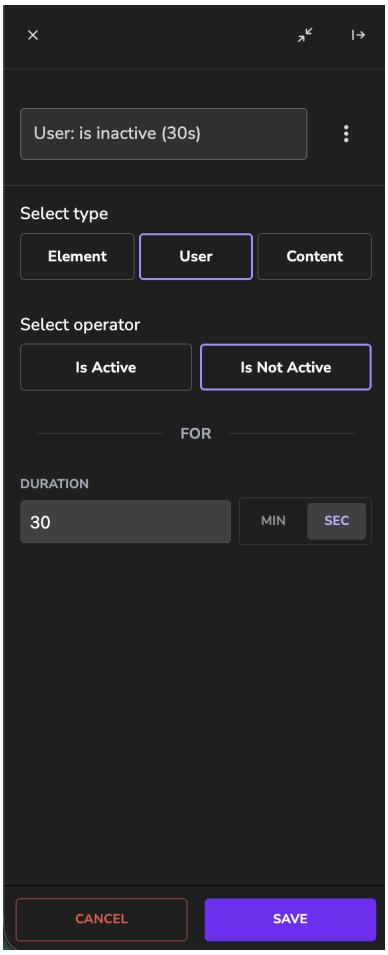
- **Start simple.** Begin with a single Context and a single Action. You can always add more conditions later as you learn what works
- **Be mindful of Guide exclusivity.** Since Guides block all other Contextual Actions from triggering, make sure your Guide conditions are specific enough to avoid unexpectedly suppressing other content.
- **Check for conflicting rules.** If multiple Contextual Actions target the same context, review the queue order to ensure the most important content fires first.

Contexts

Last Modified on 08.06.2026

A Context is a single condition that checks something about the current state of the application or the user. Contexts are the "if" part of a Contextual Action, defining when your content should be delivered.

Each Context is built from three parts: a type, an operator, and a status value. Together, these form a readable rule. For example: If element is present, or If content is completed.



Context types

Element

Checks the presence or state of a specific UI element in the underlying application. You identify the element using a CSS selector.

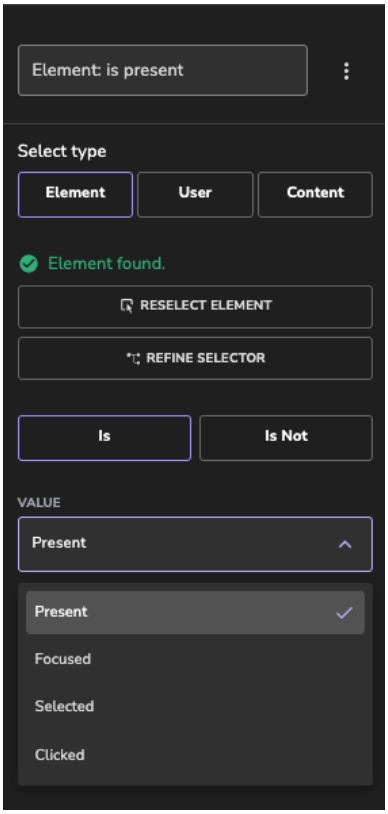
Available statuses:

Status	Meaning
Present	The element is visible or available on the page

Clicked	The user has clicked the element
Selected	The element (e.g. a checkbox or dropdown option) is selected
Focused	The element currently has keyboard or input focus

Each status also supports the is not operator. For example, If element is not present triggers when the element disappears from the page.

Use this when you want to react to something appearing on the page, a button being clicked, a checkbox being selected, or an input field receiving focus.



User

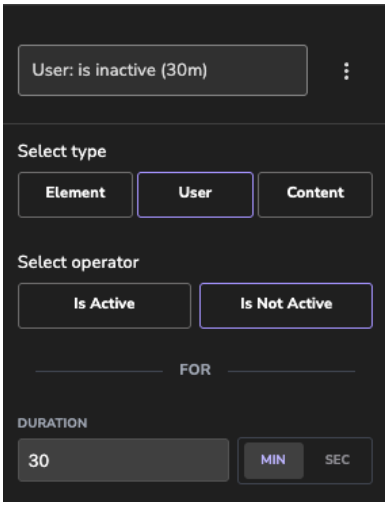
Checks the activity state of the end user. Use this to detect whether a user has been active or inactive for a specified duration.

Available statuses:

Status	Meaning
Active	The user is actively interacting with the application (mouse movement, typing, etc.)

Inactive	The user has not interacted with the application for a specified duration.

When using the inactive status, you specify a duration in seconds (e.g. 30 seconds). The Contextual Action will trigger after the user has been idle for that long.Tab visibility note: The inactivity timer continues running while the browser tab is in the background. If the timer elapses while the tab is hidden, the Contextual Action triggers immediately when the user returns to the tab.



Content

Checks how the end user has interacted with a specific piece of Userlane content (a Guide, Tooltip, Validator, or Message) within the current session.

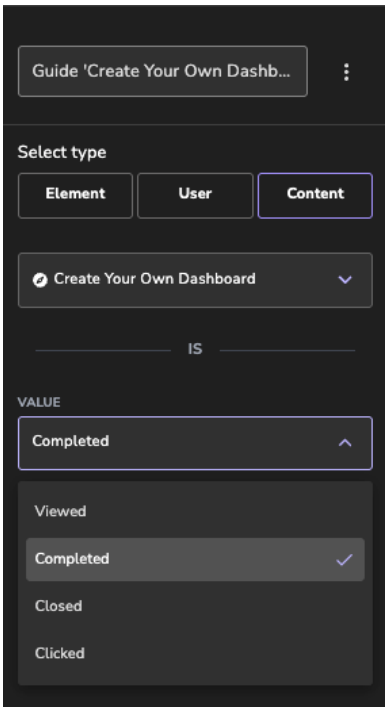
Available statuses:

Status	Meaning
Completed	The user has finished the content (e.g. reached the last step of a Guide)
Viewed	The content has been opened or displayed to the user
Closed	The content has been dismissed or exited before completion
Clicked	The user has clicked an interactive element within the content (e.g. a CTA button)

Use this to chain content together. For example, you could show a congratulations Message after a user completes a specific Guide, or load a follow-up Tooltip after a user views a particular piece of content.

When configuring a Content context, you select both the content type (Guide, Tooltip, Validator, or Message)

and the specific content item you want to evaluate.

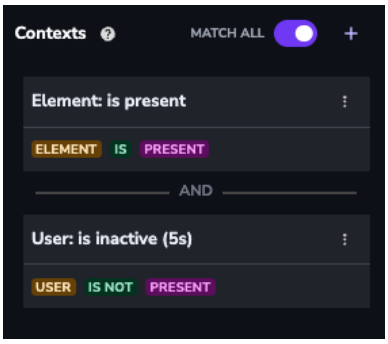


Combining multiple Contexts

You can add multiple Contexts to a single Contextual Action. When you do, you choose how they're combined:

- Match All (AND), all conditions must be true at the same time. This is the default.
- Match Any (OR), any single condition being true is enough to trigger the Actions.

The toggle between AND and OR applies to all Contexts within the Contextual Action. The label between your Contexts updates to show "and" or "or" so you can easily see the logic at a glance.



Reusing Contexts

Contexts are independent, reusable entities. You can create a Context once and apply it to multiple Contextual Actions. This means you don't need to recreate the same condition every time you need it.

If you later update a Context, the change automatically applies everywhere it's used, taking effect on the next page load. Active sessions continue using the Context version that was loaded at session start.

Automatic naming

Contexts are automatically named based on their configuration, so you don't need to label them manually. The generated name reflects the type, operator, and value of the condition (e.g. *User: is inactive (5s)*, *Element: is present*, *Guide 'Onboarding': is completed*).

The name updates live as you adjust the Context. If a referenced content item has been deleted, the name shows *[deleted]* in its place so the Context remains identifiable.

Since Contexts are reusable across multiple Contextual Actions, the auto-generated name makes it easy to identify and select the right Context without needing to open it.

Example Context configurations

Here are some common Context setups to illustrate how the three parts work together:

Rule	Type	Operator	Status	What it checks
If element is present	Element	is	present	A specific UI element has appeared on the page
If element is not present	Element	is not	present	A specific UI element has disappeared from the page
If element is clicked	Element	is	clicked	The user has clicked a specific element
If element is focused	Element	is	focused	A specific input field has received focus
If user is inactive	User	is	inactive	The user has been idle for a specified number of seconds
If user is active	User	is	active	The user is currently interacting with the application
If content is completed	Content	is	completed	The user has finished a specific Guide, Tooltip, or Validator
If content is viewed	Content	is	viewed	A specific piece of content has been displayed to the user
If content is closed	Content	is	closed	The user has dismissed a specific piece of content

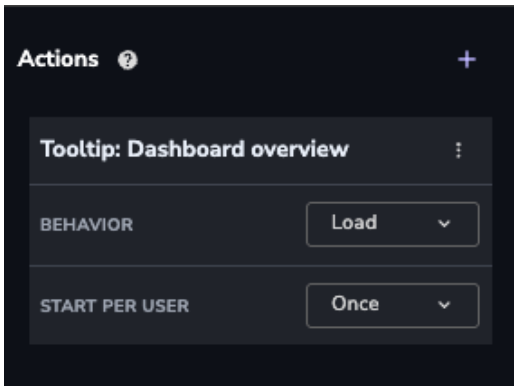
Actions

Last Modified on 08.06.2026

An Action defines what happens when the Contexts of a Contextual Action evaluate to true. Actions are the "then" part of the rule, determining which piece of Userlane content is delivered and how it behaves.

Every Action has two required parts:

1. **Content target:** the specific piece of Userlane content the Action applies to (e.g. a particular Guide, Tooltip, or Message)
2. **Activation type:** the behaviour to execute on that content (Start, Load, Show, or Hide)



Action types by content type

Not every activation type is available for every content type. Here's the full matrix:

Content type	Start	Load	Show	Hide
Guide	Yes	No	No	No
Tooltip	No	Yes	No	Yes
Validator	No	Yes	Yes	Yes
Message	No	No	Yes	No
Announcement	No	No	Yes	No
Beacon	No	No	Yes	No

Activation types explained

Start (Guides)

Starts the selected Guide. The Guide plays through normally from the beginning.

Optional: start from a specific step. You can choose a specific step to start from, which is useful for skipping an introductory section when the user has already seen it. If no step is specified, the Guide starts from step 1.

Guide rules:

- Only one Guide action is allowed per Contextual Action.
- A Contextual Action containing a Guide cannot also contain Tooltip, Validator, Message, Announcement, or Beacon actions. If you need to deliver a Guide and another content type from the same conditions, create separate Contextual Actions with the same Contexts.
- A Guide will not start while another Guide is actively playing. The player waits until the current Guide finishes or is dismissed.

Load (Tooltips, Validators)

Prepares the content so it is ready to appear when its standard trigger conditions are met. The content is not immediately visible; it is placed in a "ready" state.

For example, a Loaded Tooltip will display when the user hovers over its target element. A Loaded Validator will display when the user interacts with the relevant input field.

Tooltip viewport requirement: A Loaded Tooltip will only display when its target element is visible in the viewport. This is automatic and does not need to be configured.

Use Load when you want to conditionally make content available without forcing it onto the screen.

Show (Messages)

Displays the Message immediately when the Contextual Action conditions are met, without requiring any additional user interaction.

Messages are displayed in a pop-up view regardless of whether the user has previously seen the content. The Message is considered dismissed when the user explicitly closes the pop-up.

Hide (Tooltips, Validators)

The opposite of Load. Prevents the content from being loaded entirely, rather than hiding something that is already visible. The content is never prepared or made available to the player, and will not appear under any circumstances, even if its standard trigger conditions are met. For Validators specifically, this also means no validation is performed and no data is collected.

Use this to exclude content that is not relevant in a given workflow state. For example, you might Hide a Tooltip about a feature if the user has already completed the related Guide, or Hide a required-field Validator when the field itself is not present on the page.

Multiple Actions in a single Contextual Action

You can add multiple Actions to a single Contextual Action. When the conditions are met, all Actions execute together.

The key constraint is around Guides: if one of your Actions is a Guide Start, that must be the only Action in the Contextual Action. Tooltips, Validators, Messages, Announcements, and Beacons can be freely combined with each other.

Multiple Contextual Actions targeting the same content

A single piece of content can be targeted by multiple Contextual Actions. Each Contextual Action is evaluated independently, and if any of them has its conditions met, the content is triggered. This effectively creates OR logic between Contextual Actions targeting the same content.

Example Action configurations

Here are some common Action setups to illustrate how content types and activation types work together:

Use case	Content type	Activation type	When it triggers
Start a setup guide when a user clicks a button	Guide	Start	Context: If element is clicked
Start a guide from step 4 to skip the intro	Guide	Start (from step 4)	Context: If content (another guide) is completed
Load a tooltip onto a save button when the user is idle	Tooltip	Load	Context: If user is inactive (30 seconds)
Hide a validator when an earlier step isn't complete	Validator	Hide	Context: If element is not present
Show a validator immediately when a required field is focused	Validator	Show	Context: If element is focused
Show a congratulations message after a guide is completed	Message	Show	Context: If content is completed
Show a help message when a key element disappears	Message	Show	Context: If element is not present

Selector Settings

Last Modified on 15.05.2026

Why use it

When Userlane records an element in your application, it identifies it using a combination of attributes, properties like an element's ID, name, or data values. In some applications, these attributes are automatically generated and change over time, which can cause your Guides, Tooltips, or Tags to stop working.

Selector settings give you control over how Userlane records and identifies elements in your application.

Where to find it

Open the Userlane Editor and click the settings icon in the lower left corner.

Selector rules

Selector rules let you control which attributes Userlane uses when recording elements. Defining rules gives you confidence that your Guides, Tooltips, and Tags will continue to work as your application changes.

How it works

Each rule targets a specific attribute and tells Userlane how to treat it when recording. You can apply a rule to all elements in your application, or limit it to a specific element type.

There are three actions to choose from:

Insist: Userlane will always include this attribute in the selector, even if the element is already unique without it. Use this for attributes you know are stable and meaningful, such as custom data attributes like `data-testid`.

Prefer: Userlane will include this attribute when it needs to make the selector more unique, but will not force it if the element is already unique.

Ignore: Userlane will never use this attribute in the selector. Use this for attributes you know are auto-generated or unstable, such as dynamically assigned IDs.

Dynamic values

When creating a rule, you can also specify how Userlane handles attributes whose values change dynamically, for example auto-generated IDs where the number at the end changes with every page load.

Setting dynamic values to **Not allowed** tells Userlane to use only the stable parts of the attribute value when building the selector. Setting it to **Allowed** means Userlane can use the full value, including the dynamic parts.

If you are unsure, start with **Not allowed**, this is the safer default for most applications.

Good to know

Attribute rules apply to new recordings only. Existing selectors in your Guides, Tooltips, and Tags are not

affected when you create or change a rule.

Add and manage multiple languages

Last Modified on 11.03.2026

About Managing Languages

In Userlane you can manage languages and translations both directly in the Userlane Portal and Editor as well as offline by exporting and translating texts in a .csv or .xlsx file, then importing them back into Userlane.

In this article we'll cover the following topics:

- adding and publishing languages
- auto-translation
- manual translation
- testing translation
- best practices

Adding and publishing languages

You can create a new language in the “Customize” - “Languages” section of the Portal. Please note that Userlane follows specific priorities to detect which language is shown to end users, as outlined here.

- The **language name** is displayed to identify the language.
- The **language key** will be compared to the HTML and browser languages in order to automatically detect the language. It typically consists of the first two letters of the language name (e.g. English = EN) or 5 letters (e.g. American English = en-us).
    - Use the following ISO codes to organize your languages
- The **Copy-From option** allows you to decide which language the texts of your new language should be copied from. This helps you to write the correct translations later.
- If you no longer require a language, you can archive or delete it.
    - **Archived languages** cannot be published for any content but can always be moved back to the current languages.
    - **Deleting a language** will also remove all content associated with that language.

Publishing languages

After creating a language, you can work in this language and publish it.

- **Publish a language for all existing content** in the “Customize” - “Languages” section via the dot menu next to the language you want to publish. Make sure you have existing texts in this language before publishing them here.

- **Publish a language for specific chapters or Guides only**using the settings in the Userlane Editor at the Guide or Chapter level. These settings can be found in the status dropdown on the Guide overview page, or under the Publish dropdown for an individual Chapter or Guide. This allows you to translate and publish your Guides in a new language step by step. Make sure to activate a language for the chapter and for the Guide to show the chapter title, subtitle, and Guide texts in this language.
    - Be mindful to ensure texts are updated in all public languages before setting content live.

Good to know

- We support right-to-left languages like Hebrew or Arabic, but adjusting formatting for right-to-left is not currently available.

Auto-Translation

You can use Userlane auto-translation for both Guides and Messages to quickly and easily translate content into your target languages.

- Entire Guides or individual Guide steps can be auto-translated in the Userlane Editor. For more detailed information, please refer to this article.
- Messages content (Announcements, Standard Surveys, and NPS Surveys) can be auto-translated in the Userlane Portal when you create or edit Messages.

ℹ The "auto-translate" feature relies on the OpenAI API, a service provided by Microsoft. No Personally Identifiable Information (PII) or Sensitive Personal Information (SPI) is being processed when used. No prompts or completions are stored in the model during these operations, and prompts and completions are not used to train, retrain or improve the models.

For additional questions, please don't hesitate to contact our Customer Success Team.

Manual Translation

You can also choose to manually translate your Userlane content in the Portal or Editor, or by exporting your texts, translating them offline, and then importing the translations back into Userlane.

We recommend having a dedicated process for translations involving the export/import approach and that you regularly export your texts after bigger changes, so you can better track your work.

To translate your content into different languages, you can use our text import/export feature:

- Download all your existing texts
- Download texts for a specific chapter or Guide only,

- update the texts for each language, and
- upload the new file.

You can use excel (XLSX) or comma-separated values (CSV) formats for export and import.

> **ℹ Important**
>
> - Any "<missing element>" placeholders in the exported text will be replaced with relevant info box content or localized links upon import.
> - Modifying the file (including the original language) will apply changes after importing, even to the original language. To import languages, delete other "language" columns in the exported excel file.
> - Identify each language using the language code in the first row (e.g., "en"). Do not delete or change the first 2 columns.

Test translations

For testing translations it is recommended to first create a User Segment that targets only you and then apply to the Userlane content you want to test on.

Please then log out of the Userlane Portal for the real end user experience.

For Browser Extension Implementation:

Change the language of the application to the one you want to test in.

Should this not impact the view it could be that the html language does not change, so you would have to change your browser language accordingly.

You can find here in what order Userlane detects language.

For Snippet Implementation:

For checking languages, you can utilize the console. To test Userlane for a specific language setting, you can enter the following line to the console (we used English in the example: EN):

```
Userlane('lang', 'EN');
```

This will change the language of your Userlane so you can test if all texts are in place and translated.

Best Practices

Choose a fallback language

Let's say you created two languages: English and French. We will match the corresponding language

automatically for every French and English-speaking end user. To cover every other language, like German or Spanish, you can define a general fallback solution for every chapter or Guide.

- **Show the default language instead (Your Default Language)** This option will show the text in the default language you defined in the “Customize” - “Language” section for all those users that don’t have a matching language.
- **Hide content for those users completely.** This Guide will not appear in the Assistant for users without a matching language.

Where to edit the language for each content type

	Portal	Editor	Language Export/Import
Guides	yes	yes	yes
Chapter Titles	yes	no	yes
Welcome Slide Text	yes	no	yes
Messages	yes	no	yes
Tooltips	no	yes	yes
Default Texts	yes	no	yes

Check which language is shown when opening the Editor

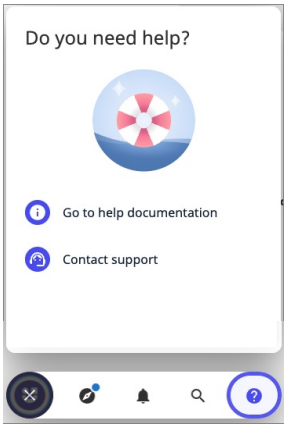
Userlane opens the Editor in the last language you worked in. This helps you continue editing seamlessly without needing to reselect a language. Keep this in mind when switching between languages to avoid unintentional edits in the wrong language and to understand why the Assistant is displayed to you in a specific language.

Userlane Assistant Help

Last Modified on 12.01.2024

About Assistant Help

The Assistant Help option allows you to add two links to additional resources such as a help center, support chat, or a communication platform channel such as Slack or MS Teams. Enable the **Help** button to link users directly to these resources without leaving your application.



Add and enable links

We display two default use cases for the links but you can provide links to any resource that you think would be most helpful to your users. Remember to change the default texts of the links if you are linking to resources other than documentation or your application's support. See *Customize the Help option,* below.

To add a link:

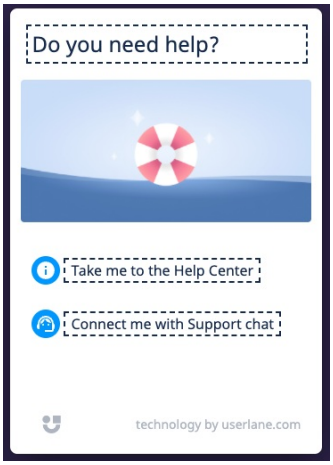
1. Go to **Customize** > **Help** in your Userlane Portal.
2. Enter the full URL of your link in the Documentation Link input field, e.g. https://docs.userlane.com.
3. To add a second link, enter the full URL in the Support Link input field.
4. Once you are ready to activate a link for your users, enable the corresponding **Display Link** toggle.

> ℹ The **Help** button in the Assistant is only displayed to users if you have enabled at least one link.

Customize the Help option

To edit the default texts for the title and links:

1. Go to **Customize > Texts** in the Portal.
2. Locate *Assistant* in the right sidebar, then select **Help**.
3. Enter the new text in the dashed input fields for the title and link labels as needed.



4. Click **Save Your Changes**.

To change the default Help image:

1. Go **Customize** > **Design** in the Portal.
2. Locate *Help Desk* in the right sidebar, then click **Upload Image**.
3. Drag an image file to the upload window or click **Select File** to choose an image from a storage folder. A preview of the Help window displays.
4. Click **Save Your Changes**.

> ℹ You can upload a PNG, JPEG, or GIF file with a maximum size of 8MB. The recommended image proportions are a 4:2 ratio and 652x320px resolution. See more about how Userlane displays your images in our Working with images article.

How to test your Guides before publishing

Last Modified on 11.03.2026

There are several ways to test your Guides depending on the functionality you are testing and where you are in the rollout stage.

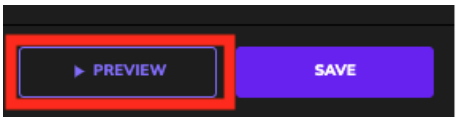
Here is what you can do:

1. Preview a single Guide

With the Preview mode, you can test the functionality of a specific Guide and preview changes before saving them. Only people with access to the Userlane Editor can start the preview.

To preview a single Guide:

Open the Guide in the Editor and click on the preview button.



2. Send out the Guides via link

You can test Guides by sending a link to any user. The Guides need to be set to public and the Userlane snippet implemented. They won't be visible to your end-users and can be kept private. Testers don't need access to the Userlane Editor.

To test Guides via a link:

Ensure that the Guide is set to public and the chapter is private. The Guide won't appear in the Userlane Assistant but can still be sent via link.

3. Partially implement Userlane

Some users can test the entire Userlane training experience. This method is useful for training employees on third-party applications. You can test the Userlane Assistant with a small group of users who don't require access to the Userlane Portal.

To partially implement Userlane:

To test Guides and chapters, set them to public in the Userlane Portal.

Then, share this link with your test users to register and download the Userlane Browser extension:

family.userlane.com/mll.

Once they have the extension installed, testers will see the Userlane Assistant when using the relevant third-party applications.

4. Test your Assistant in a staging environment

Test the whole Userlane Assistant in your staging environment before you implement Userlane into your production environment. The Userlane snippet has to be implemented only into your staging environment.

To test in a staging environment:

Set at least one Chapter and one Guide to public in your Userlane Portal. Since Userlane will only appear when the snippet is implemented, the Userlane Assistant will only appear in staging, not in production.

5. Test only some Guides and functionalities in a staging environment

The Userlane snippet must be implemented into your staging environment. It can also be implemented into your production.

To test new Guides in a staging environment:

If you already have the snippet implemented in staging as well as production, do the following:

1. When implementing your snippet into the staging environment, add the following code line (with your respective user_ID) just before the init command into the Userlane snippet:

   ```
   Userlane('identify','user_ID',{staging:true});
   ```

2. After doing this, create an Attribute in the Userlane Portal with the attribute name 'staging' and the data type 'boolean'.

3. Filter your user list based on this attribute with 'staging' 'equals' 'true' and save it as a segment that you e.g. name 'only for staging'.

4. Apply this segment to all the chapters and Guides that should only appear on your staging for now.

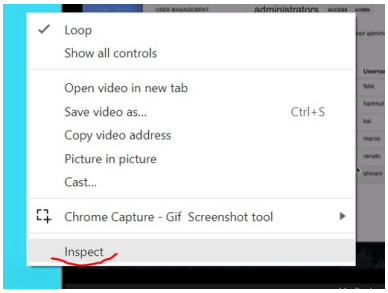
After applying the described segmentation, set all the chapters you want to test to “public” so they appear on your staging page.

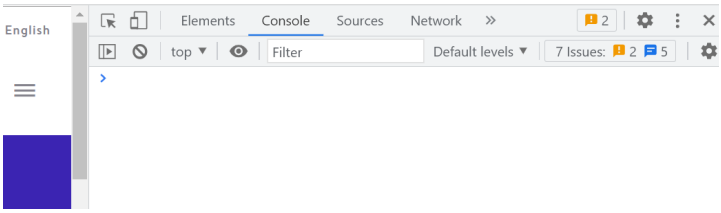
6. Testing user and attribute segmentation with a Snippet Implementation

Once you've applied a user segment based on user ID or specific attributes, you can check if the segmentation is working correctly. Simply use your browser's console, provided you have the snippet implemented, to easily verify the segmentation.

1. Open the browser's console by clicking the right mouse button on the page and selecting the option

"inspect" from the menu that appears and then selecting "console" in the new section that opened.





In the console, you can enter commands that will allow you to change some Userlane settings which is helpful for testing.

2. In order to test the behavior of Userlane with a specific user ID, you can enter the following command into the console and press ENTER. The green part needs to be replaced with your own value:
   `Userlane('identify', 'yourTestUserID');`
   Now, you'll see what Chapters, Guides, and Announcements this specific User sees. Remember, some notifications only appear once per user. After page reloads, the User will return to their original state.

3. You can use the console to emulate not only a user but also some attributes. To do that, please add the following line in the console and press ENTER:
   `Userlane('identify', 'anyTestUserID', { attribute_key: 'example_value' });`
   This will show you the Chapters, Guides, and Announcements visible for Users with a given Attribute.

7. Testing languages

Make sure to log out of the Userlane Portal, so you can test the behaviour as an end user.

For a Browser Extension implementation:

Change the language of the application to the one you want to test in.

Should this not impact the view it could be that the html language does not change, so you would have to change your browser language accordingly.

You can find here in what order Userlane detects language.

For a Snippet implementation:

Also for checking languages, you can utilize the console. To test Userlane for a specific language setting, you can enter the following line to the console (we used English in the example: EN):

`Userlane('lang', 'EN');`

This will change the language of your Userlane so you can test if all texts are in place and translated.

Userlane Assistant Checklist

Last Modified on 01.12.2025

Use the checklist to make sure you and your users can see Userlane. Userlane's targeting settings can prevent users from seeing Userlane.

Here is what you can do:

1. Make sure Userlane is loaded in the correct application

Userlane can be loaded in your application via the implementation of the Userlane snippet or via the browser extension. If you only use the browser extension, for now, ensure that you are signed in to the Userlane Portal and that the application URL under **Settings** > **Application URLs** is correct. Refresh your application page after any changes.

2. Make sure that you have a public language

Go to **Customize > Languages** and make sure that at least one language is public. Only public languages are shown to your users.

3. Add Guides to a public Chapter

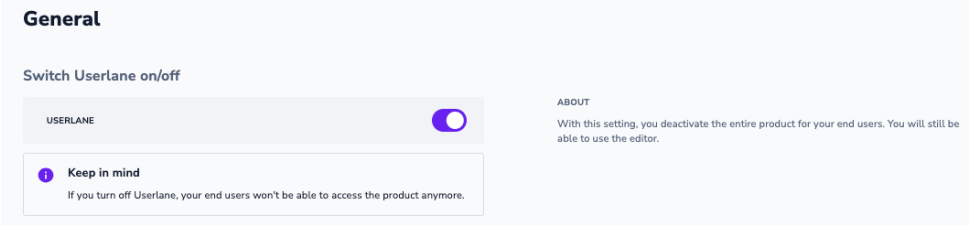
Add at least one public Guide to a public chapter in the Userlane Editor. Guides in the "Unsorted guides" folder are not part of a chapter.

4. Make sure that your segmentation is set up

Open the segmentation options by clicking on the three dots next to a Chapter or a Guide. Select**Edit Segmentation**. Make sure that the user profile you use in your application matches these segmentation settings. Note that the chapter segmentation affects all Guides within this chapter.

5. Enable Userlane for your Application

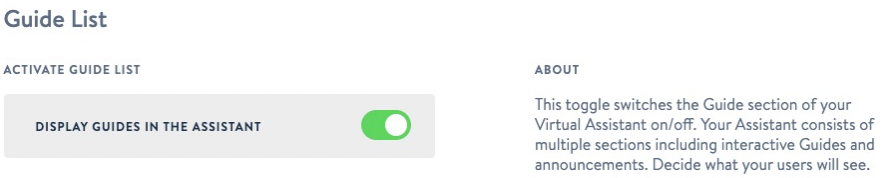
Select **Settings** and confirm that the Userlane toggle is enabled on the *General Settings* page:



Please note that Userlane will be shown on all pages and URLs where the Userlane snippet is implemented. If the snippet is not implemented yet you can use the Userlane browser extension to test and build your Guides.

6. Activate Guide List

To ensure that your Guides are available from the Assistant, Go to **Customize > Assistant** and confirm that the **Activate Guide List** toggle is enabled:



7. Your page is blocking Userlane

Sometimes the Userlane elements are not loading properly due to a Content Security Policy (CSP) or CORS (Cross Origin Resource Sharing) Policy running on the underlying app and blocking unfamiliar sources. An indicator of this is usually a red error in the browser console where CORS or content security policy is mentioned along with Userlane. If this is the case, please share with your developers this article.

ℹ CSP is an added **layer of security** that helps to detect and mitigate certain types of attacks.

8. Allow 3rd party cookies

Some browsers block 3rd party cookies by default, including the ones coming from Userlane. This will block some of the Userlane elements. You can check if this is the case by allowing all cookies in your browser settings (only for the sake of testing). If this has solved the problem, you can put your app's and Userlane's domain ([*.]userlane.com) in your browser's "3rd party cookie allowed list" and switch the main cookie setting back to default. You may need to ask your colleagues in IT for help.

9. Clear your Cache and Cookies

At times previous website settings and histories impact how good websites run. After the browser history for all time is cleared, sign in to the Userlane Portal again and refresh your application page.

10. Install Userlane Browser Extension via Invitation

If you are using Userlane with the Browser Extension, please make sure that you activated and installed the extension via the invitation link you received per E-Mail or the activation link that was shared with you. A separately installed extension will not recognize you as a user.

11. SSO installation

If Userlane was implemented via SSO (Single Sign On) which usually is preconfigured by your developers, for issues that could not be solved with the points above, please get in touch with your Userlane Customer Value Manager.

12. Contact us

Should none of the mentioned points before solve the behaviour, please do not hesitate to reach out to our Support Team.

Share Guides directly with a link

Last Modified on 01.12.2025

Why use it

Use a link to direct your users to a specific Guide. Each Guide has one unique ID.

You can use this link for all your users; when clicked, they are redirected to the default URL that you have set up in the application settings. The linked Guide starts at the default URL.

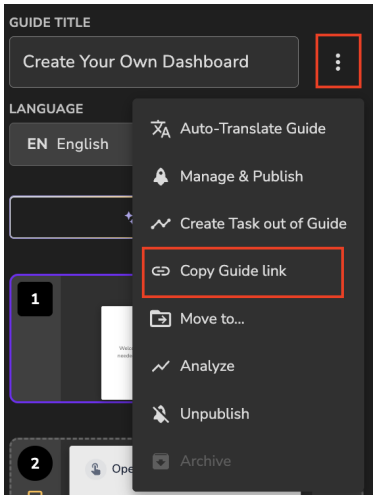
Where to find it

You can copy a Guide link in two ways:

1. **From the Guides list:**
   In the **Guides** section of the Editor, hover over any Guide. A link icon will appear.
   Click the icon to instantly copy a direct link to that Guide.



2. **From within a specific Guide:**
   Open the Guide and click the three-dot menu in the top-right corner.
   Select **Copy Guide Link** to copy the link to your clipboard.



How to trigger a Guide on a different URL

You have 2 options:

Option 1)

Add this to the trigger link: "?redirectTo=thespecificURL". Replace *thespecificURL* with the URL where you want the Guide to start.

Example:

https://go.userlane.com/31610/21112?redirectTo=www.family.userlane.com

Option 2)

Add "?userlaneStart=12345" to your URL. Replace the number *12345* with the ID of the Guide you want to trigger.

Good to know

- Guides can be triggered by a link if the snippet has been added to your source code or in browser extension implementation cases as long as the recipient is authenticated as an end user (via SSO or user import).
- You can include the link in your help articles, in emails, or send them via your support chat.
- If you have different subdomains for different clients, you will need to adapt the URL for each of them as explained above.
- Please note that some applications define specific redirect URLs. In such cases, you might get automatically redirected to a different URL as defined in redirectTo. This is a setting on your application and can not be adjusted by Userlane.
- For Option 2: if your URL contains a hash character (#), you need to add the Userlane code before the hash, example: www.example.com/**?userlaneStart=12345**#/contact/

How to start a Guide with a custom JavaScript trigger

Read this article to learn how to start a Guide with a custom trigger.

Copy Guides between multiple applications

Last Modified on 08.05.2026

If you manage multiple similar applications, this article will walk you through the process of duplicating Guides from one application to another. It covers

- Why use it
- Permissions
- Overview of copied items
- How to Copy Guides
- Language Mapping

Why use it

The option to copy Guides within Userlane Portal offers significant benefits when managing multiple similar applications:

- **Time-saving:** Instead of creating Guides from scratch for each application, you can simply copy existing Guides, saving you valuable time and effort.
- **Consistency:** Copying Guides ensures consistency across applications, maintaining a standardized user experience and reducing the chances of errors or inconsistencies.
- **Efficiency:** With the copy option, you can quickly replicate Guides across multiple applications, streamlining the onboarding and training process for your users.
- **Easy adaptation:** By copying Guides, you can easily adapt and customize them to fit the specific requirements of each application while maintaining the core structure and content.
- **Simplified management:** Copying Guides allows for centralized management within Userlane Portal, providing a convenient way to organize and update Guides across different applications.

Permissions

- Any manager role (admin, moderator & contributor) can copy Guides from one application to another.
- A manager requires application access to the target application.

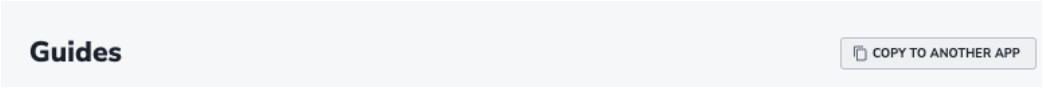
Overview of copied items

What is copied over	What is NOT copied over

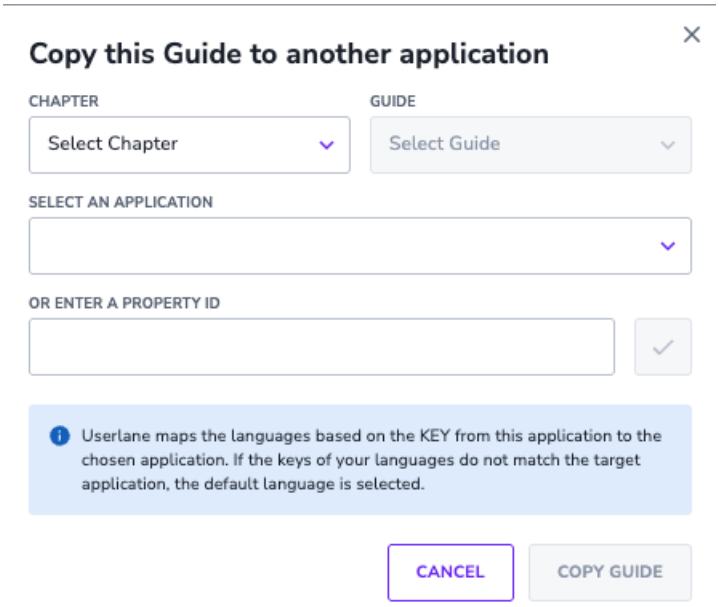
• Guide title; subtitle
• Guide structure (steps)
  ◦ Step configurations
  ◦ Step texts including media elements
	• User segments
	• Page segments
	• Chapter allocation
	• PDF recordings

How to Copy Guides

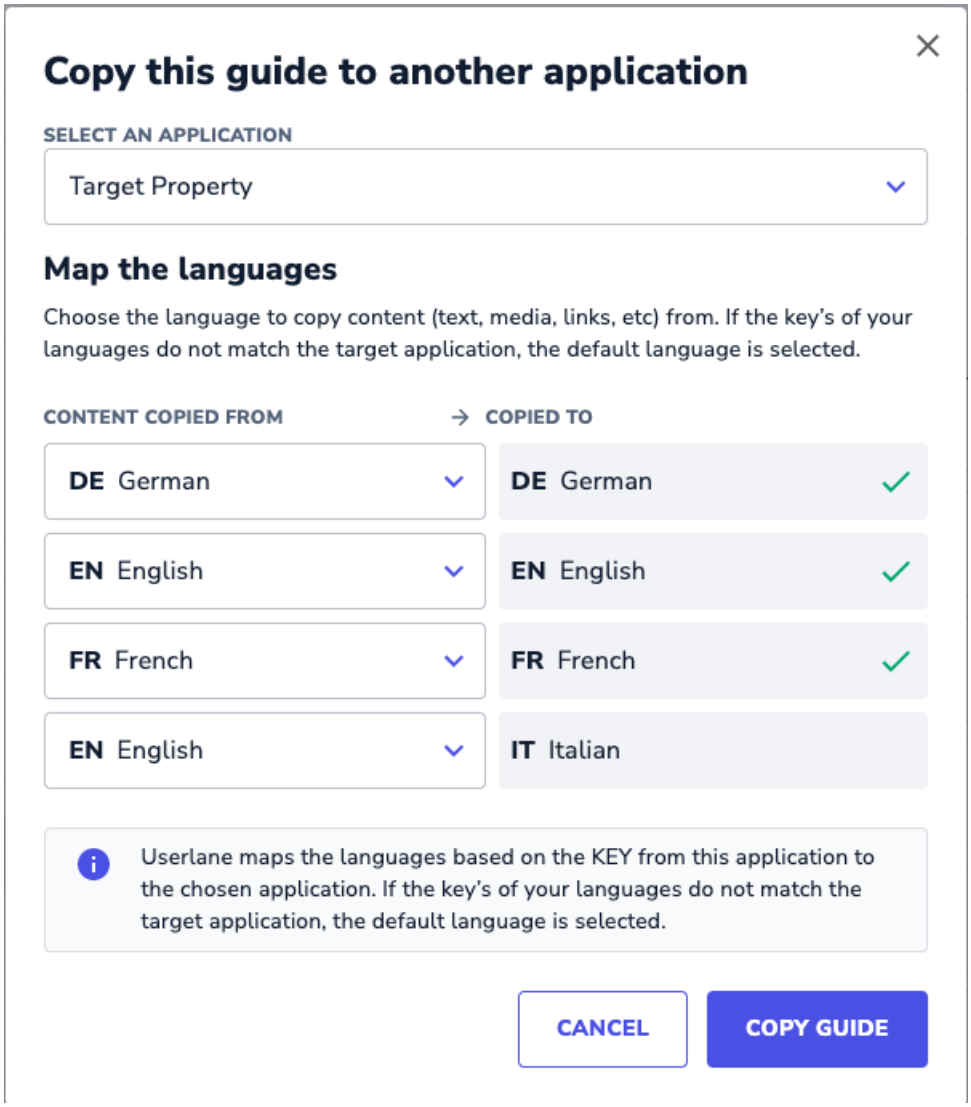
1. Sign into Portal (Source Application) > Customize> Guides
2. Click on the "Copy to another app" button.



3. Select the target Guide and application from the dropdown menu.



4. Select the language that you would like to copy the Guides.



5. Click on "Copy Guide".

i Good to know

- The original application is called the source application and the application that the Guides are copied over is called the target application.
- When a Guide is copied, it becomes a draft in the target application. To make it live, you must assign it to a chapter, add any needed segmentation, and publish it in the target application's Portal.
- **Deleted or archived** Guides cannot be copied.

Language mapping

You can select the language you want to copy content from. The available language options depend on the number of languages in the target application. For example, if there are 3 languages in the target application, you will see 3 options. If you want to copy the Guide in just one language, simply choose that language in all available language dropdowns.

By default, Userlane suggests a language mapping based on the following criteria:

- If there is a matching language KEY between the target and source application, we suggest using that language version.
- If there is no matching language KEY, we suggest using the default language version.

ℹ This is not applicable to self-hosting customers.

Define the behavior of your Guides

Last Modified on 12.01.2024

Why use it

You can customize the Guide behaviour to

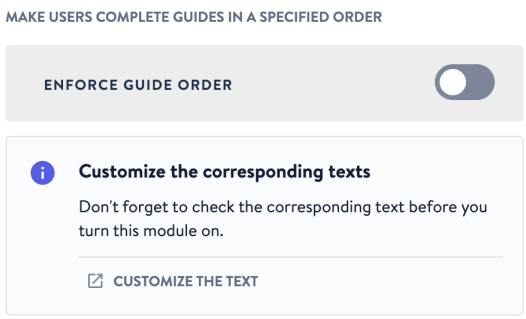
- adjust the user experience
- enforce a specific behaviour

Where to find it

The following options are under the **Customize > Guides** tab in the Portal.

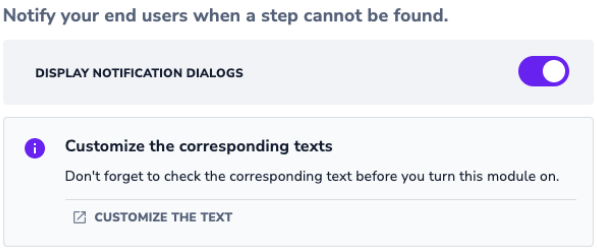
Customize the behaviour

Require your end users to complete Guides in a specified order



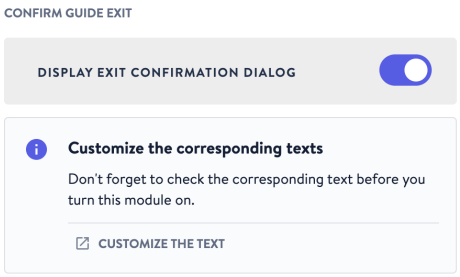
If activated, users must complete all Guides in the predefined order. If deactivated, users can complete Guides in any order they prefer.

Notify your users when a step can not be found



If activated, users will see a loading step and error notification in case a step can not be found. Should the last step still be available on this page, the Back button will be present.

Confirm exit from a Guide



Determine if your end users should be required to confirm that they want to exit the Guide when they click on the "X" in the top right corner of a step.

> ℹ An exit confirmation increases the completion rate.

Display an additional hint

If your end users have to interact with your application and remain inactive, we'll show a large arrow that points at the elements that they need to interact with.

Add the option for end users to go back one step



An extra button to the left of the main button will be displayed. It can be omitted entirely or used to offer your users more flexibility.

Search through the Userlane Assistant

Last Modified on 19.03.2024

About Search

Finding specific content can be challenging when you have a lot of it. That's why we created Userlane Search! Your users can easily search for content right from the Userlane Assistant.

Connect the Search feature to popular knowledge bases like Confluence, Zendesk, Sharepoint and KnowledgeOwl.

 Through our own integration with KnowledgeOwl, you can easily search and read our help articles directly from your Userlane Assistant!

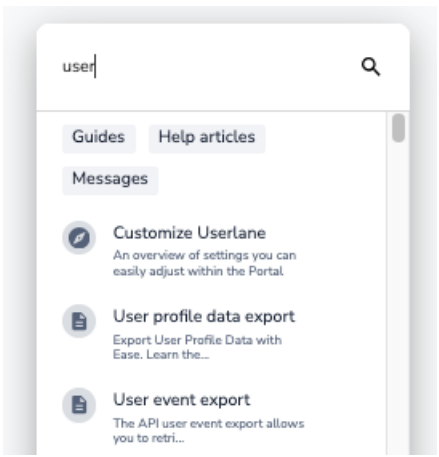
In this article we cover

- how it works
- content and ranking of the search results
- how to customize labels
- how to provide additional support

How it works

Once Search is enabled, users can simply click the Search icon in the Assistant and type a query in the Search input field.





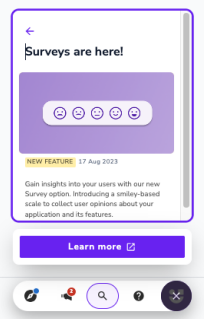
Userlane Search applies queries to the following:

Content Type	Included Elements
Interactive Guides	Chapter title, Chapter subtitle, The title of the Guide, The subtitle of the Guide, Intro/Outro Title, Step title, Text and content of a step, Infobox content, Link title, Link description, Content of specific value-inputs
Announcements	The public title of the Announcement, The message, The text of the button of the primary link, The text of the button of the secondary link
Documents	The page title of the document, The body text of the document

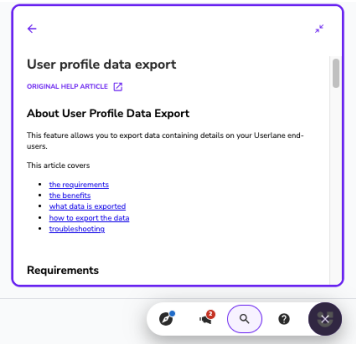
When you click on the result:

an Interactive Guide will immediately start

an Announcement will be shown to you, e.g.



a Document will show you the text of the document and also offer the option to go to the original article, e.g.



Search results and ranking

Now that we know which content types can be found through the Userlane Search, let's talk about how Search structures the results.

What's included

The Userlane Search ensures that only accessible content is shown in the search results. What do we mean by accessible content?

Guides

- Only show active Guides in active chapters
- Only show Guides that match user segmentation
- Only show Guides that match page segmentation
- Only show Guides in the language of the user or with a fallback language

Announcements

- Only show Announcements active at the time of searching
- Only show Announcements that match user segmentation
- Only show Announcements that match page segmentation
- Only show Announcements in the language of the user or with a fallback language

Documents

- Documents searched through an integration with a knowledge base are accessible based on the permission settings for the connected instance.

Ranking

Userlane Search ranks according to **Term Frequency / Inverse Document Frequency**

Term Frequency

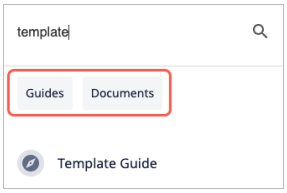
e.g. searching "user" ranks a tutorial that contains the word "user" five times, higher than a tutorial that contains "user" only once.

Inverse Document Frequency

e.g. searching "user" ranks a short announcement that contains only 10 words, one of which is "user", higher than a long tutorial that contains twenty steps, one of which contains the word "user" once.

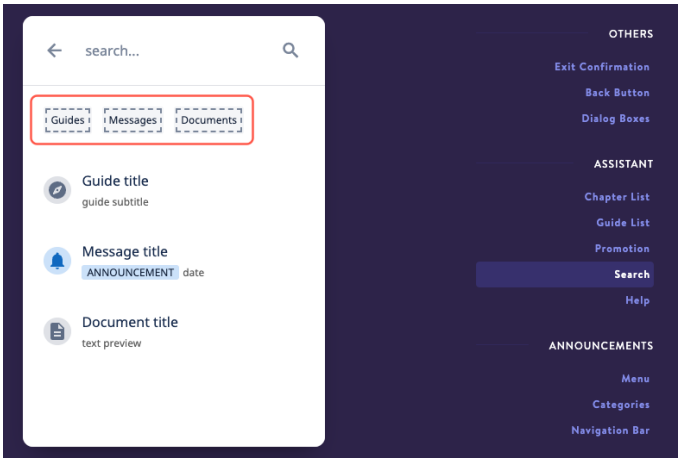
Content filters

If results include more than one content type, users can select content filters to refine their results to specific types (Guides, Announcements, and documents). A maximum of 50 results is displayed.



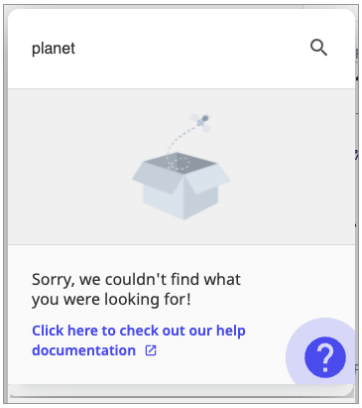
Customize content filter labels

You can customize the default filter label texts from the Portal by going to **Customize > Texts**, then select **Search** under *Assistant*.



No matching results

To provide users with additional support or resources, enable an external help link that displays automatically if they receive zero results for their search. This link can direct them to either an external documentation page or to their managers via a "mailto:"



To enable Search for an application, go to **Customize** > **Search** in the Userlane Portal.

Customize default texts

Last Modified on 12.01.2024

About Default Texts

Your Userlane content should match your organization's style and branding. Userlane has one area (**Customize > Texts**) for you to manage default texts.

By **default texts,** we define any generic texts that are already offered by us, like buttons' texts (e.g. next, back, skip), which you can adjust according to your needs, anytime in your Userlane Portal.

> ℹ Keep in mind that any changes to the default texts would be applied to your whole Assistant and will affect all step types of the adjusted type.

In this article we cover

- the benefits
- who sees the default texts
- what content types can be customized
- how to handle translations

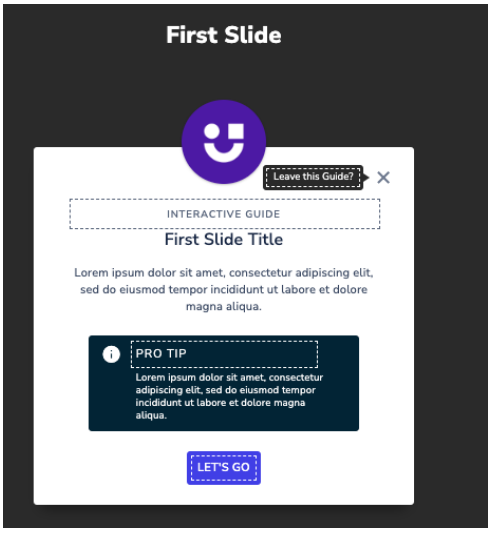
Why use it

- to match your style
- to translate default texts easily

Who sees the Default Texts

All your users see the default text for any Userlane content type (e.g. Guides) when it appears for them.

Example: This is the overview of the First Slide. The First Slide always appears at the beginning of a Guide. Thus, any Guide currently shows this button with the content "Let's Go", but you can edit this text in case you prefer something else.



Content Types

Content Types that can be adjusted under **Customize > Texts**:

- Explaining Steps
- Interactive Steps
- Any Value Steps
- Specific Value Steps
- Others
- Assistant
- Announcements

Translating Default Texts

You can either translate them directly within the Userlane Portal or export all texts and translate them in bulk under **Customize > Languages**.

Customize colors and designs

Last Modified on 12.01.2024

About customized colors and designs

Your Userlane Design should match your organization's style and branding.

In this article we cover

- the benefits
- what to customize
- how to set it up

Why use it

Customizing the color and design has several benefits:

- **Branding consistency**: Customized colors allow you to align your Userlane Design with your organization's brand identity, ensuring a consistent and cohesive visual experience.
- **Enhanced user experience**: By choosing colors that resonate with your target audience, you can create a more engaging and visually appealing Userlane interface, leading to a better user experience.
- **Increased brand recognition**: Consistently using your brand's colors across various touchpoints, including Userlane Guides, helps reinforce brand recognition and reinforces your organization's visual identity.
- **Improved accessibility**: Customizing colors allows you to consider accessibility guidelines and make adjustments to ensure proper color contrast, making your Userlane Guides more accessible to users with visual impairments.
- **Tailored visual hierarchy**: By selecting the right colors for different elements such as buttons, infoboxes, and hints, you can create a visual hierarchy that guides users' attention and improves the overall usability of your Userlane Guides.
- **Personalization and differentiation**: Customized colors allow you to stand out from competitors and create a unique visual identity that reflects your organization's personality and style.

What to customize

You can change the following settings:

- the Assistant avatar, e.g. logo of your company, a question mark (View our Working with images article for more details on image file recommendations.)
- the color of infoboxes
- the color of buttons
- the color of additional hints

- the color of tooltip icon
- the corner radius

ℹ Important

The Design settings will affect the whole Assistant.

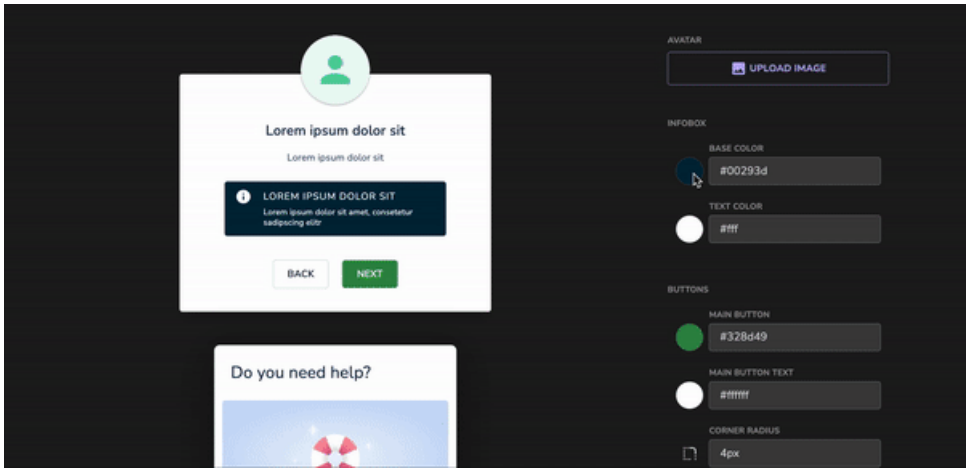
If you e.g. change the color of a button here, you'll change the colors of all step buttons in all of your Guides.

Set it up

To customize the colors and designs of your Guides, go to **Customize > Design** in the Userlane Portal.

You can define a color in two ways:

- Add a Color Code
- Type the color name



Good to know

Userlane elements (size, position, etc.) can be modified by using CSS (Cascading Styles Sheets), in case it's required to adjust more than is available in the Userlane Portal.

You are responsible for this type of implementation and its maintenance.

Please talk to your web developers to implement those additional changes in your webpage's code for Userlane elements.

User segments for better targeting

Last Modified on 13.04.2026

About User Segments

User segments are an important and powerful tool you can use to filter Userlane analytics as well as target your content to specific audiences.

Userlane provides a standard set of attributes you can use to create user segments but you can also enrich user profiles with custom attributes and utilize those for user segments.

In this article we'll cover:

- the benefits of user segmentation
- using custom attributes
- creating user segments with AI
- creating user segments manually
- further considerations

Why Use User Segmentation

- **Data-Driven Decision Making** - Filter HEART analytics with user segments for more precise data.
- **Enhanced User Experience** - Tailor experiences for different user groups.
- **Efficient Resource Allocation** - Prioritize efforts for high-value segments.
- **Personalization at Scale** - Automate personalized content delivery.
- **Targeted Marketing -** Improve campaign relevance and boost conversion rates.
- **Higher Conversion Rates -** Focus on segment-specific pain points.

Using Custom Attributes for User Segmentation

Userlane provides you with behavioral data out of the box that can be used for user segmentation (read more on that here), but user segmentation becomes even more powerful when you enrich user profiles with custom attributes.

Browser Extension (BX) Implementation

SSO

When configuring a Single Sign-On (SSO) integration, you can opt to send additional attributes to Userlane. These attributes are then sent automatically to Userlane from your Identity Provider (IdP) for each user. Find more info here.

Attributes that are commonly sent via SSO are:

- country
- department
- mail
- userType
- jobTitle

You can find SSO created attributes in Userlane on the 'company attributes' page and they can automatically

be used for user segmentation.

You can also import additional attribute values manually as described in this article.

Note that you must be an Administrator or Moderator in order to create and edit user segments.

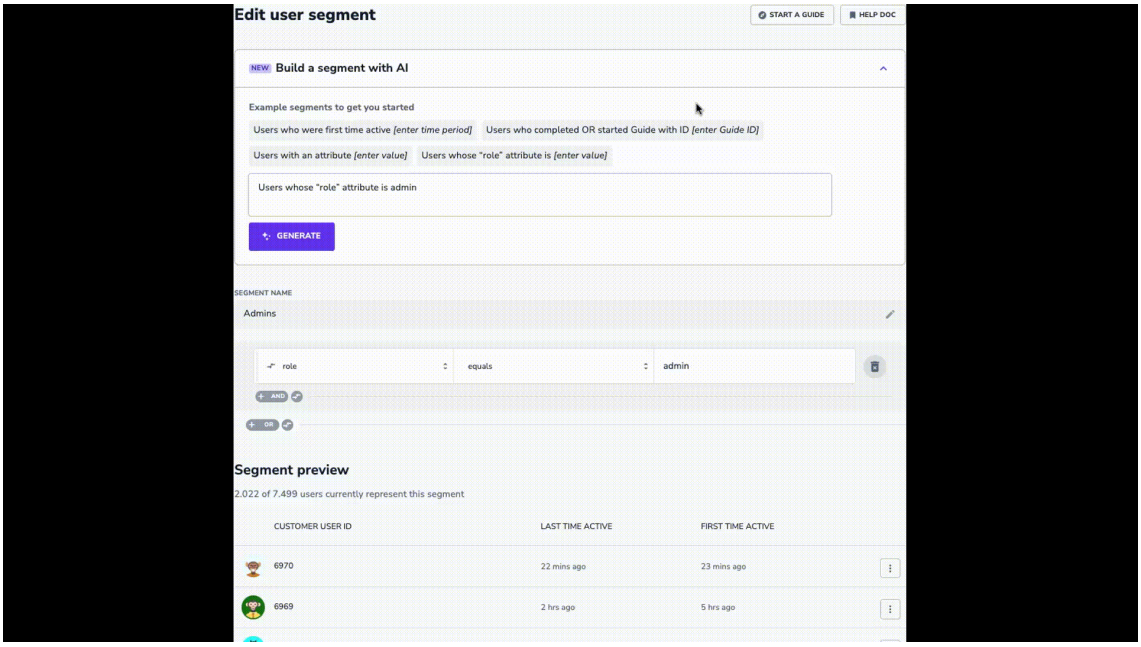
Snippet

Your developers can pass custom attributes via the Userlane .js snippet using the 'identify' command. Find more info here.

To use custom attributes from the .js snippet in user segmentation, you must first create the attribute on the 'attributes' page in the Userlane Portal.

Leverage AI to create User Segments

We implemented a conversational AI interface to help you create user segments faster and easier. Using natural language, you can describe the attributes and logical connections you want in your user segment. The AI does the hard part and you simply need to review, save, and apply the segment once it's done.



We provide example segments to get you started in our AI interface so that you can easily create user segments using the most common standard and custom attributes. Note that examples for the 'role' and 'country' attributes will only appear if you use those attributes in Userlane.

When utilizing the AI to create a segment based on Guide Interaction, be sure to use the Guide ID so that the AI knows exactly which Guide you're referring to. To find your Guide ID navigate to the Edit Guide page.

Create User Segments Manually

Choose data:

You can build a Segment based on

- standard user data

- user behavioral data
- custom user attributes

Choose a connection type:

There are various ways to segment and target your users. With **User ID** and any **attribute** you can choose between these connection types:

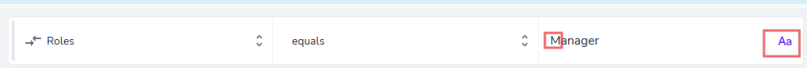
Connection Type	Logic	Example
Equals	Checks for an exact match of the input.	Role equals "admin" results in a segment of all users with the value "admin" for the "role" attribute.
Does not equal	Checks for values that are not an exact match of the input.	Role does not equal "admin" results in a segment of all users where the "role" attribute is anything but "admin".
Starts with	Checks for values that start exactly as the input.	Role starts with "admin" results in a segment of users where the "role" attribute has values like "admin", "admins", or "administrators".
Contains	Checks for values where the input is present.	Email contains "userlane" results in all email addresses where "userlane" is present.
Does not contain	Checks for values where the input is not present.	Email does not contain "gmail" results in all email addresses that do not have "gmail" present.
Is one of	Checks for values that match the input in a set of specified set of values.	Id is one of "123", "456", "789" results in a segment of users with one of those ids.
Is not one of	Checks for values that do not match the input in a set of specified set of values.	Id is one of "123", "456", "789" results in a segment of users without those ids.
Is empty	Checks for values that are empty for the given attribute.	Country is empty results in a segmentof users where the country attribute has no value.
Is not empty	Checks for values that are not empty for the given attribute.	Country is empty results in a segmentof users where the country attribute has any value.

Apply the Segment: Filter analytics and target content.

To use a user segment to filter analytics, select the segment you want to use a filter from the dropdown that says 'Everyone' by default on the analytics pages.

You can apply a segment to content in the Portal (for Guides, Chapters, Messages) and in the Editor (Tooltips, Tags).

ℹ If your attribute values are case-sensitive, activate the case-sensitive-button in the segment creator:



Case-sensitivity means that Userlane treats uppercase and lowercase letters as different characters, so "Manager", "manager", and "MANAGER" would be considered three distinct words.

Further Considerations

- Direct links or integrated Guides do not follow user segments.
- Create test segments before going live for in-depth testing.
- Applying a segment to a Chapter affects all Guides.

Page segments for context-based content

Last Modified on 10.01.2024

About page segmentation

Page segmentation lets you show content types or track task success only on specific URLs.

> **Note:** You can find below a list of page segment rules.

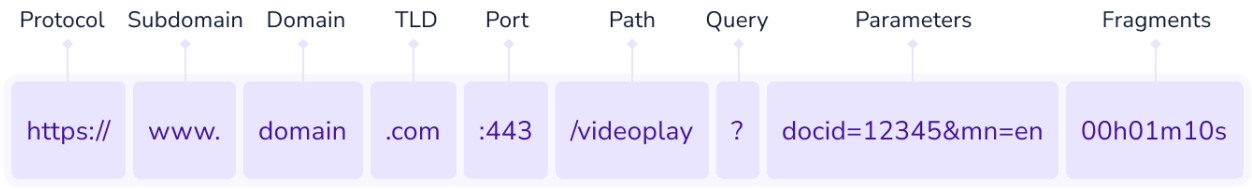
Why use it

The benefits of page segmentation include the following:

- **Targeted Content:** Page segmentation allows you to show specific Guides, tooltips, and tags only on relevant URLs, providing users with content tailored to their needs.
- **Improved User Experience:** By displaying content relevant to a particular section or process, page segmentation enhances the overall user experience, making it more intuitive and streamlined.
- **Easy Customization:** Page segmentation eliminates the need for implementing complex code. For example, you can easily customize and control the visibility of your Tooltips or Tags without requiring technical expertise.
- **Flexibility and Adaptability:** Page segments can be easily created and modified, allowing you to adapt your content to your application's URL structure changes.
- **Enhanced Assistant Experience:** Page segmentation affects the behavior of the Userlane Assistant, including the icon displaying the number of uncompleted Guides, providing users with a seamless and personalized assistant experience.

Understand your problem

You can add any patterns of the URL to the page segment:



To understand which pattern you need, first, create a concept by trying to answer the following questions:

- Should your content be shown everywhere?
  - *Example:* The Userlane Assistant can be hidden on the login page
- Do you want to show specific content per section of the underlying app?

    - *Example:* Show a particular set of guides in the Profile section and another set of Guides in the Opportunity section of your application.
- Are there specific parts of a process that need some further explanations?
    - *Example:* Use page segments if you wish to show specific content on the landing page of a marketing campaign.
- Do you want to test your content before pushing it to the production environment?
    - *Example:* Segment your content to be shown only on the test environment for testing purposes. After, change the page segment of the respective content, and make it available to the production environment.

How to create a page segment

Access page segmentation

Access the Portal to create the page segment: Portal > Segments > Page Segments

Create a page segment

Overall, there are three ways in which you can create a page segment:

- Use path parameters (everything after the first slash "/")
    - *Example:* use *users* to ensure the content is available only in the users section of your underlying app.
- Use (sub)domain name and path parameters
    - *Example:* use *test.mycompany.com/users* when you want to ensure that the content is available only on your test property in the *users* section
- Use (sub)domain name
    - *Example:* assign *customer-id.mycompany.com* page segment to a Chapter with Guides to ensure that only that customer can access the respective content.

You can then decide either to show the content on a page or hide the content on a page.

Advanced cases

There are two functionalities that you can use to customize your page segment further:

- when you have varying parts in a URL between 2 unique parts, you can use asterisks (*) - an asterisk acts as a wildcard. For example: *customer-*.mycompany.com* or *mycompany.com/users=*/profile*
- use the "plus" sign to connect multiple conditions with a logical OR.

> **Note:** Userlane supports asterisks only for subdomains and path parameters.

How to apply a page segment

Depending on the content you wish to segment, you may need to apply it in the Portal (for Announcements, Chapters, Guides, Assistant, Welcome Slide) or in the Editor (for Tooltips and Tags).

Delete a page segment

Segments that are in use can’t be deleted. If you want to delete a page segment, you must remove the applied

segmentation first.

To check if a page segment is in use, access Portal > Segments. In the segments table, you can check whether a content type is connected to a segment with the help of the Usage column.

Page Segmentation rules

The rules can be summarized in the following way:

- subdomain, domain, and domain suffix support for page segments
  - wildcard support for subdomains has been added
  - the domain and domain suffix must be added to the page segment rule. If only one is added (e.g. .com), Userlane will look only at matching path parameters
  - wildcards are not supported for domains and domain suffixes. If you use *mycompany.**, then Userlane will look only at matching path parameters
- The security protocol (https and http), IPs, and port numbers are ignored and not considered in the segmentation rule.
- If you add path parameters after the domain name, the accessed URL must fully match the page segment's rule.
  - if only path parameters are added to the page segment rule (without the domain name), then partial match logic is used.
- If you work only with one domain, you can use only path parameters to segment your content.
  - You can use wildcards for path parameters

Examples: old logic vs new logic

Accessed URL	Page Segment Rule	Previous logic (True / False)	New logic (True / False)	Explanation
https://sub.mycompany.com/id=test1	id=*	True	True	Path parameters (and wildcards) are supported in both scenarios
https://sub.mycompany.com/id=test1	*.mycompany.com	False	True	The subdomain and domain name (including domain suffix) match.
https://sub.mycompany.com/id=test1	mycompany.de	False	False	It is false because the domain suffix does not match (.de vs .com)
https://sub.mycompany.com/id=test1	subdomain.mycompany.com/test1	False	False	It is false because the path parameters should also match.
https://sub.mycompany.com/id=test1	sub.mycompany.com/id	False	True	It is true because the accessed URL matches the page segment rule, including path parameters.
https://sub.mycompany.com:443/id=test1	http://sub.mycompany.com:80/id=test1	False	True	The security protocol and port number are ignored.

Considerations

- Page Segments applied for a whole chapter will affect every Guide within this chapter.
- If you apply another page segment for a Guide within this chapter, the chapter and Guide segment will be connected with a logical AND for this Guide.

- A chapter will no longer be visible on general pages if all the Guides within it are only visible on specific pages.
- The icon in the Userlane Assistant (showing the number of Guides uncompleted in a chapter) varies depending on the active page segmentation. It shows the number of uncompleted Guides in the first uncompleted chapter.

Using tags to define user segments

Last Modified on 10.01.2024

About using Tags for User Segments

If you are about to create your user segmentation, we recommend that you use custom data attributes when you are using a Snippet implementation. You can pass any user information within a custom attribute. Compared to tags, attributes provide more flexibility and data types.

If you still want to use tags for defining user groups, you can implement the following commands to tag and untag users.

ℹ Tags used in the Snippet implementation are different to Tags being set up for HEART analytics. If you want to track a process, please continue reading here.

Dev task: Implement your tags

A tag can be any string. However, we recommend limiting the length to 128 characters. You can use the following tag commands

```
// Tag Command
Userlane('tag', 'admin');

// Multiple Tags Command
Userlane('tag', 'admin', 'exampleTag', 'anotherOne');

// Remove Tags Command
Userlane('untag', 'myCustomTag');

// Remove Multiple Tags Command
Userlane('untag', 'myCustomTag', 'exampleTag', 'anotherOne');

// identify the current user
Userlane('user', 'user_ID');
```

Positioning and page reloads

- Before initializing Userlane with Userlane('init', yourPropertyId), make sure to set all segmentation commands. The 'init' command should be called once, after all segmentation commands, to confirm the changes. This automatically updates the assistant based on tag and segmentation changes. You don't need to call 'init' after each segmentation command.
- Note that tags are not saved when the page reloads. After every reload, users start with no tags. So, you need to call tag or untag commands after each page reload to apply the desired tags.

Manager Task: Create and apply your user segmentation

Learn more about adding custom fields to user attributes and user segmentation.

Segment based on User Behavior

Last Modified on 26.02.2025

About User Behaviour Segmentation

One of the sections in the User Segmentation is Behavioral Data. This group of parameters is based on the User activity related to Userlane in general (First Time, Last Time Active) or on their Guide interaction.

You can use this data to create segments that target specific groups of users and better understand their needs, optimize user experiences, and drive desired outcomes, ultimately improving business performance.

There are three behavioral data settings:

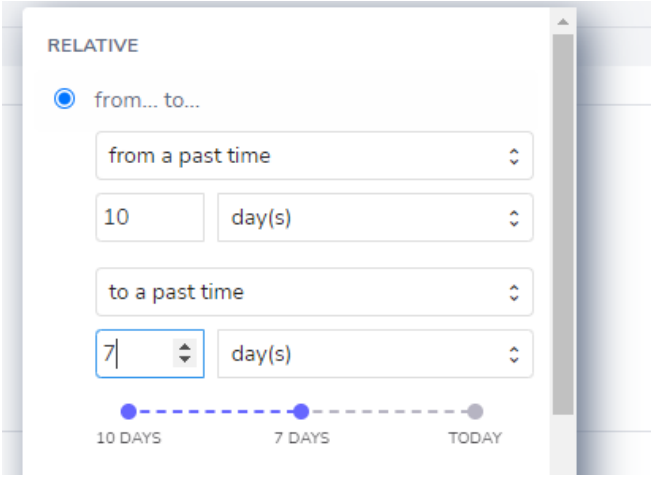
- First Time Active
- Last Time Active
- Guide Interaction

First Time Active parameter

The User segment option allows you to filter users based on their first interaction with Userlane in your app, called "First Time Active." You can use this segmentation to target users who have been active since a specific time or for a certain period.

Options for First Time Active segmentation:

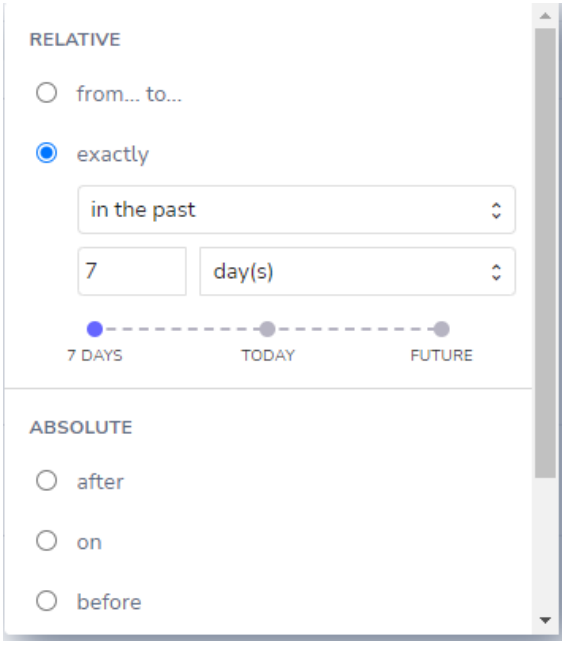
- **Relative time frames**: These parameters are relative to the current time, looking backward or forward. They adjust daily based on the current day.
- **From...to...**: This setting looks at the time difference between today and the selected time, allowing you to choose a time frame longer than one day.
    - **Example:**
      You want to show an Announcement to Users who were activated between 7 and 10 days ago.
      We select the option from a past time - to a past time. We add the days in the fields.
      To illustrate it in a user-friendly way, the time scale below will update with the data you selected.



- **The option "exactly"**: This setting triggers the segment for users whose First Time Active matches an exact day. Content segmented with this option shows for only one day, matching the selected time.
    - **Example:**

      You want to show an Announcement that will congratulate on the first week of the User in the application and promote a Guide that is linked to it.

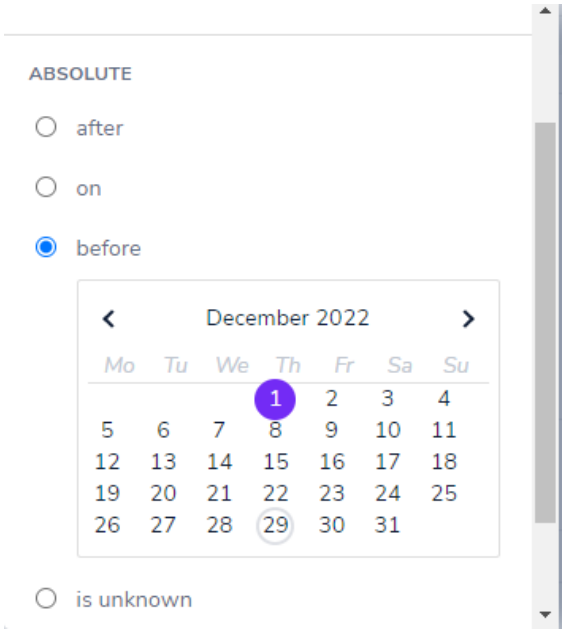
      This Announcement should only show exactly on the 7th day after the first time active. For this, select the option in the past and enter 7 in the day field.



- **Absolute time frames**: This setting selects an exact calendar date or date span when a user was first seen.
- **After, on, before**: These settings filter users based on whether their First Time Active was after, on, or before a specific calendar day.
    - **Example:**

      You want to inform your older Users about a change in one of your processes depicted in one of the Guides. That change will happen on 01.12 and you would like all of the Users who were active before that date to see an Announcement informing about the change and promoting the new Guide.

      You select the option before and set the date to 01.12. This will include only the Users who were first time active before that date.



The settings "**is unknown**" and "**has any value**" should not be used for segmentation purposes but can be used when looking for users with unspecified values.

Last Time Active parameter

The "last time active" parameter is based on the date when a user was last detected by Userlane. This date is updated to the current date whenever the user logs in. It always shows the current date while the user is logged in or the past date when they were last active.

The settings for "last time active" are similar to the "first time active" option, but only the absolute filter is relevant due to the date being updated constantly.

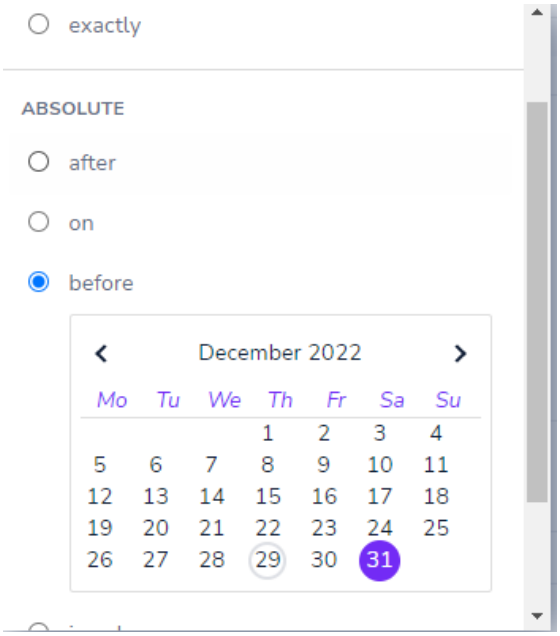
> As the last time active gets updated every time the user is active, it cannot be used with**relative** segment parameters for content segmentation.
>
> You could consider using it though to display a list of users who have not been active for some time and use the relative parameter for that.

Absolute time frames

This setting allows you to select a specific calendar date or date range when a user was first seen.

- **On, after, before:** You can filter users based on their last time active on a specific day (on), and the content will only be shown on that date. By using before and after, you can exclude users who were active before or after a specific date from the segment. Note that this setting works best with current and future calendar dates.
    - Example: To show a guide to users who are active until December 31st because the process will end on that day, select the option "before 31.12" to ensure that users active after that date won't see the

guide anymore.

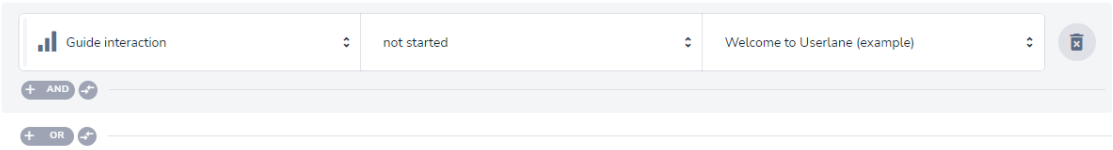


Guide interaction

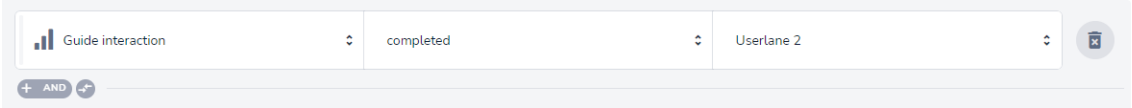
This segmentation option helps filter users based on their interaction with guides. It ensures users complete guides in a specific order by making them available one by one.

Options in this section:

- **Started, not started:** This focuses on users who have either started the selected guide or haven't started it at all.
    - Example: To promote the "Welcome to Userlane" guide to users who haven't started it yet, create a segment for that specific group. Select "not started" and the guide.



- **Completed, not completed:** This creates a segment based on whether a guide has been completed or not, regardless of whether it was started.
    - Example: If users need to complete one task before moving to the next, create a segment of users who completed the first guide before starting the second one. Select "completed" and add the guide it refers to.



Userlane is not showing - Troubleshooting

Last Modified on 21.04.2026

Userlane not appearing is almost always caused by one of a small set of configuration or browser issues. Use this page to identify which one applies, then follow the linked checklist to fix it.

Diagnose the problem

Work through the questions below. Each row shows two possible situations and points you to the right next step.

Question	My situation	Where to go next
Is Userlane active on this page? (See "How to check" section below.)	No — Userlane is not loading	Check that the snippet is implemented on this URL, or that the browser extension is installed and active. Also verify the application URL in Portal → Settings → Application URLs matches the page address.
	Yes — it loads, but something is wrong	Userlane is running. The issue is with content visibility, targeting, or permissions. Continue with the questions below.
Does the problem affect everyone, or just one person?	Just one user	Focus on that user's browser settings, segment membership, SSO login, and extension installation. → Assistant checklist
	Everyone (or no one)	Likely a global configuration issue. Work through the full Assistant checklist, focusing on the Userlane toggle, public language, and chapter settings.
Is it the Assistant (end users) or the Editor (admins) that is not showing?	Assistant not showing	→ Userlane Assistant checklist
	Editor not showing	→ Userlane Editor checklist

Is the problem on every page, or only on specific pages?	Specific pages only	Check page-level segment rules, whether the snippet is excluded on that URL, and whether there are CSP errors in the browser console (F12 → Console) on that specific page.
	Every page	The issue is global. Check the Userlane toggle (Settings → General Settings), the application URL, and whether at least one public language and public chapter exist.
Are there red errors mentioning "Userlane", "CORS", or "Content Security Policy" in the browser console? (F12 → Console tab)	Yes, errors are visible	Your application's security policy is blocking Userlane. Share the CSP allowlist article with your development team.
	No errors	No CSP issue. Continue with the relevant checklist above.

How to tell if Userlane is active on a page

If you are not sure whether Userlane is loading at all, here are three ways to check — ordered from simplest to most reliable.

Method	What to do
Look for the Userlane icon on screen	The simplest check: can you see the Userlane Assistant icon anywhere on the page? If yes, Userlane is loaded. If not, continue below.
Check the browser extension icon (for Browser Extension implementation)	Look at the top-right corner of your browser. Is the Userlane extension icon coloured and active? If it is greyed out or missing, the extension is either not installed or not running on this page — which may mean the page URL does not match the configured application URL in the Portal.
Use the browser console (most reliable)	Press F12, open the Console tab, type window.userlane and press Enter. If you see a function or object returned, Userlane is loaded. If you see undefined, it is not loaded on this page.

User attributes

Last Modified on 24.04.2026

About attributes

Attributes are fields that you can add as optional to your user profiles. They can be filled with data.

In this article we cover

- the benefits
- when to use it
- the implementation via SSO
    - reviewing what data is passed on
    - update the attributes
- the implementation within the Snippet
    - reviewing what data is passed on
    - update the attributes
- the implementation via CSV file upload (Browser Extension only)

Why use it

- **Personalization**: Custom data allows you to tailor user experiences by capturing specific user attributes relevant to your application(s) or the company as a whole.
- **Targeting**: With custom attributes, you can create user segments based on specific criteria, enabling targeted messaging, content, or features for different user groups.
- **Analytics**: Custom attributes help gather valuable data for analysis, allowing you to gain insights into user behavior, preferences, and trends.
- **Automation**: By leveraging custom attributes, you can automate processes or workflows based on user attributes, such as triggering personalized Guides, tooltips or announcements.
- **Flexibility**: Custom attributes provide flexibility to adapt and extend user profiles as per your application's evolving needs, ensuring scalability and customization options.

When to use it

If you want to pass on data to target specific user groups. You can use the attributes to base your User Segments on them.

Before you proceed, make sure you've already planned and created all custom data fields that you will need.

The Implementation via SSO

When deploying Userlane using **SSO (Single Sign-On)**, it is critical to ensure that all **required custom user attributes** (e.g., `role`, `department`, `region`, `language`) are **transmitted via the SAML assertion**.

NOTE: You can create those custom attributes in the Portal in advance & map them while setting up SSO. Otherwise, custom attributes will automatically be created in Portal while transmitting data from IdP the way they presented in there

You can learn more about this here.

Check what Attributes are passed on

Once SSO succeeds, validate that your attributes (`region`, `role`, etc.) are correctly passed and available.

Go to **Userlane Portal > Settings > Company Users.**

Click on a Company User and review what information is passed. If any attribute is missing, please have add it following the instructions here.

Update the Attributes

Updates are tied to SSO authentication events.

Whenever a user logs in via SSO, Userlane fetches the latest attributes from the IdP and updates the profile.

To control frequency, you configure the SSO Refresh Interval in the Portal:

- Disabled (no refresh)
- Daily (24h)
- Every other day (48h)
- Weekly (7 days)

This interval determines when already-authenticated users will have their attributes re-synced.

The Implementation within the Snippet

1. Your general Snippet

Every account has a unique account ID which is also included for the Java Script snippet to load Userlane within an application. This can be found in the Userlane Portal.

2. Know where to amend the Snippet

To amend the snippet to save data in the user profile of the current user, you need to add an identify command

in the snippet:

```
Userlane('identify', currentUser.id, {
  attribute_key: 'attribute_value'
});
```

Example snippet:

```
// load Userlane

(function(i,s,o,g,r,a,m){i['UserlaneCommandObject']=r;i[r]=i[r]||function(){ (i[r].q=i[r].q||[]).push(arguments)};a=s.createElement(o), m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m) })(window,document,'script','https://cdn.userlane.com/userlane.js','Userlane');



// TODO: the command below is just for illustration purposes
// it's definition must be changed to work for your application

var currentUser = please_replace_this_with_your_api_call.getCurrentUser(); // returns an object with id and other data of the current user who’s using the application in this moment



// identify the user for Userlane

Userlane('identify', currentUser.id, {

 // TO DO: these fields below are defined by you.
 // Below are just examples. You must individually customize your own attributes and variables here.

 name: currentUser.name,
 email: currentUser.email,
 permissions: currentUser.permissions
});



// initialize Userlane with your account ID, in this example it is “12345”
Userlane('init', 12345);
```

3. Decide which custom field data type to use

Every custom field has a data type. It can only accept data that fits this type. These types are defined when the custom data field is first created and can not be changed afterward.

> Attribute values are limited to a maximum of 5,000 characters.

Supported data types:

- **True/false:**

Custom true/false fields accept JavaScript booleans. We also parse values like 1, 0, “yes” and “no” to their respective true/false value.
Example:

```
Userlane('identify', currentUser.id, {
  is_admin: true
});
```

- **Text:**

  Custom text fields accept JavaScript strings. There is no length limit on individual strings but all custom data may not exceed the size of 500kb.
  Example:

```
Userlane('identify', currentUser.id, {
  description: 'Some text description'
});
```

- **Number:**

  Custom number fields accept JavaScript numbers, both integers and decimals/floats.
  Example:

```
Userlane('identify', currentUser.id, {
  store_number: 224
});
```

- **Date and time:**

  Custom date and time fields accept strings that represent a timestamp in any of these formats:

• YYYY-MM-DD HH:mm:ss	• 2017-04-28 20:12:55
• yyyy-mm-ddThh:mm:ssZ	• 2017-04-28T20:12:55Z
• yyyy/mm/ddThh:mm:ssZ	• 2017/04/28T20:12:55Z
• yyyy-mm-dd	• 2020-02-20
• yyyy-mm-dd hh:mm:ss	• 2020-02-20 23:42:51
• yyyy/mm/dd hh:mm:ss	• 2020/02/20 23:42:51
• yyyy/mm/dd	• 2020/02/20

Example:

```
Userlane('identify', currentUser.id, {
  date_created: '2020/02/20 23:42:51'
});
```

- **Array** (List)**:**

  Custom list fields accept JavaScript arrays. We only accept string and integer elements in the array. The

order of the elements in the array is not considered. When a new array is provided, we'll override the previous array entirely.
Example:

```
Userlane('identify', currentUser.id, {
 roles: ['admin','editor','user']
});
```

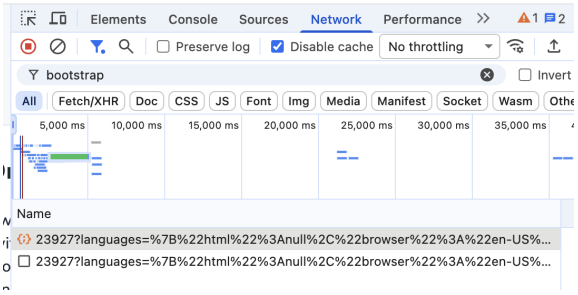
ℹ An Attribute that is passed via the snippet but has not been set up in the Portal will be ignored by Userlane. This also applies to Attributes that have a different name in the snippet and in the Portal.

After creating the Attributes, you can create a User Segment you can then apply to specific Userlane content.

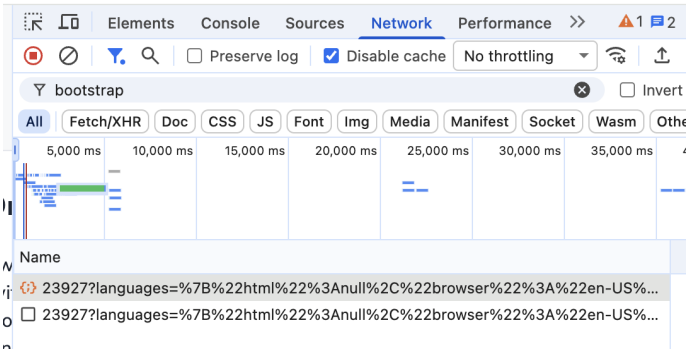
Check what Attributes are passed on

When you already implemented the Snippet, you can check in the Developer Tools what information is being passed on.

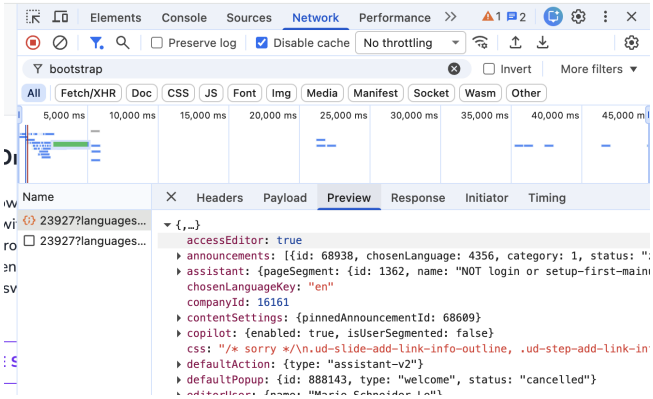
1. Open the Developer Tools and navigate to the Network tab
2. Once in the Network tab, enter 'bootstrap' in the filter:



3. After entering 'bootstrap', refresh the page to re-trigger the Userlane commands
4. Then you will find two languages options under the 'Name' column, click to open



5. Upon opening, you will be able to see the implemented attribute keys as well as their values for your users in the ‘Payload’ tab under customerUser/customData



Update the attributes

With the Snippet, attributes update whenever your application sends a new `identify` call, so it is entirely dependent on what information is being passed on via the Snippet.

The implementation via CSV file upload (Browser Extension only)

If you want to upload the CSV file with the list of your users and their data you can pass user data such as: `region` , `role` , `department` `jobtitle` , etc. as custom user attributes.

In order to start you should upload CSV file with your users and map users data from the file onto the custom attributes available in Portal. More info on how to upload CSV file you can find here.

NOTE: you can add missing custom attributes right while mapping data from CSV file onto Portal attributes or add custom attributes in advance

If you want to update any attribute, you have to upload an updated CSV file.

Userlane Analytics

Last Modified on 12.01.2024

Measure, understand, improve

By measuring and tracking the **success of strategic software** adoption, you can expect the following results:

- Increase usage & adoption
- Improve employee experience
- Reduce underused software
- Increase productivity

Additionally, you can track the performance and engagement of your support content, so you can iterate faster and drive further software adoption.

HEART Analytics

Userlane's HEART analytics are the world's first standardized model to monitor value realization across enterprise applications.

Based on user interaction metrics and usage patterns, a single score indicates the current value realization for each application based on five core value drivers:

1. Happiness
2. Engagement
3. Adoption
4. Retention
5. Task Success

The output metrics signal if an application delivers the expected value and allows identification of areas for improvement to assess and optimize the return on investment for key technology initiatives.

Learn more about HEART Analytics here.

Content Analytics

Userlane improves user experience with an interactive overlay for in-application guided learning to drive adoption and productivity while reducing training and support costs.

You can create **Guides, Tooltips, Announcements, Pop-Ups (Welcome Slide), and NPS** with Userlane and see how they are performing.

Learn more about our Content Analytics here.

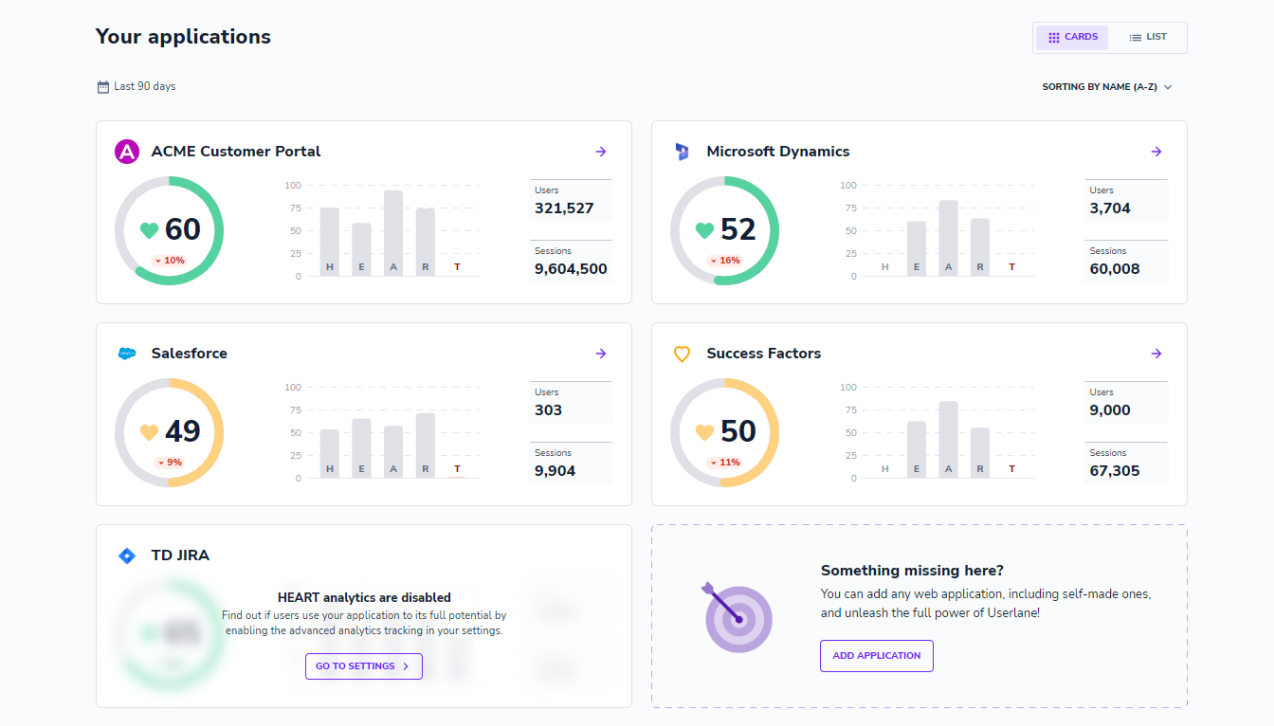
HEART Analytics

Last Modified on 21.09.2025

HEART Analytics

Uselane's HEART Analytics offers you deep insights into the usage and value of your software investments. Using the HEART framework, Userlane can show you where your users are experiencing digital friction in a given application and how to address it proactively.

HEART is a user-centered metrics framework that Google developed to evaluate the quality of user experience. At Userlane, we adopted and adjusted the framework for the world of B2B enterprise SaaS applications so that you can measure digital adoption across your entire software stack with ease and precision.



Why use HEART

The HEART framework is comprised of 5 letters that each track a different metric in order to give you both comprehensive as well as detailed insights into the status of your digital adoption. The screenshot and table below provide you with a visual and in-depth explanation of the individual letters, respectively.

Each letter allows you to dive into a particular aspect of digital adoption and better understand where your users are struggling and how you can help them. You can leverage the Userlane Improve Suite to create impactful, in-app content to assist and support your users or engage with your Userlane CSM to brainstorm internal campaigns. The goal of HEART is to enable you to identify areas of digital friction and make data-driven decisions about how to address them.

Each **HEART** letter focuses on a different pillar of digital adoption and user experience as described below:

	Goal	Metrics	

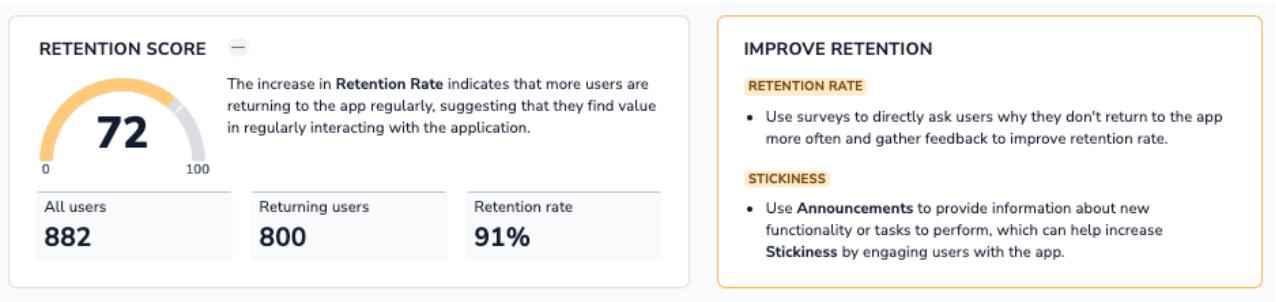
	Goal	Metrics	
"H" - Happiness	Users are satisfied with the application and are likely to recommend it.	NPS and Survey responses	Read more
"E" - Engagement	Users interact with the application actively.	Engaged sessions Average session duration	Read more
"A" - Adoption	Users come to the application and utilize it broadly.	Users Growth Rate App Coverage	Read more
"R" - Retention	Users keep coming back to the application.	Retention rate Stickiness	Read more
"T" - Task success	Users accomplish their Tasks.	Tasks interaction	Read more

 After enabling HEART, interaction events will appear quickly. However, to ensure that all score dashboards stabilize and provide meaningful insights, it may take up to one month for the score results to settle.

AI-Powered Insights for HEART

HEART also includes AI-powered insights to help you quickly and easily digest the data. AI does the hard work for you of processing the data and provides you with two types of meaningful insights for each letter:

- Summary:
  - To the right of the overall letter score, you will find an AI-generated summary that interprets the trends and changes in data for that score and gives an indication of the significance or meaning of those trends.
- Recommendations:
  - To the right of the summary, you'll find an 'Improve' section when the scores for that letter are low.
  - Here the AI evaluates the scores and recommends actions you can take to improve both the overall letter score, as well as the more granular metrics.



How are scores rated?

To calculate whether a score is **Low**, **Moderate**, or **High** we employ a benchmarking algorithm that aggregates all HEART letter scores and breaks them down into quantiles that represent the is **Low**, **Moderate**, or **High** ranges.

How to enable HEART?

To enable HEART for your application, navigate to **Settings > Analytics Settings** and turn on HEART for all or just some applications. This is also where you can disable HEART if needed.

⚠ If you go to **General settings** and disable the "Switch Userlane on/off" toggle, HEART will be disabled as well as the Userlane assistant!

Analytics privacy settings - Basic and Advanced (HEART) analytics and Application discovery

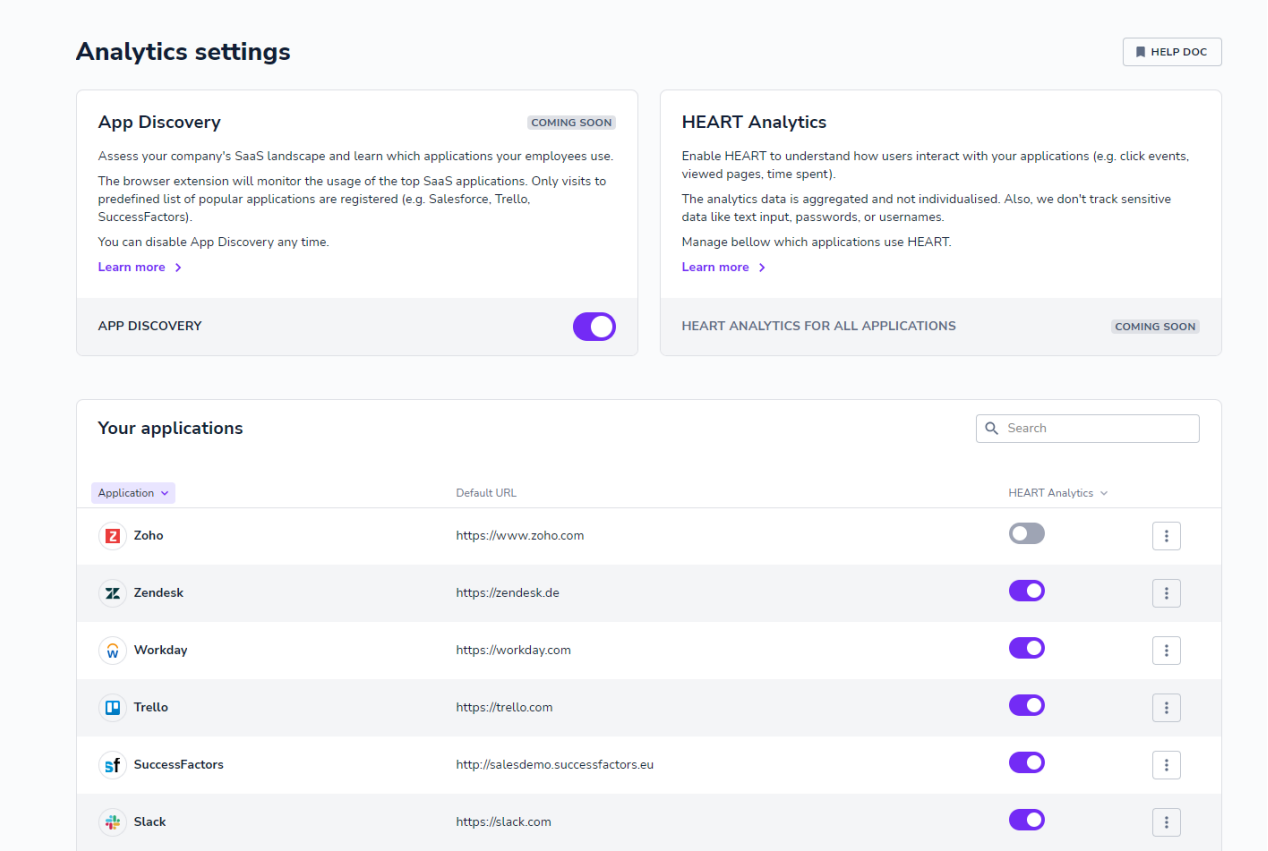
Last Modified on 13.05.2026

About the Analytics settings

Our analytics privacy settings enable you to select the level of event tracking that you need to help you understand well your applications are being adopted. In these settings you can manage what **applications use HEART analytics** if your company is using the **App Discovery option**

To find this settings follow these steps:

1. Click on the Settings icon in your navigation in the left sidebar.
2. Under the Global settings go to "Analytics" and you will be on the Analytics settings page.



How do we process the data?

The raw events are stored in our servers and used to calculate aggregates that help you improve your Userlane content. All the data collected is in accordance with our Data Processing Agreement (DPA).

HEART analytics

Enable HEART to understand how users interact with your applications (e.g. click events, viewed pages, time spent). HEART analytics allows you to track your application's Adoption, Retention, Engagement and Task success metrics.

> ℹ **Good to know**
> - Userlane **does not** track user inputs (what a user types in the text field), only the general activity events.
> - If you have enabled an integration to a knowledge base or other enterprise system, we only track search activity in the Assistant; not interactions with the content or the host application.

Set it up

1. On the settings page, you will see a HEART toggle in the Table next to your applications.
2. **HEART analytics tracking:** Track interactions with anonymous event tracking for your underlying app.
3. **Basic tracking:** If you do not select the HEART option, your application will be on the "Basic" tracking option that tracks interactions with Userlane only.

These analytics options are available in both our browser extension and snippet integrations. They work on multi- and single-page applications, though the raw events generated around page navigations might differ. This difference affects only how we will calculate the HEART metrics, and does not affect any Userlane or host application functionalities.

Basic tracking (Default)

What do we track?

If you do not want HEART analytics, our **Basic** anonymous event tracking captures interactions with Userlane such as a Guides started, Assistant opened, or Announcement viewed.

What does the data show you?

Calculations from the data are available in Userlane's Analytics dashboard reports. They represent insights such as completion rate and conversation rate. Reports are provided for Guides (with step analysis), Announcements, and the Welcome Slide. You can use these insights to improve your content and how you deliver it.

Advanced HEART tracking

What do we track?

In addition to our Basic event tracking, Advanced tracking captures interactions in your underlying applications including clicks, URL changes, and URL views. A detailed list is provided below. When enabled, this option records raw events for tracked user interactions, regardless of whether any other Userlane feature is enabled, e.g. Guides, or Announcements.

HEART tracking events

User Interaction	Example HEART event sent to Userlane
A user loads the application by the browser Back or Forward buttons	`"action": "back_forward"`

User Interaction	Example HEART event sent to Userlane
A user loads the application by any other means (clicking on the application URL elsewhere, copy-pasting the application URL in the browser address bar)	`"action": "navigate" ;` `"action": "loadPage"`
A user reloads the application by clicking the browser Refresh button	`"action": "reload"`
A user clicks an element in the application	`"action": "click"`
A user clicks on the Tagged element in the application; User interacted with an Action within the defined Task (Task success).	`"action": "interaction"`
A user right-clicks an element in the application	`"action": "rightClick"`
The browser tab containing the underlying app becomes **inactive** (because the user switches to a different tab)	`"action": "hideAppWindow"`
The browser tab containing the underlying app becomes **active** (because the user switches tab)	`"action": "showAppWindow"`
A user changes URL on a single-page application (via application router or manual change in the browser address bar)	`"action": "changeUrl"`
User responded to the NPS or survey	`"action": "response"`

URL exceptions for HEART events

Userlane will track data on URLs that are added in the Userlane Portal section *Application URLs* . If you want to prevent tracking on a specified URL, you can add it to the exceptions list:

- Click on **three dots** icon next to the application in the Table
- Go to the **Manage Exceptions** then click **Add Exception**. Use the Manage Exceptions page to add and remove URLs to the exception list as needed.

How do we process the data?

The raw events are stored in our servers and used to calculate aggregates that help you improve your Userlane content and understand how well your application is being adopted. All the data collected is compliant with our Data Processing Agreement (DPA). Advanced tracking relies on cookies saved on the host application under `userlane.com` domain name. The use of this cookie is declared in here.

What does the data show you?

Calculations from the data are rendered in Userlane's Analytics dashboard reports. Our HEART analytics provides insights for your underlying application to help you evaluate how well your application is being

adopted and where you can improve engagement.

Limitations

- **Browser compatibility**

On modern browsers (see browser compatibility), Userlane analytics also distinguish when browser window buttons are used to load or navigate to the host applications. On incompatible browsers, we do not distinguish *how* the host application is loaded, but we do track when the host application is loaded.

App Discovery tracking

Enable App Discovery to identify and discovery the applications your employees utilize throughout your company. Learn more about how this feature works in this article.

- **Do I need to enable App discovery for all my applications or once per company?**

App Discovery is company-level tracking, unlike HEART, where you need to enable it for each of your applications

- **When will tracking work for App discovery?**

If App Discovery is enabled the Userlane browser extension will monitor the usage of the top SaaS application when:

1. The user has the Userlane browser extension installed.
2. The user is registered as a Company user inside your company.
3. Only visits to top SaaS apps are being tracked.

- **What apps are being tracked?**

App Discovery does not track every page your user visits. It only registers visits to the predefined list of top SaaS applications (e.g. Salesforce, Jira, Trello, SuccessFactors). You can check the list of tracked applications here: Top SaaS apps included in the App discovery.

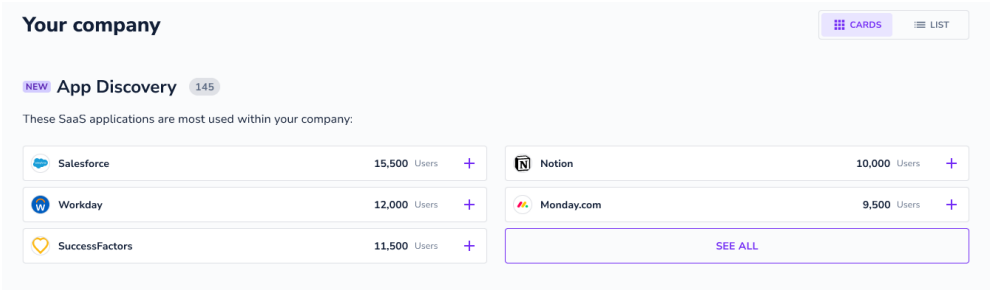
In the future, this list may expand to include additional SaaS applications, but it will strictly contain work-related tools. It will not track websites that your employees might access during their personal time.

- **Once I am using the App discovery, can I turn it off?**

You can opt in or opt out of using App discovery for your company at any time in your Analytics Settings.

- **What metrics can I see in my dashboard?**

The metric you receive through App Discovery for is the total user count for all your discovered applications. This will help you in identifying which applications get traffic within your organization.



In the future, we may also consider including session numbers as part of this data.

- **Can I see which user visited the discovered application?**

No. That this data will not reveal the identities of individual users. In your dashboard, only the total count of users who have visited each application will be displayed.

- **How does the event look like?**

This is how the event passed on to Userlane looks like if the company user visits one of the apps from the tracked SaaS list:


```
{"data":[{
 "subject": {
  "key": "companyUser",
  "value": "49024680",
  "display": "any"
 },
 "action": "urlMatch",
 "dirObj": {
  "key": "application",
  "value": "<html>"
 },
 "prepObj": {
  "key": "button",
  "value": "primary"
 },
 "context": {
    "appId" : "app",
  "sessionId": "21012q4eedohlfqtvywu",
  "chosenLanguage": "en-en",
  "appSessionId": "6112027536a23-f3fe-4df6-8801-39841003f9d2",
  "appPageVisitId": "701122234e4e1-4e75-475d-b9fa-bf7e756d4bd8",
  "appUrl": "https://family.userlane.com/app/8mp77/analytics/overview",
  "userAgent": "Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/111.0.0.0
Safari/537.36",
  "viewportHeight": 929,
  "viewportWidth": 1920
 },
 "companyId": "4",
 "propertyId": "qwx0dk46vz",
 "clientUuid": "402a4def40-11b7-462e-aaa3-c20a2be0201e",
 "clientTimestamp": 1679921768826,
 "version": "2"
}]}
```

H - Happiness

Last Modified on 30.03.2026

About Happiness

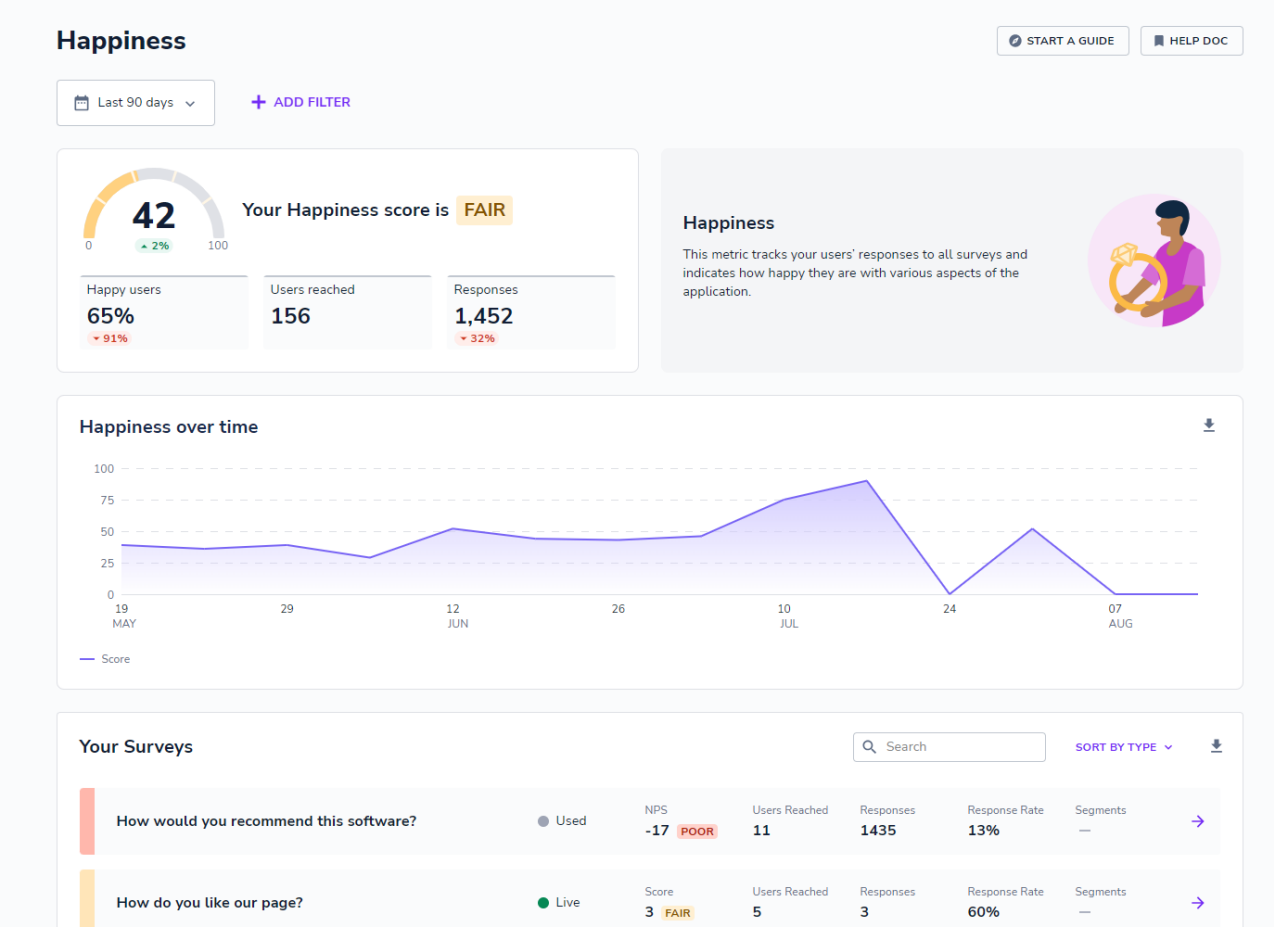
Understand how users feel about your app with our Happiness tool. You can monitor this by utilizing either our Net Promoter Score (NPS) or Surveys. The NPS measures user loyalty by asking about the likelihood of users recommending your application. With Surveys, you have the opportunity to go deeper into user satisfaction regarding your application and its features.

> ℹ The Happiness factor will not be included in the overall HEART score unless NPS or Surveys are activated. If only one of these options is activated, then only the corresponding score will contribute to your H score.

Why use it

Employee Happiness is a crucial indicator that provides insights into productivity. When employees are frustrated, they are less likely to engage with an application and may decrease their efforts to the minimum.

A high Happiness score significantly affects your business results by resulting in higher productivity, lower costs associated with employee motivation, and an elevated employee retention rate.



How is it calculated?

"H" score	(Surveys AVG score * #Survey responses + NPS * #NPS responses) / (#Survey responses + #NPS responses) Survey AVG score and the NPS score are both normalised in range [0,100] NPS is normalised from [-100, 100] to [0, 100] like this: (NPS+100)/2
Happy users	happy users (NPS promoters and unique users that responded to Survey with 4 or 5)/ all reached (unique users reached)
NPS score	(promoters - detractors) / all responses
Survey score	AVG of all Survey scores

Best Practices

Here are our Tips for Happiness:

1. Consider our recommendations when setting up your NPS Survey

You can find our tips of what to consider here.

2. Read user feedback

Review the feedback provided by users.

3. Conduct user research

Conduct a follow up survey or interview session to better understand the why behind the feedback. Initiate a user testing session to uncover usability flaws.

Do not only focus on Detractors but also Passive ones, so you can have dedicated sessions to better understand their needs and expectations.

4. Improve the experience

Users often become dissatisfied when they lack understanding of a tool. To address this, ensure communication about the importance of a tool and the NPS survey within the company is clear and consistent.

You may also provide helpful Guides and Tooltips, use announcements and integrations to drive engagement with the application. If necessary, prioritize reducing bugs or improving user experience in areas detractors complained about.

Additionally, also review the NPS setting to ensure that the original question, timing and audience was correctly chosen.

E - Engagement

Last Modified on 09.10.2023

About Engagement

Engagement show your user's involvement by tracking how many engaged (meaningful) sessions they had and how much time they spent in your application or on a certain page.

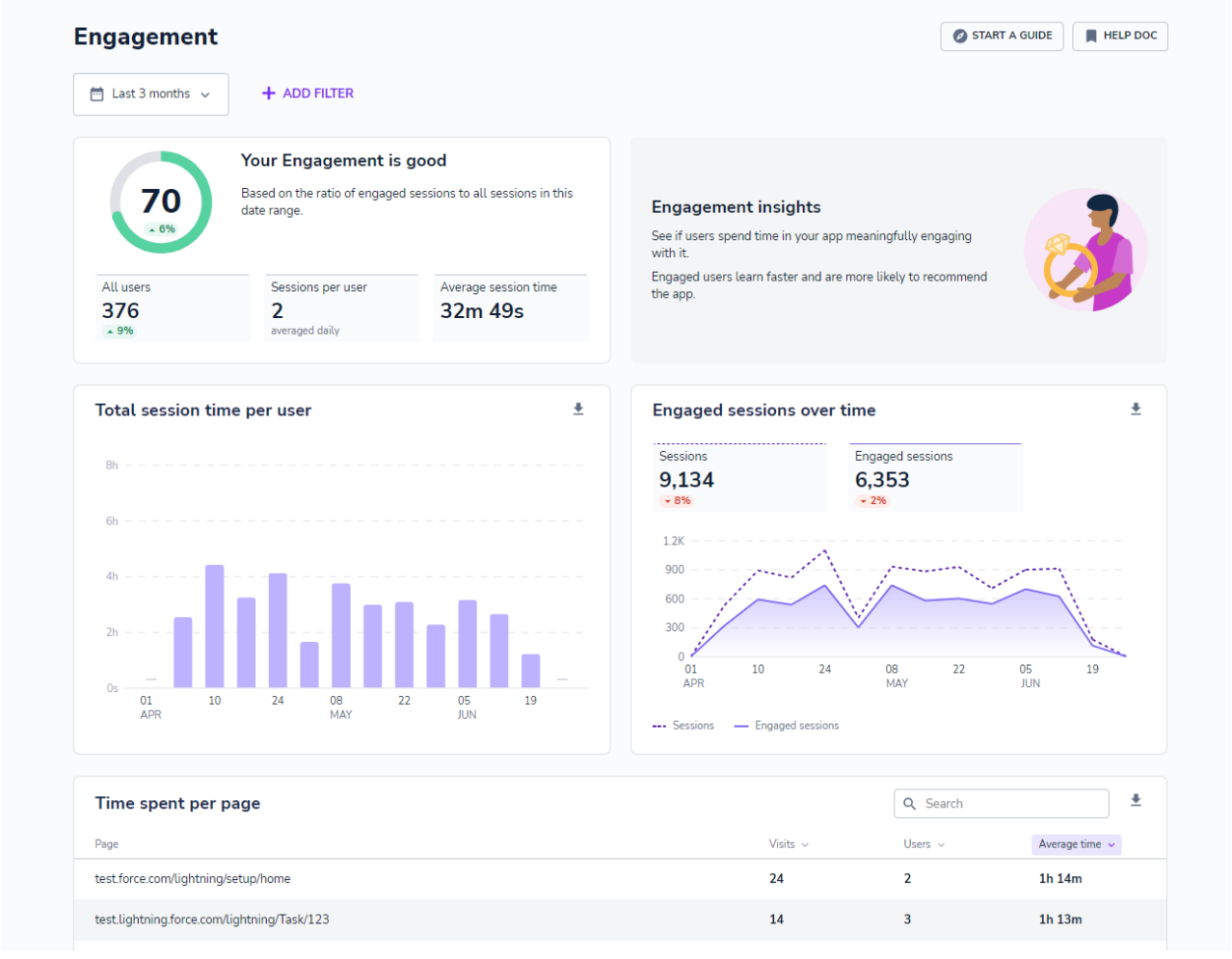
Why use it

You will learn if users engaged with your application or if they just opened it briefly and left without any action. Engaged users tend to learn faster, have higher chances of returning, and are more likely to make purchases.

By analysing the average time users spend in your application and its various sections, you can understand for how long the application was interesting to your users and if this improved over time.

Low engagement can indicate that your application attracts traffic, but users tend to leave without actively interacting. This can help identify opportunities to reduce costs by scaling down licenses or uncover potential areas for improved efficiency through retraining your users.

On the other hand, high Engagement score could be a positive indicator as your users are more likely to engage and explore your application. This can have an impact on your business results and higher application ROI.



How is it calculated?

E Score	Percentage of Engaged sessions (Engaged sessions / all sessions) * 100
Sessions number	Total number of sessions
Engaged sessions	An engaged session is a session that lasts more than 10 seconds and/or has more than 3 clicks or other activity events, such as a page change.
Sessions per user	Average session number per user in the selected time frame.
Average session time	Average duration of all sessions in the selected time range. It excludes the sessions that lasted 0 seconds.
Total session duration over time (Bars)	Average (cumulative) time spent in the application in the date interval averaged per user.
Average time on page (URL table)	Average duration of all visits to a URL in the date range.

Best Practices

Tips for improving your Engagement:

1. Learn what or who drives the engagement

Understand where your users are spending the most or least time by going trough the URLs. Additionally, comparing the Engagement metrics across different user segments allows you to identify groups with higher or lower levels of engagement.

2. Review and understand

Review the content and features in the areas that do not drive engagement. Additionally, asking your users about these areas will help you understand why they were not interesting.

3. Engaging content

Use Announcements or Beacons to promote important parts of the application that are not driving the engagement. Create Guides to explain the areas that your users avoid to interact with.

4. Consider alternatives

If an area is not being used, consider removing it. Similarly, if there is a group that doesn't require the software, reduce the number of licenses for that group, if possible.

A - Adoption

Last Modified on 30.08.2024

About Adoption

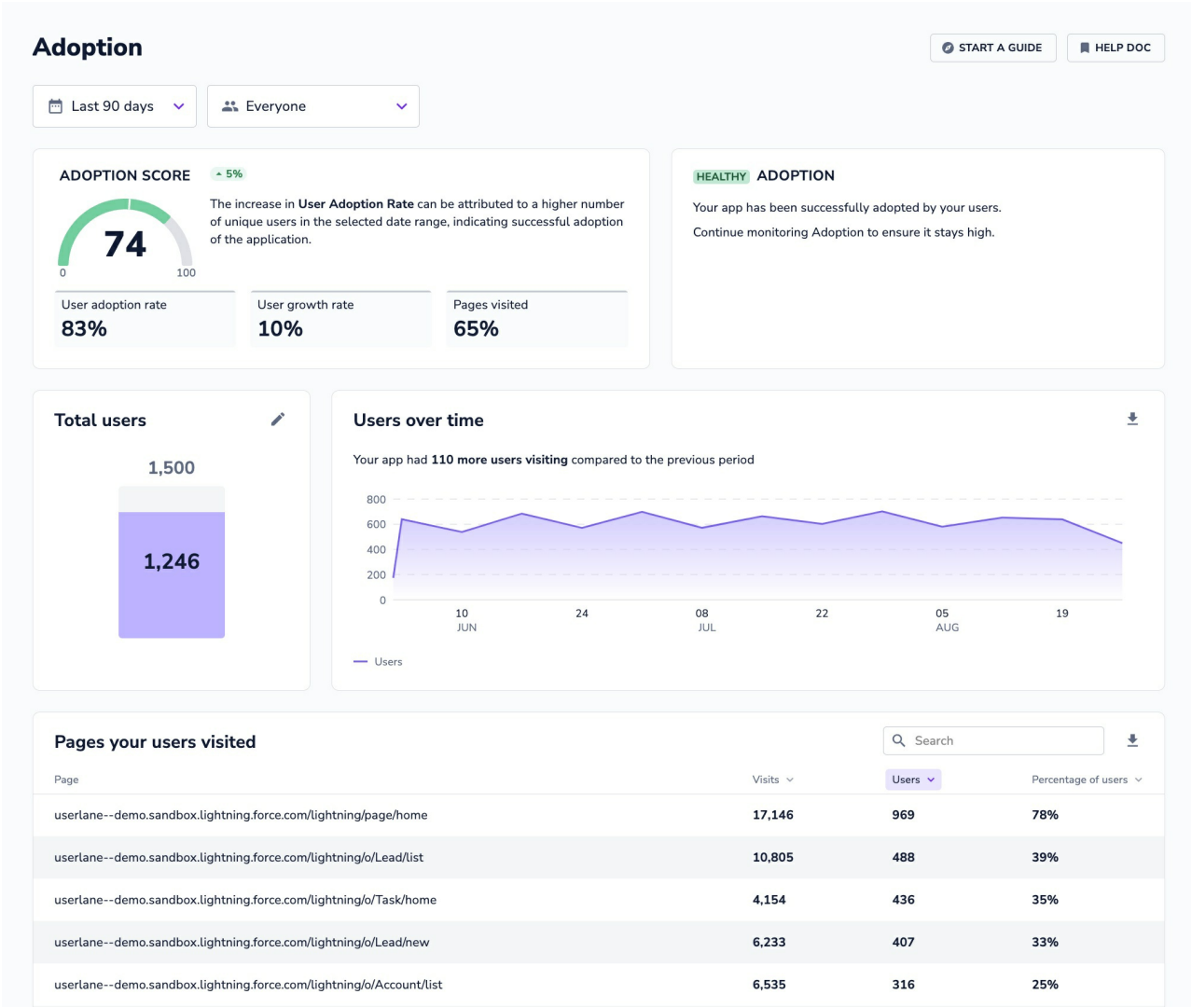
The goal of any application is that (expected) users are coming to it and that they use it widely. The user number is the key metric you need to measure. With the Adoption Score, you can see how many users arrived and you can track this number compared to the ratio of the expected number of users.

Why use it

Adoption signals the extent to which an application is used. You will be able to understand if your users are declining or if they are remaining stable or growing. Also, with this metric, you will be able to understand which pages of your application have been visited and how widely users use it.

A low adoption rate means that users are only working with a limited part of an application, leaving significant potential for additional productivity untouched.

A high Adoption Score has a big impact on your business results such as a higher app ROI and higher productivity.



How is it calculated?

Adoption score	Average of Pages Visited and User Adoption Rate
Smart Insights	More specific information on how good or poor your Adoption Score is, which provides you with a clearer and quicker overview of where your application stands currently, and what steps you can take to improve its overall health
User adoption rate	Ratio of unique users in the selected date range to expected users
User growth rate	Ratio of the difference between unique users in the selected time range and users from the previous period over users from the previous period
Pages visited	Ratio of unique pages visited in the selected date range to unique pages visited all time

Total users	Total of unique users in the selected date range to expected users Add the expected number of users as a user goal, so you can track the adoption. This could be e.g. based on the amount of licences you have for an application. You can change the user goal at any time.
Users over time	**Number of unique users in the selected date range**
Pages your users visited	An overview of the pages visited along with the number of visits and unique users

R - Retention

Last Modified on 30.08.2024

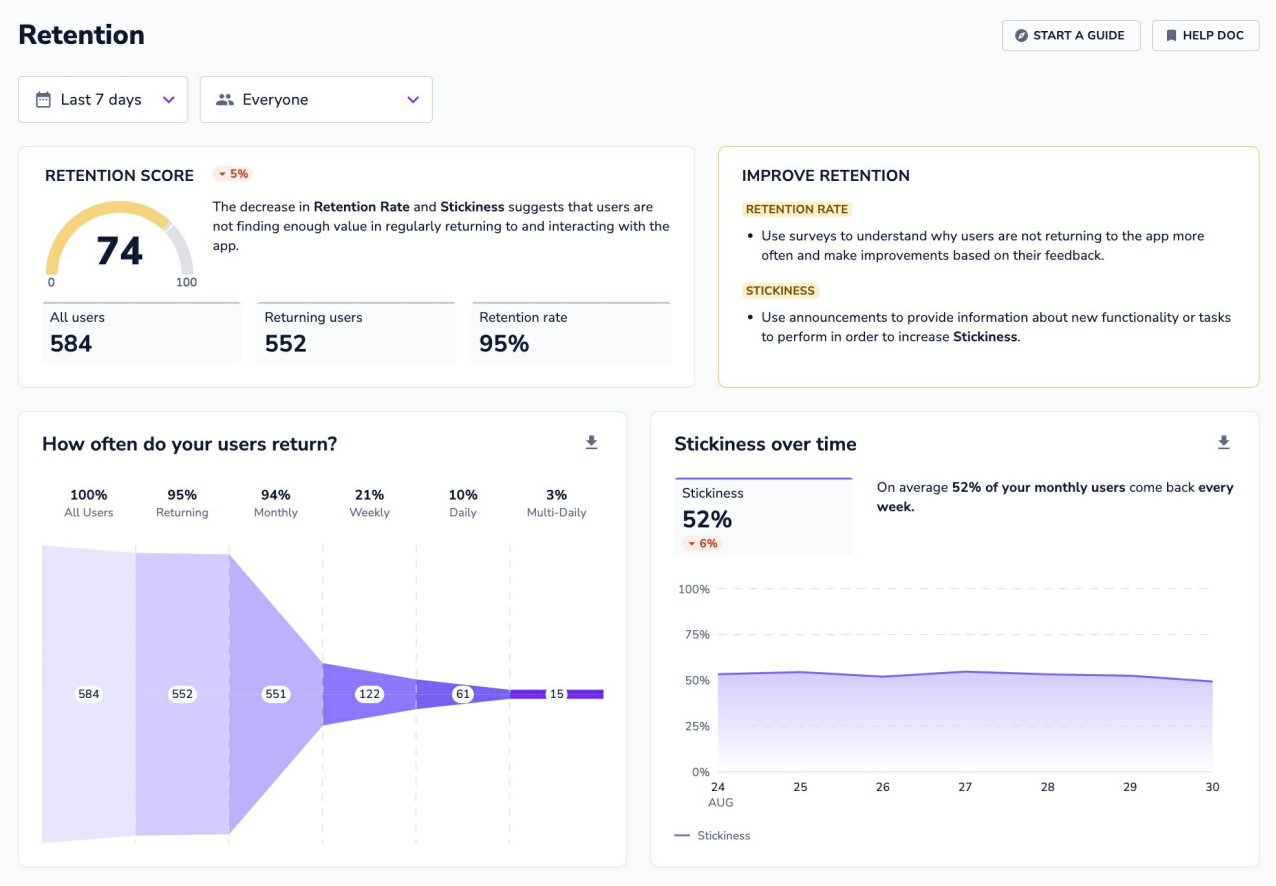
About Retention

The retention score is a measure of how many of your users are coming back to your application.

Why use it

Users will continue using an application and repeatedly return to it if they find value in it.

A low retention indicates that users might not see value in interacting regularly with an application or struggle to achieve the intended usage. On the other hand, a high Retention Score significantly impacts your business results, leading to a higher return on investment (ROI) for your app.



How is it calculated?

Retention score	Average of the Retention Rate and Stickiness
Smart Insights	More specific information on how good or poor your Retention Score is, which provides you with a clearer and quicker overview of where your application stands currently, and what steps you can take to improve its overall health

Returning users	The metric compares the number of users who returned to the application during the selected period **with the users from the previous period.**
Retention rate	Ratio of returning users to all users (compared with the previous period).
Stickiness	Average daily stickiness **in the selected date range** in the date picker. Daily stickiness is the ratio of Weekly Active Users to Monthly Active Users on that day (WAU/MAU)

Funnel "How often do your users return"

Based on your selected time range in the date picker, we take all returning users and classify them into monthly, weekly, daily, and multiple times per day groups (Multi-Daily). We look at the last 90 days (or since the user's first session) and calculate the number of sessions, days, weeks, and months they returned.

Returning	The user has returned at least once within the selected timeframe
Monthly	The user was active 2 out of 3 months
Weekly	User active 75% of weeks in this period (about 9 out of 12)
Daily	A weekly user that's also active >40% of the days in this period (about 3/7)
Multi-Daily	A daily user that has more engaged sessions than days

The warmup period

Keep in mind, that some retention metrics require a **warmup period:**

- Stickiness compares weekly to monthly active users. In the first 2-3 weeks HEART does not know the number of your monthly users, so stickiness will be higher than usual.
- Your Retention rate compares users with the previous period, so if there is no data in this period, retention will appear higher in the beginning.

Limitations

HEART may encounter difficulties in accurately assessing returning users in these scenarios:

- **When users switch devices:** HEART relies on the browser to determine if a user is returning, either using cookies or through the Browser Extension
- **Cookie-related problems:** For instance, if a user's browser blocks or restricts cookies, it can hinder the ability of HEART to identify them as returning users accurately. Using the SSO to identify the user is a good way to mitigate the issue.

Best Practices

To get the most value in understanding and improving the Retention numbers, we suggest monitoring the numbers for at least 1 month.

Here are our Tips for Retention:

1. Define user groups

There might be different expectations for different users on how often they should be returning to which application or page. Define those user groups and create user segments, so you can better analyze the data.

2. Understand why

Conduct user research to understand why users are not retaining. How much value do people get from the application? What is the application being used for?

Understand whether there might be roadblocks in using the application. Something might be broken that keeps people from coming back / creates frustration.

3. Improve onboarding

Send users an email to invite them into your application and highlight the values of it.

4. Awareness and promotion

Send a reminder over email or other internal channels.

5. Check for limitations

Check if your system is restricting cookies from the user's browser.

T - Task Success

Last Modified on 05.11.2025

About Task Success

The Task Success page helps you measure whether users complete Tasks successfully and how easily they interact with important features in your application.

With Tasks, you define a complete workflow (e.g., filling and submitting a form, creating a lead, or uploading a document). Using Tasks and Tags together allows you to understand:

- What percentage of users are completing key workflows?
- Where is the biggest user drop-off in defined workflows?
- Are the most important parts of your app being used successfully?
- How many users interact with and finish your most important features?

The individual Task page helps you see how users complete a specific task, action by action. On the individual Task page you can see where the biggest Task drop off happened.

> Unlike the old version (where only Tags determined the Task Success Score), the updated framework now measures end-to-end flow completion. Tags can still be tracked for individual element usage, but they no longer contribute to the Task Success Score.

Why use it

Task Success shows interaction with your Tasks and tells you if users are able to complete predefined processes from start to finish.

- A low Task Success Rate signals friction, broken processes, or potential usability issues. Fixing these can reduce support requests and improve productivity.
- A high Task Success Rate indicates smooth user experiences and has a big impact on business results (for example, higher productivity, lower friction and fewer errors and mistakes in Task execution).

How is it calculated?

Sessions that had interactions with Tags / all engaged Sessions = Task Success Score

Task Success Score	Completions ÷ Starts × 100
Start	When a user performs the first step of a defined task.
Completion	When a user reaches the last step in the same session (regardless if the middle actions are done or not).

Abandoned	User starts but does not complete the Task.
Average time to complete	The **average time to complete** is calculated only for completed Tasks and represents how long it typically takes users to finish from start to end.
Biggest drop-off	Most common part of the Task after which users stopped moving to the next step.

In order to calculate these metrics, every Task has a unique Task session ID. Task session starts when the first action is triggered and ends either when the task is completed or after 30 minutes of inactivity when the session expires.

Middle actions are optional, if a user skips them but still completes the Task, it's still counted as a successful completion.

Best Practices for defining good Tasks

- Choose a clear **start point of the Task**, such as when a modal or key element **loads** that suggest the Task is started, rather than when a user loads Home page or the page where user goes to do multiple things.
- If multiple elements can start the same task (e.g., several buttons open the same modal), use the most common element that indicates start event, like loading a modal.
    - Identify the **most common starting point** with **Tags.** If you have several elements that can start the same Task (for example, three different buttons across your system that all open the same *Create Lead* modal), currently it is not possible to have multiple starts of the Task. However, you can you **tag each of those starting elements separately using Tags** In your **Tags page**, you'll be able to see which element users interact with the most.
- Define **completion** by a true success indicator, for example, a **success message load** or **confirmation screen**, not just clicking "Save."

Troubleshooting low completion rates:

- If a Task has many starts but **zero completions**, check the **final action,** it might be something like a *cancel button* or an event that doesn't represent successful completion.
- When converting a **Guide to a Task**, ensure that the start and end action really reflect start and end of the Task.
- If there's a big drop between the first and second step, the **start trigger may be too broad** (e.g., loading the homepage). Narrow it down to the first action that clearly indicates the user is beginning the task.

Good to know

- Tags remain available for tracking single elements, but they no longer influence Task Success Scores. They are shown under a dedicated section in the Task Success view.
- Data refreshes hourly, so your analytics stay up-to-date.
- Tasks vs Tags: Use Tasks to measure process completion. Use Tags to track specific feature interactions.
- If you remove an application URL, Tasks or Tags linked to it will stop being tracked but still appear in the

Task Success overview until you delete them.

Survey analytics

Last Modified on 24.09.2025

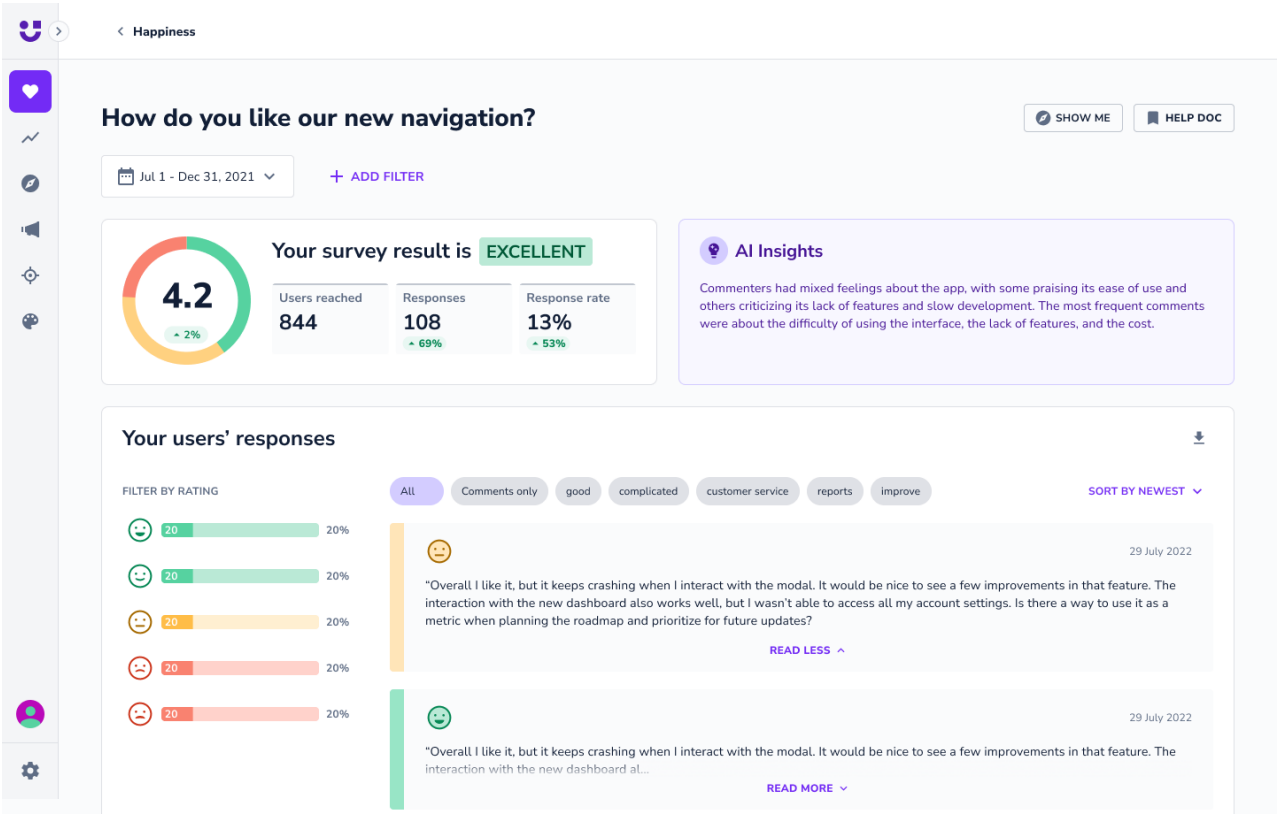
Why use it

Having the ability to ask any question regarding your application and its features provides you with the means to measure user satisfaction. Understanding user sentiment plays a key role in comprehending how your digital adoption is progressing. .

About Surveys

With the new emoji-based scale, survey participants can effortlessly provide feedback by selecting one of 5 emojis representing different sentiments. You can run multiple Surveys simultaneously across various pages and User Segments within your application.

Each Survey has its own analytics page, allowing you to monitor its responses and view the comments users have left. Use the date and segment filters to view results for a specific time frame or user group.



How is it calculated?

Survey score	AVG of all Survey scores

NPS analytics

Last Modified on 12.12.2023

Why use it

Measuring the Net Promoter Score (NPS) is the key to understanding your users' opinion about your application. Sending the NPS survey via email requires a lot of manual setup and the response rate tends to be lower. It is time to move your NPS to where your users are - into your application.

About NPS

NPS is a recognized method to track your user's loyalty and opinion based on how likely they are to recommend your app.

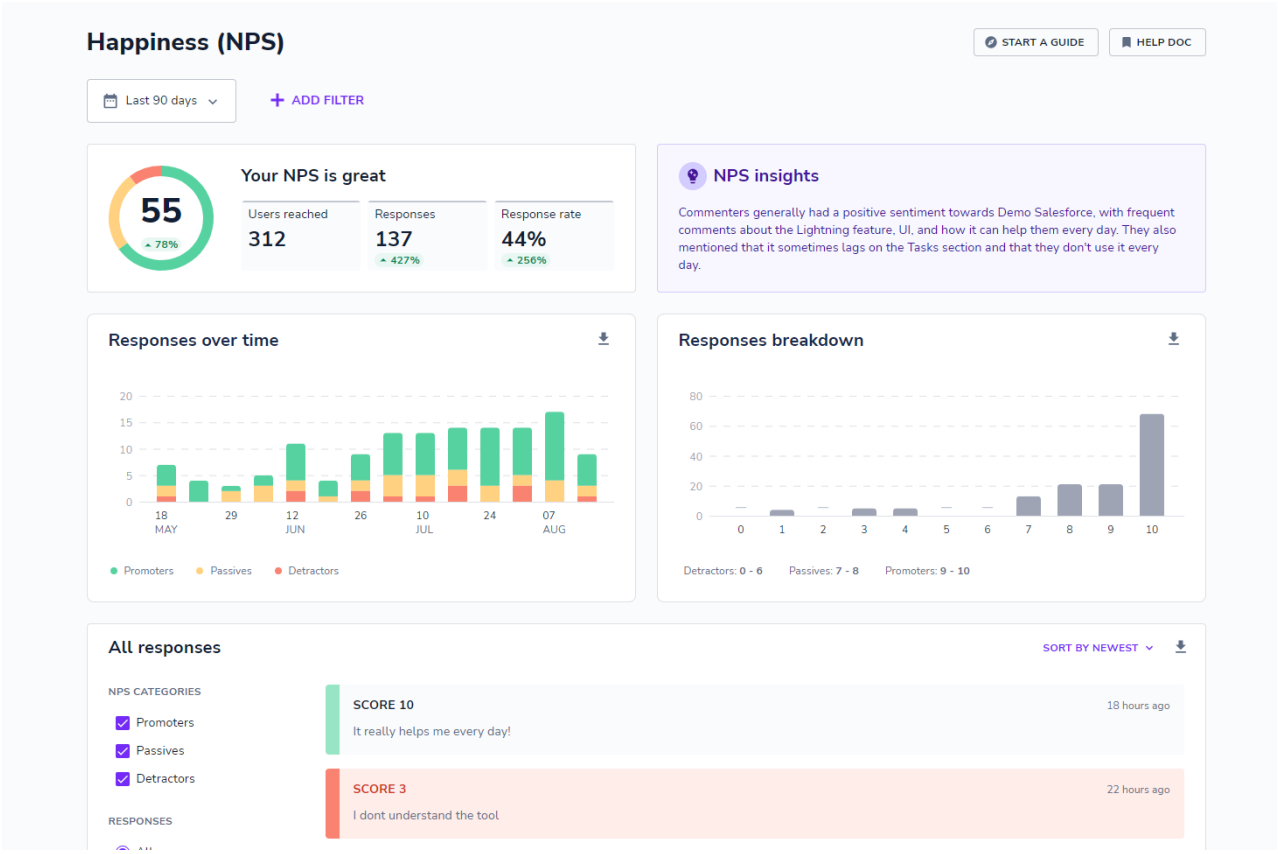
User responses range from 0-10 and they are divided in 3 groups:

- **Detractors**: responses of 0-6. These users are not satisfied and could potentially share their negative experiences with the others around them.
- **Passives**: responses of 7-8. These users have a neutral attitude towards your product. Passives are not unhappy, but also not likely to recommend your app.
- **Promoters**: responses of 9-10. These users enjoy using your app and are likely to recommend it to others. In the B2C case, these users are likely to purchase from you again.

ℹ NPS score is calculated by subtracting the percentage of your detractors from your promoters -> NPS = % of Promoters – % of Detractors.

NPS analytics

You will be able to see your NPS on your Analytics page. It also displays various trends, such as the score going up or down over time. You will also see comments that users left that can suggest improvements. For deeper analysis, you can apply existing user segments to all responses.



How is it calculated?

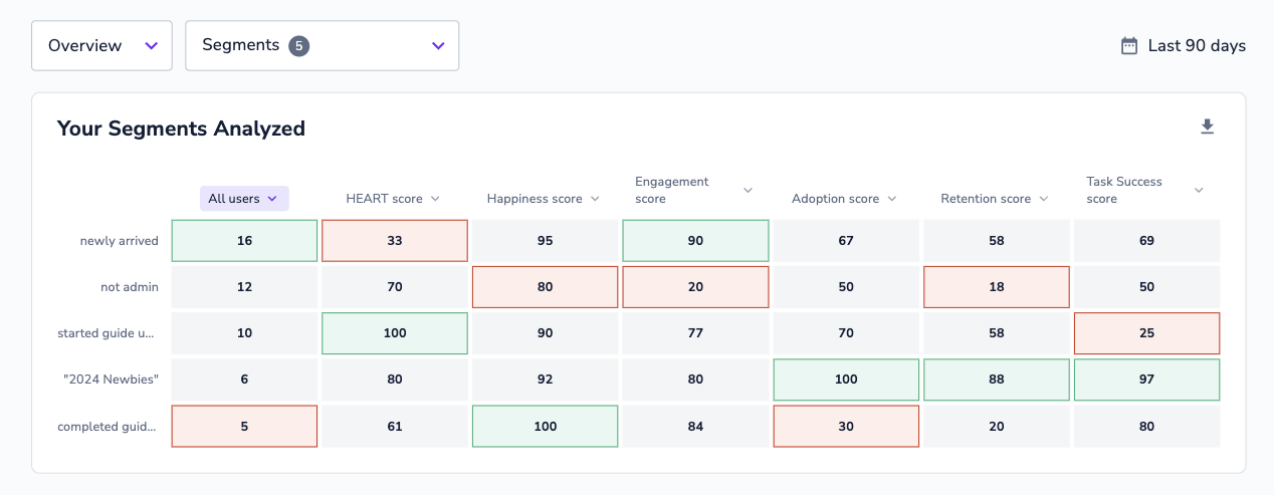
NPS score	(promoters - detractors) / all responses NPS score can be from -100 to 100.
Promoters	response scores 9 and 10
Passives	response scores 7 and 8
Detractors	response scores 6 or lower

Segment Analysis

Last Modified on 19.02.2025

About Segment Analysis

Segment Analysis gives you a clear snapshot of segment scores across your application in a single view. This makes it easy for you to compare scores, identify high performers, spot areas for improvement, and make data-driven decisions to maximize value and ROI.
You can find Segment Analysis on the HEART Overview page.



	All users	HEART score	Happiness score	Engagement score	Adoption score	Retention score	Task Success score
newly arrived	16	33	95	90	67	58	69
not admin	12	70	80	20	50	18	50
started guide u...	10	100	90	77	70	58	25
"2024 Newbies"	6	80	92	80	100	88	97
completed guid...	5	61	100	84	30	20	80

How to use it

- Green indicates the highest score within the column.
- Red indicates the lowest score within the column.
- Filter by HEART section:
  (Overview, Happiness, Engagement, Adoption, Retention, Task Success)
- Filter by Segment:
  The default view shows your top 5 segments by user count. Use the filter to adjust the number of segments displayed.

Good to know

- The data represents a rolling snapshot of the last 90 days and updates daily.
- Newly created segments will appear in the filter but won't show in the heatmap until tomorrow.
- User growth rate is not displayed in Segment Analysis.
- The user goal is configured on the application level. Therefore the user adoption rate will be the same for segments with the same number of users. User adoption rate = (actual users divided by user goal) multiplied by 100.

Why use it

- Segment Analysis gives you a single, at-a-glance view of all your segments, making it easy to compare scores and eliminating the need to navigate multiple pages.
- With Segment Analysis, you can quickly identify high and low performers, helping you focus on areas that need improvement.
- By identifying high-performing and underperforming segments, you can allocate resources more effectively, focusing on areas that drive the most value while minimizing unnecessary costs.
- This feature helps you make better, data-driven decisions by providing clear insights into how your segments are performing across your application.
- By reducing manual data gathering and minimizing errors, Segment Analysis streamlines workflows and improves efficiency, so you can focus on analysis rather than data collection.

How users move through a Task (Sankey diagram)

Last Modified on 07.04.2026

About the Sankey View

The Sankey diagram is a flow map that shows the paths users actually took through a Task, not just how often each action was performed.

Think of it like a river that splits into streams. The wider the stream, the more users flowed that way. Where streams narrow or stop, users dropped off or took a detour. This makes it easy to see at a glance which journey is most common, where users struggle, and where they give up without reading a single table or report.

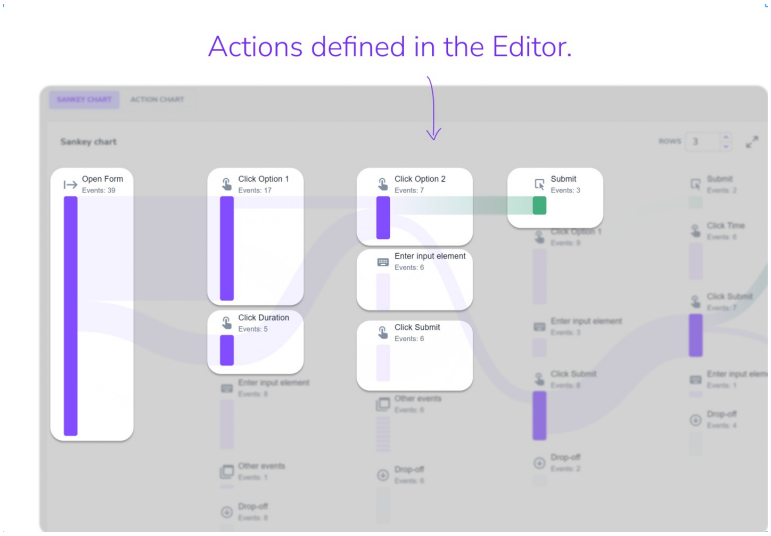
- Use the Action chart for action-level event counts (*"How many times 4th action was performed"*)
- Use the Sankey for flow, sequence, and drop-off analysis

How to Read the Sankey

- Flows (connecting lines): Flows show transitions between actions. The thicker the band, the more users took that path.

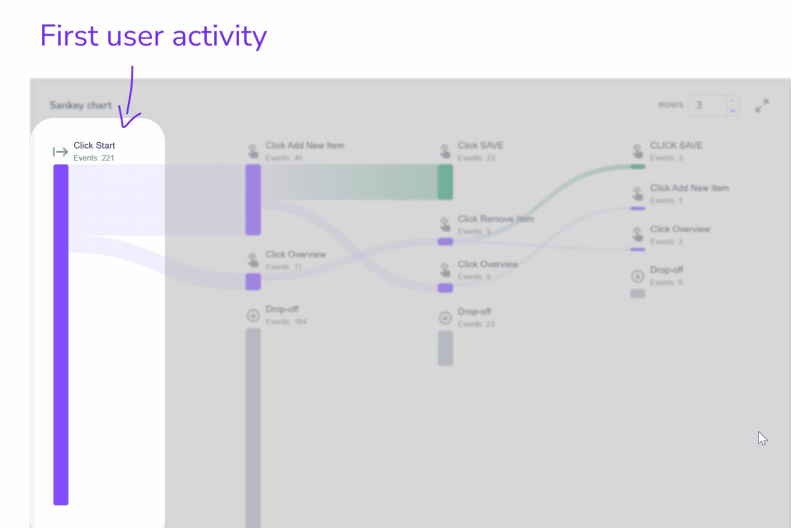


- Nodes (bars): Each node represents an action defined in your Task. The height of a node is proportional to the number of events recorded for that action. Event counts are shown on hover for each node and flow.



- Columns: Each column represents a step in the user journey, how many actions deep users were at that point.

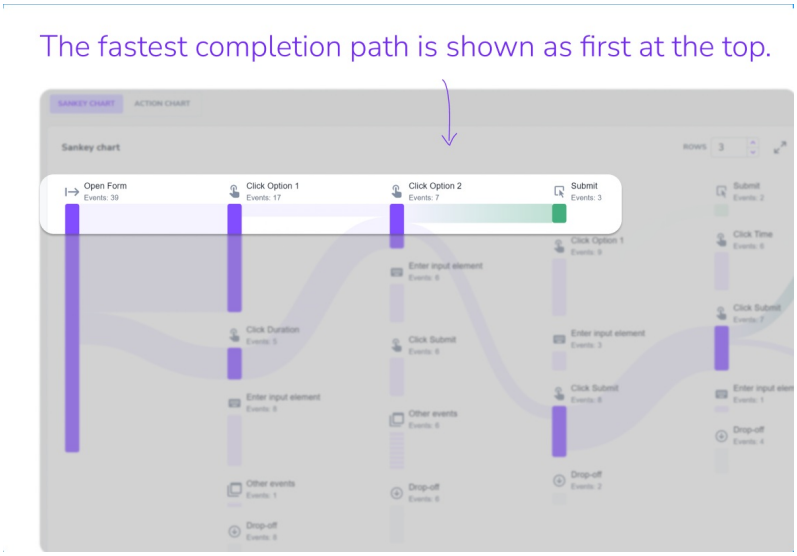
For example, *"Path X took users only 3 clicks to complete the task"*



- Rows: Represent actions took at that each step.

For example, *"Most common 3rd actions for users were X, Y and Z"*

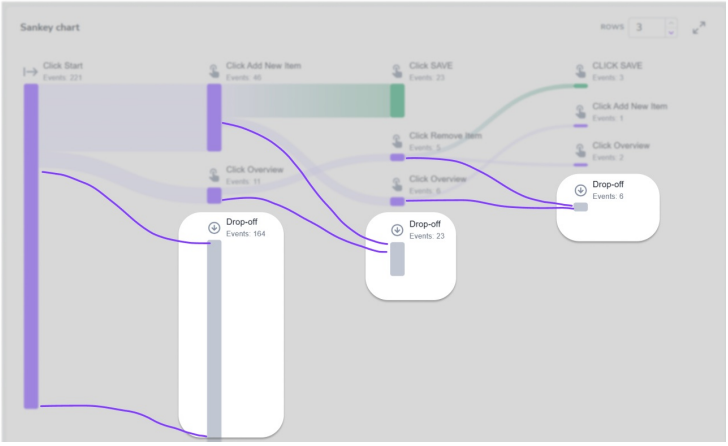
By default, the diagram shows the 3 most common paths. Less common paths are grouped under "Other events." Increase the number of rows to reveal more detail.



Drop-off nodes: Grey nodes indicate where users stopped and did not continue the Task.

For example, drop off in the 3rd column means that we stopped receiving Task events after second user action.

Drop-off



How to Use It

- Find the dominant path: Follow the thickest bands from left to right. This is the most common journey users take through your Task.

- Spot drop-offs: Look for large grey drop-off nodes. The column where they appear indicates how far into the Task users got before stopping.

- Identify friction by looking for:

- A flow splitting into many branches at one step (confusion or unclear UI)
- Users returning to the same action across multiple columns (rework or missing context)
- A large share of users reaching "Other events" (increase rows to investigate)

These patterns could indicate confusion, missing guidance, or unnecessary effort.

- Find automation potential by checking for:

- Thick, repeated paths - actions many users do manually, again and again
- Loops - the same steps repeating across columns
- Long paths for simple outcomes - too many steps to reach a goal

These patterns suggest steps that could be automated or skipped entirely.

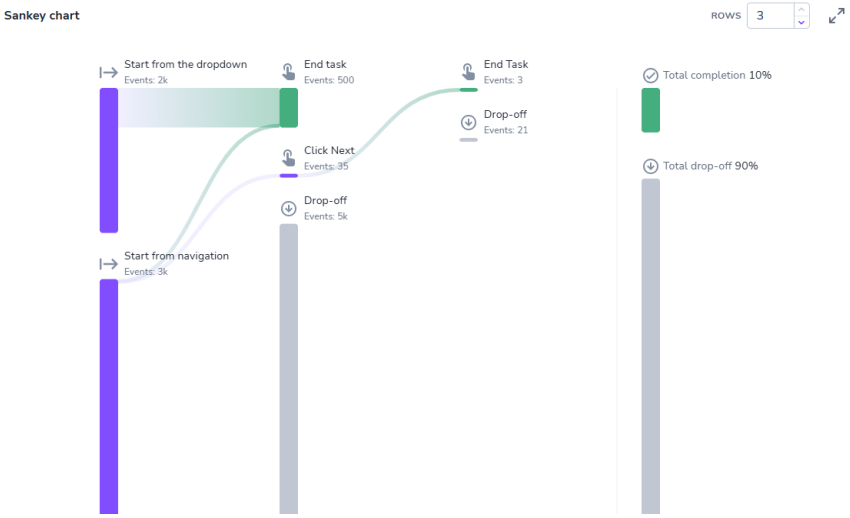
- Compare different paths: Compare paths by thickness (how many users follow them), length (how many steps they take), and drop-off rates along the way. This helps you answer: are users taking different routes to reach the same outcome, and which one is more efficient or less error-prone?

- Identify the best path: The best path is usually the top (fastest) path, the thickest path, and the one with the fewest steps and lowest drop-off. This is the journey to protect, promote, and optimize.

Multiple starts

Task can be defined with multiple starting points in the Editor. If your Task has multiple starting points, the

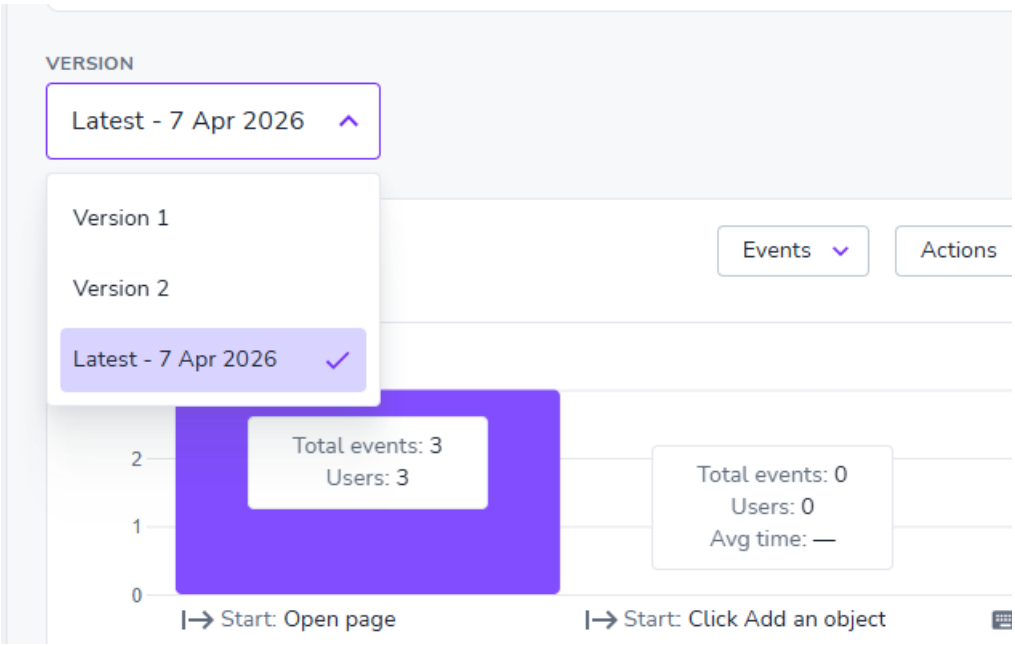
Sankey shows which one users triggered most often, helping you understand where users actually begin the workflow.



Different Task versions

If your Task has been edited structurally (actions added, removed, or reordered), you will see different versions of the Task in the analytics. We've added filtering by Task version to avoid mixing data from different versions of the same Task.

By default you will see the latest version. Keep in mind that the data from when it this latest Task definition was active (*for example, 7th of April you've introduced a new action to the Task)*



Good to Know

- Data refreshes hourly.
- The Sankey reflects behavioral data, not your Task definition. Users may take actions in a different order than you defined them.
- Numbers in the Sankey may not exactly match the Action chart. This is expected. The Sankey applies readability filters: consecutive repeated actions are collapsed, actions can repeat in a loop, and very

unusually long sessions (top longest 10%) are excluded from the visualisation. Therefore, use the Action chart for precise event totals (e.g., "*total amount of clicks and users on 6th action in the selected period*").

Userlane Content Analytics

Last Modified on 12.09.2025

Content Analytics

Evaluate how different users interact with your Userlane content and get live engagement insights on your Guides, Announcements, and Tooltips.

Why use it

Use the analytics to

- measure your content performance
- find content that needs optimization
- analyze Guides, Announcements, and Tooltips in-depth

The table below provides you with a high-level overview of Userlane Content Analytics with links to dive deeper as needed:

	Goal	Metrics	
Userlane Content Overall	Understand overall engagement with in-app content	Views Interactions Content Types	
Guides	Ensure users complete key processes successfully	Starts, Completions, Drop-off Rate, Error Log	Read more
Announcements	Confirm reach and impact of critical communications	Views, Interactions	Read more
Surveys	Capture user sentiment and satisfaction directly in workflows	Response Rate, Completion Rate, Sentiment Score	Read more
Tooltips	Support users with contextual knowledge at the point of need	Views, Interaction Rate	Read more
Validators	Measures how often users trigger, correct, or fail input validators	Success Rate, Views, Average Attempts to Correct	Read more

Guide analytics

Last Modified on 12.01.2024

Why use it

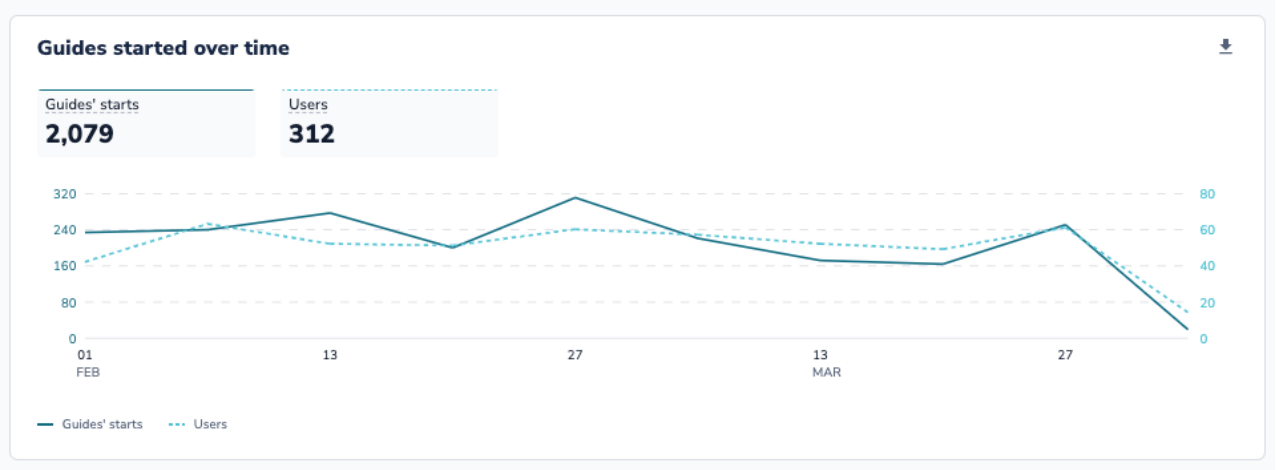
Use Guide Analytics to monitor how well each of your Guides is driving software adoption, based on how far users have progressed through it.

It helps you to:

- evaluate the performance of each individual step
- identify crucial drop-off points
- make continuous improvements.

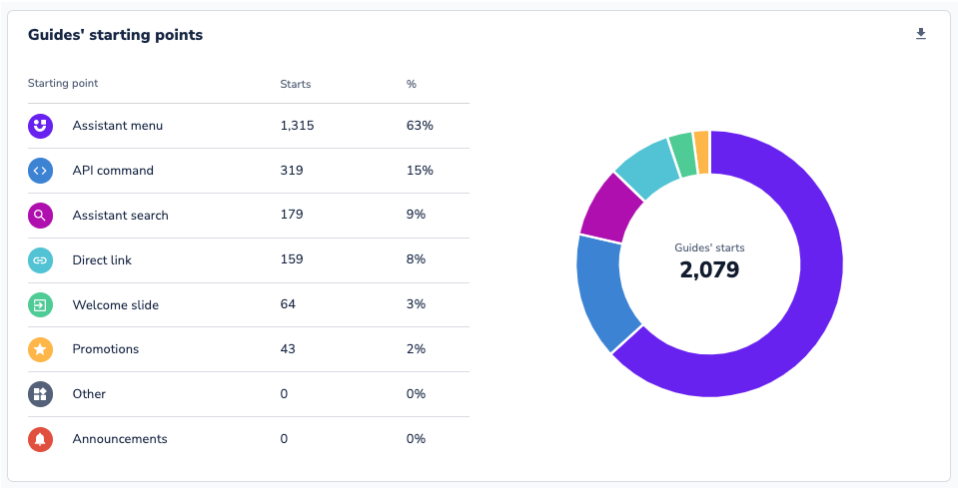
Metrics

Guides started over time



Guides' Starting Points

Where the user found and started the Guide.

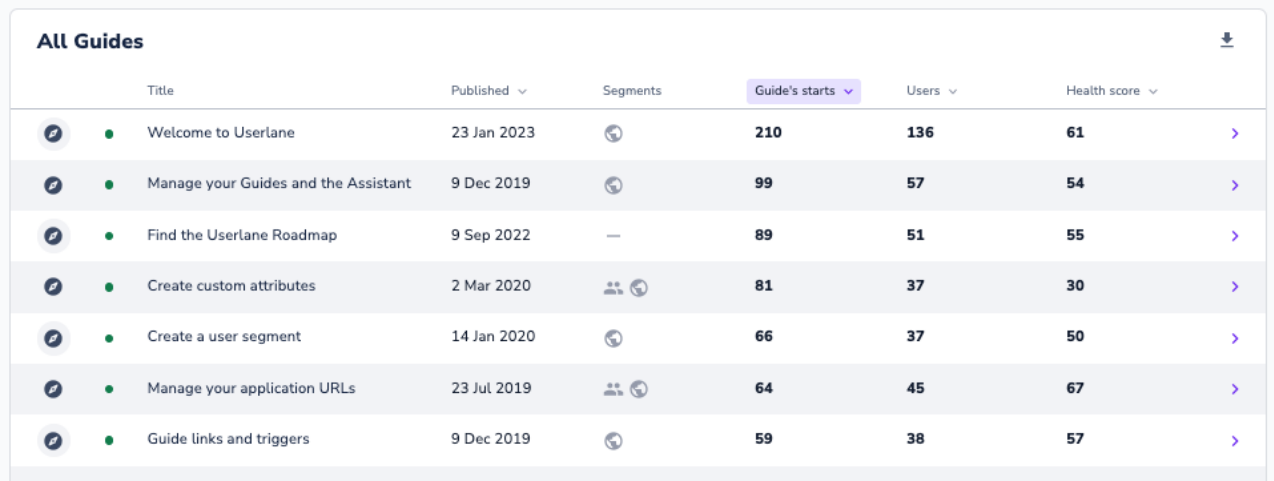


Total: The number of times a Guide was started from each source.

%: The percentage of times a Guide was started from each source out of the total Guide starts.

Individual Performance

Here, you will be able to find performance metrics for each individual Guide that you have published.



Next to each of your Guides, you will see the Guides' current status:

- green dot: Guide is currently live
- grey dot: Guide was live but is now unpublished

Step Details

You can click on any individual Guide to analyze its performance further and understand exit points and errors.

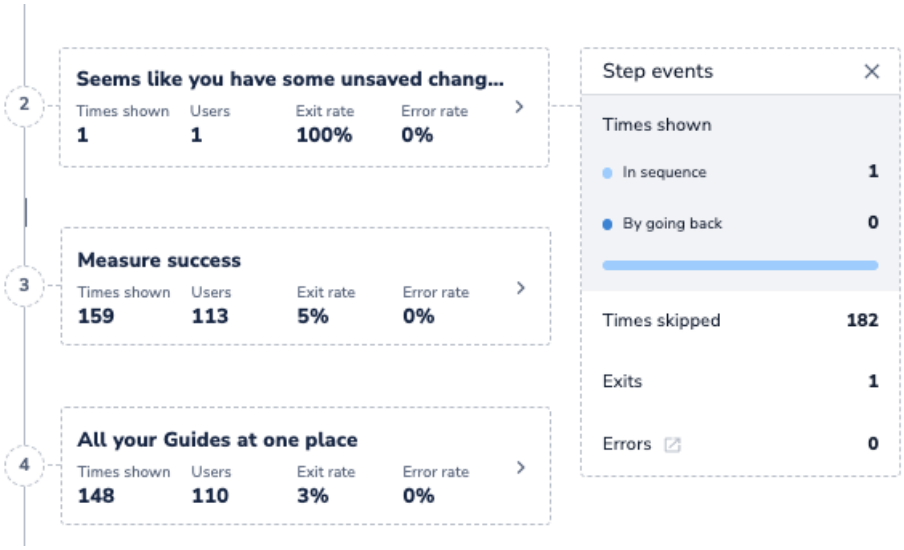
Step Type



- **First/Last Slide:** appear as squares in the step list.
- **Mandatory Step:** appear as a solid circle in the step list. These steps require user interaction before they can proceed to the next step.
- **Optional Step:** appear as a dotted circle in the step list. These steps either don't require user interaction before users can proceed (e.g. explanation step) or they might have some skip logic linked.
- **Step Alert:** appear as a red circle in the step list. Users have experienced errors in these steps. Review these errors by opening the error log contained within the step details.

Step Events

For every step you can review the events to better understand whether errors occurred.



For more information around errors, review the following article: Alert notifications

Best Practices

Utilize the Health Score

Each Guide has a calculated Health Score. The Health Score indicates how far your users progressed through a Guide.

 Health Score = [Number of times a Guide was completed / (Number of times a Guide was started - Number of times a Guide was exited on the first step)]

The score ranges from 0 to 100 where a 100 means all users are completing the Guide.

Understand the reason for the low Health Score

- Error Alert was triggered: Users have challenges completing this Guide.
  - **Action:** Take a look at this article on resolving alerts.
- No Error Alert but low Health Score compared to others: Users have challenges completing this Guide. If the Guide is not breaking, then the users are exiting intentionally.
  - **Action:** Review the Guide to consider why a user might exit.
  - *Example: If you included a link within one of the steps in the Guide, it is possible that the users are clicking on the link but then never returning to complete the Guide. Consider only including links in steps that are towards the end of the Guide so that users are not being encouraged to leave the Guide before completing important steps.*
- Leaving Guide earlier than expected: Users may find the answer to a question they had before reaching the end of the Guide and will exit early.
  - **Action**: Review whether links are embedded in the beginning of the Guide or process can be finished without completing the Guide. Consider adjusting the Guide or segment.

Guide step details

Last Modified on 12.01.2024

Why use it

Step details provide insights into each of your Guide steps to help you understand exit points and errors. First, select the time range that you want to analyze and apply any filters to narrow down the user group you are interested in.

All Guides

At a glance you can see all your Guides and see

- **Current status:** Check here to see if your Guide is currently Public, meaning available to your users, or Private, meaning it is hidden from your users.
- **First time published:** The date you first made your Guide available to your users.
- **Page Segment:** If applicable, this will show the page segment you have applied to this Guide.
- **User Segment:** If applicable, this will show the user segment you have applied to this Guide.

By clicking on a Guide you will be redirected to Details about the Guide

Guide Details

How did your Guide perform?

- **Health score:** The Health Score indicates how far your users progressed through the Guide.
- **Failure rate:** It's the percentage of users that left a Guide due to an error, in ratio to all users that started the Guide.

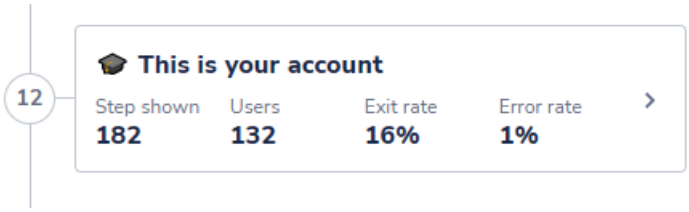
> ℹ Health Score = [Number of times the Guide was completed / (Number of times the Guide was started - Number of times the Guide was exited on the first step)]

The score ranges from 0 to 100 where a 100 means all users are completing the Guide. It is important to note that users can still be receiving value from Guides even if they are not completing them. See this article for scenarios where this may be the case.

- **Guide started:** The number of times this Guide was started. It could include the same user multiple times if they started the guide more than once.
- **Unique Guide started:** The number of users who started this Guide. Each user will only be counted once towards this number.

How did specific Guide steps perform?

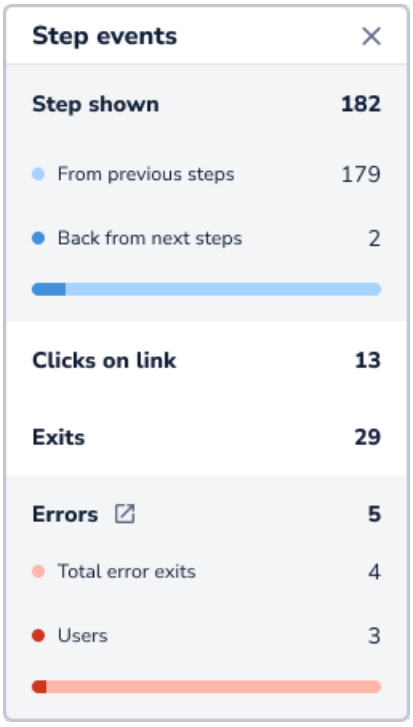
Evaluate the performance of each step within your Guide.



- **Step shown:** The number of times this step was shown to your users.
- **Users:** Number of users that saw this step.
- **Exit rate:** Intentional exits / Step shown
- **From previous/next steps:** Explains if the step was shown due to users coming from previous steps or if they went back to it from the following steps.
- **Skips:** Number of times the optional step was skipped.
- **Intentional exits:** Number of times the step was intentionally exited (close button or escape key).
- **Errors:** Number of times this step was not found and the error pop-up was shown.
- **(total) Error exits:** Number of times users exited the Guide from the error pop-up.
- **Error rate:** Errors / (Errors + Skips + Shown)

  If the error rate is low, there is likely no cause for concern as it is entirely possible the user simply had technical difficulties on their end, such as a lost internet connection. Otherwise, it could be that Userlane was unable to find the element on the page for this step.

  To find out more information about which users experienced the error, click the symbol within the error window in order to open the Error Log.



  For more information around errors, review the following article:

Step Key



- **First/Last Slide:** appear as squares in the step list.
- **Mandatory Step:** appear as a solid circle in the step list. These steps require user interaction before they can proceed to the next step.
- **Optional Step:** appear as a dotted circle in the step list. These steps either don't require user interaction before users can proceed (e.g. explanation step) or they might have some skip logic linked.
- **Step Alert:** appear as a red circle in the step list. Users have experienced errors in these steps. Review these errors by opening the error log contained within the step details.

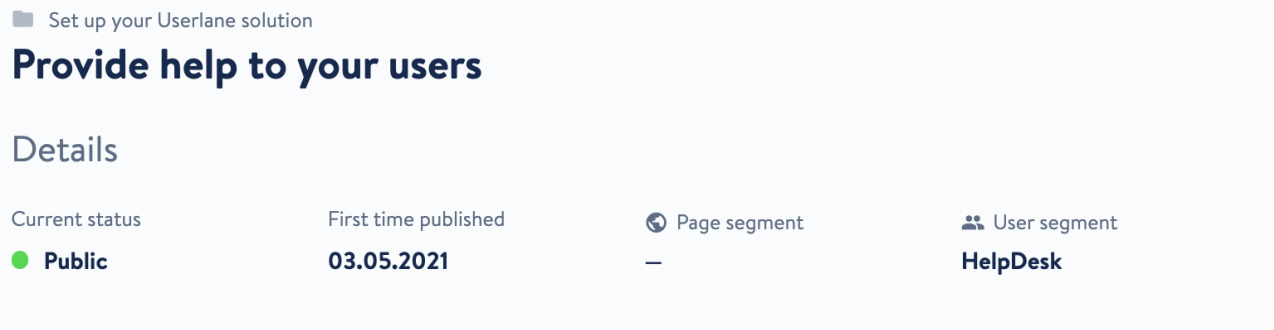
Analytics error log

Last Modified on 12.01.2024

Why use it

If you need to resolve an alert, the Error Log can provide more information to help you understand why the error occurred.

Guide details



Current status: Displays the status of this Guide. This is either Public or Private.

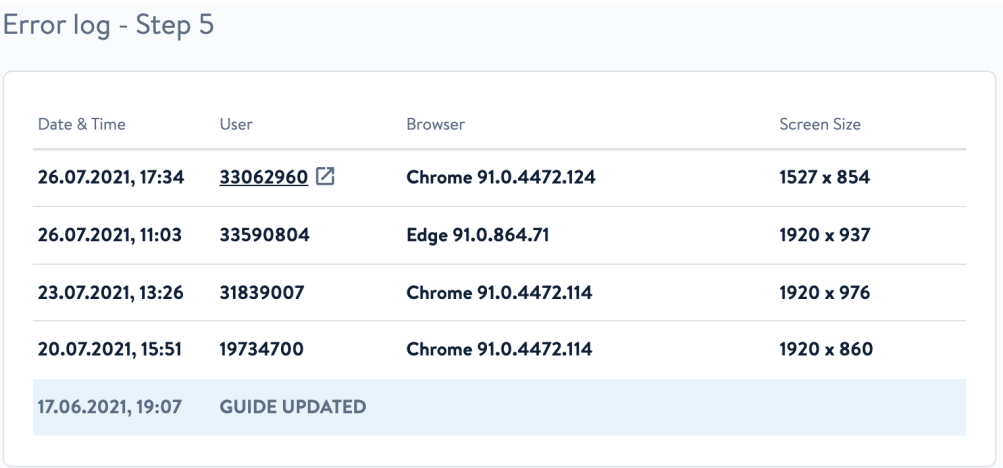
First time published: Displays the date that this Guide was first published.

Page segment: If applicable, displays the page segment applied to this Guide.

User segment: If applicable, displays the user segment applied to this Guide.

Error details

Errors recorded for a particular step display the following information: date and time that the error occurred, ID of the user who experienced the error, and which browser and screen resolution they were using at the time of the error.

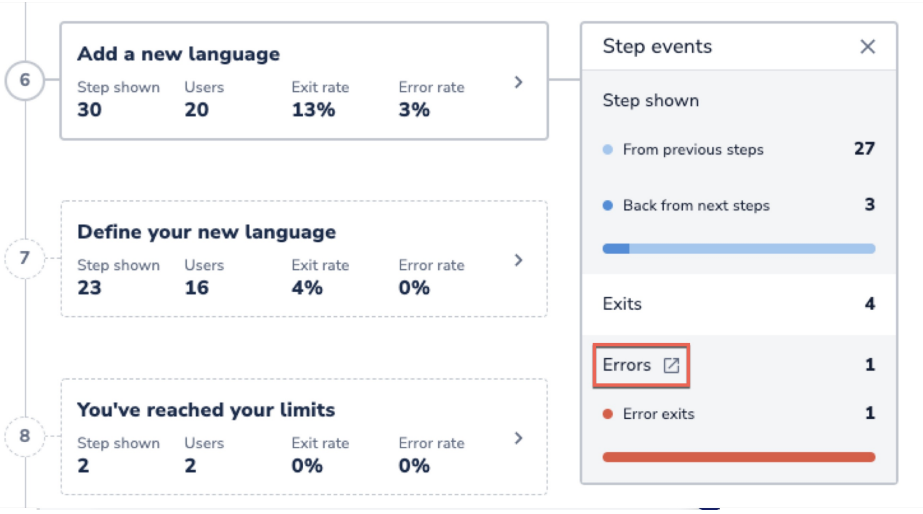


Click the user ID to find more information about that particular user, for example, their email address or other attributes.

The error list table above displays errors in date order. By default, only 30 errors are shown, but you can click "Load more" to load up to 90 errors on this page.

The blue highlighted "Guide Updated" row displays the date and time of the last update to the Guide. Any errors occurring after this time will be displayed in bold text.

For finding the Error log you need to go to the Analyze tab > Guides. Then you need to have a Guide with errors and go to the particular step and click the arrow next to it to open a tab like below. Then click on the Errors to open the Error log.



Best Practices

- Sometimes, the same user will trigger multiple errors. Review the user ID column and to see if any IDs repeat. If so, this could mean that the error is not a widespread issue, but limited to a particular user.
  Action: Find out more about that particular user by clicking their user ID.

- If all of the errors are occurring for the same browser, consider if most of your users use the same browser or if they use a variety of browsers.
  Action: If they use a variety, test this guide using the browser where your users seem to be experiencing errors to identify what the problem could be.

- If all of the errors are occurring in a smaller screen size, it is possible that some of the elements being highlighted in your guides are being hidden while a user is in smaller resolution.
  Action: Shrink your browser window and test this guide in the smaller resolution.

- If all of the errors occur before the Guide Updated date rather than after, it could be that you have already resolved the problem with your most recent change to the guide.
  Action: Check back in later or wait to see if another Alert email is triggered for this guide.

- After reviewing the timestamps of the errors, consider if the underlying application was down at any point when these errors occurred. If so, there is likely no problem with the guide.
  Action: None. In order to remove the red alert symbol, you can always make a small text change. Any edit to a guide will remove the alert.

User activities

Last Modified on 12.08.2025

About User Activities

Userlane can give you insights into the User data that is being passed to us depending on your individual configuration. This data can be accessed in the Userlane Portal.

Why use it

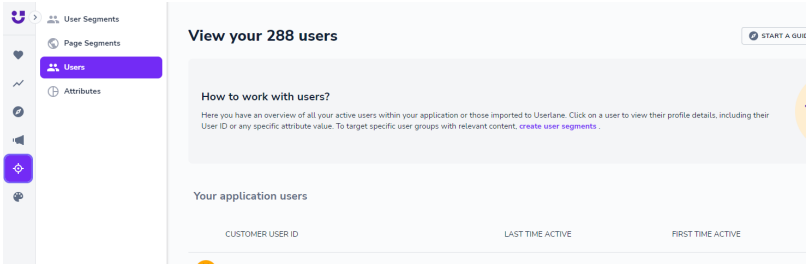
You can

- check if a specific User has completed the Guides.
- check if a user was “targeted” and, if needed, update the segment so this and other users are included in it.
- review user activities, e.g. completed Guides
- check User information e.g. if you want to validate/test that an attribute you are sending is associated with the user

How to access it

To access the User Details section of the Portal, follow these steps:

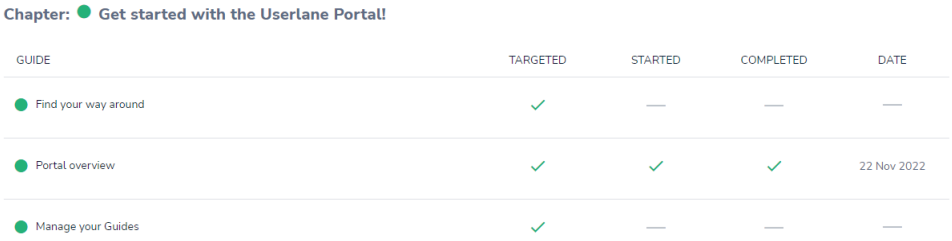
1. Go to the *Segments > Users section*.
2. You will see a list of Users.
3. Note that the list contains a limited number of users, and the total number is displayed above the list.
4. To view details of a specific User, click on their entry in the list.
5. The User section is divided into Details and Activities. The Details section provides general user data. The Activities section displays the User's interaction with the Guides.



Below, we will present both of the sections.

User Activities

The Activities section will show you the Guides the User has interacted with and the ones he is targeted with. The list is organized by Chapters.



The list will show you the interaction type of a given Guide:

- **Targeted:** means if the Guide is available to that user (User is included in the segment)
- **Started:** shows if the User has started the Guide (not necessarily completed)
- **Completed:** shows if the user has completed it
- **Date:** shows the completion date

The dots next to the Guide and Chapter titles indicate whether they are published (green) or private (gray).

Announcement analytics

Last Modified on 12.01.2024

Why use it

Use the Announcement Analytics to understand how your notifications are performing and how to optimize the experience.

Views and interactions

How many users saw your announcements?

Any of the following events would be considered an Announcement view:

- announcement was automatically opened via an announcement prompt or opened intentionally by the user
- announcement(s) were pushed to users and popped up automatically (one announcement push could include multiple announcements if you have more than one active at once)

 The number of Views could include the same user multiple times, while the Unique Views will only count a unique user once.

How many users interacted with your announcement?

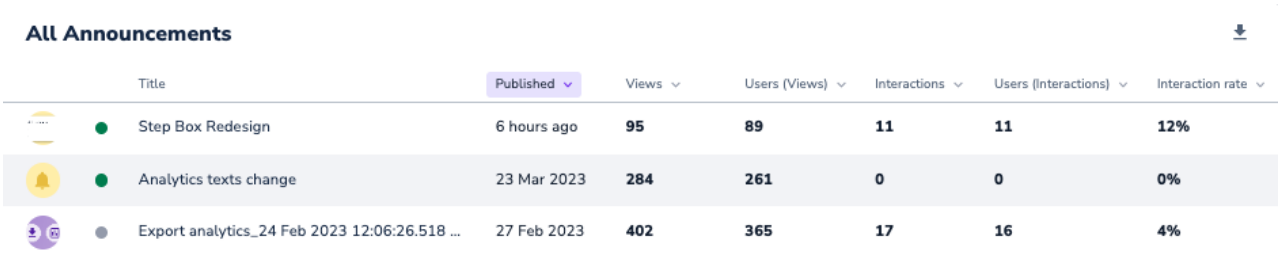
Any of the following events would be considered an Announcement interaction:

- Guides started: a Guide was started from an Announcement
- Links clicked: a link was clicked from an Announcement

 The number of Interactions could include the same user multiple times, while the Unique Interactions will only count a unique user once.

Performance

Here, you will be able to find performance metrics for each individual announcement that you have published.



Next to each of your announcements, you will see the image that was included with the announcement (if applicable), as well as the announcement's current status:

- green dot: announcement is currently live
- grey dot: announcement was used or is in draft mode

Interaction Rate

Each announcement has a calculated Interaction rate:

Interaction rate = (Unique Interactions / Unique Views) * 100

Best Practices

There are valid reasons for a low Interaction rate. Find here concrete tips what to consider then.

- The Announcement did not include a link or direct the user to begin a guide.
    - **Action**: Consider the purpose of your Announcement.

      If your goal was to simply relay information to your users, then the best metric for you to use is the number of views your Announcement has, rather than referencing its interaction rate. If your goal was to have the user start a Guide, try including the Guide in the Announcement.
- The announcement did direct the user to a guide, but not many users actually started the guide from the announcement. Note that the included guide will not appear to any users who are not included in the segmentation for that guide.
    - **Action**: Try checking the segmentation that has been applied to the guide and make sure that the users who are viewing the announcement are also users who you would like to begin the included guide.
- The announcement was pushed at the same time as other announcements. The users may not see or read through all of them.
    - **Action**: Try staggering your announcements apart so that the users do not become overwhelmed with them all at once. Don't forget to consider how frequently your users log into your application. They will not see the announcement until they log in, regardless of the announcement publish date.

- You have reused an old announcement (you published an announcement, set it to private, and later published it again). Since announcements will only be pushed to a Unique user once, repurposing old announcements will not trigger a pop up for any user who had already viewed the old announcement in the past.
    - **Action**: Instead of reusing old announcements, try duplicating the old one or creating a new one from scratch.

Tooltip Analytics

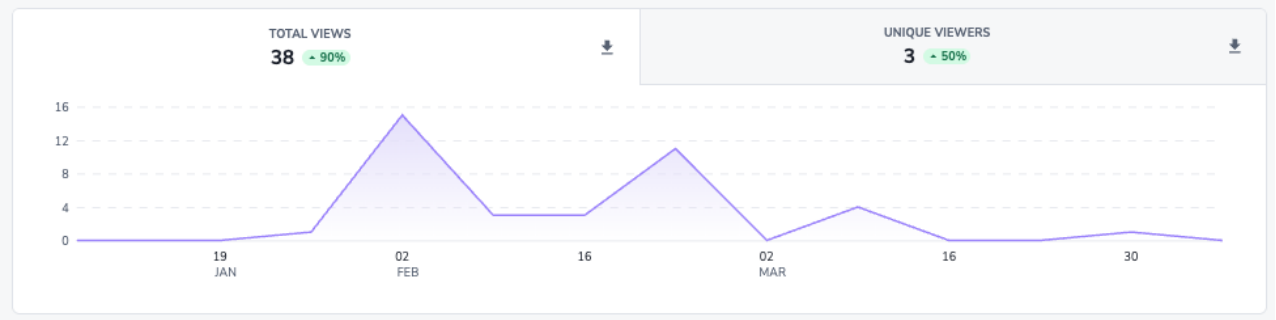
Last Modified on 07.04.2026

Why use it

Use Tooltip Analytics to monitor how well your Tooltips are driving software adoption and supporting your users where they need help. This page allows you to track the interactions with all Tooltips over time, as well as dive deeper to see more granular data for individual Tooltips.

Metrics

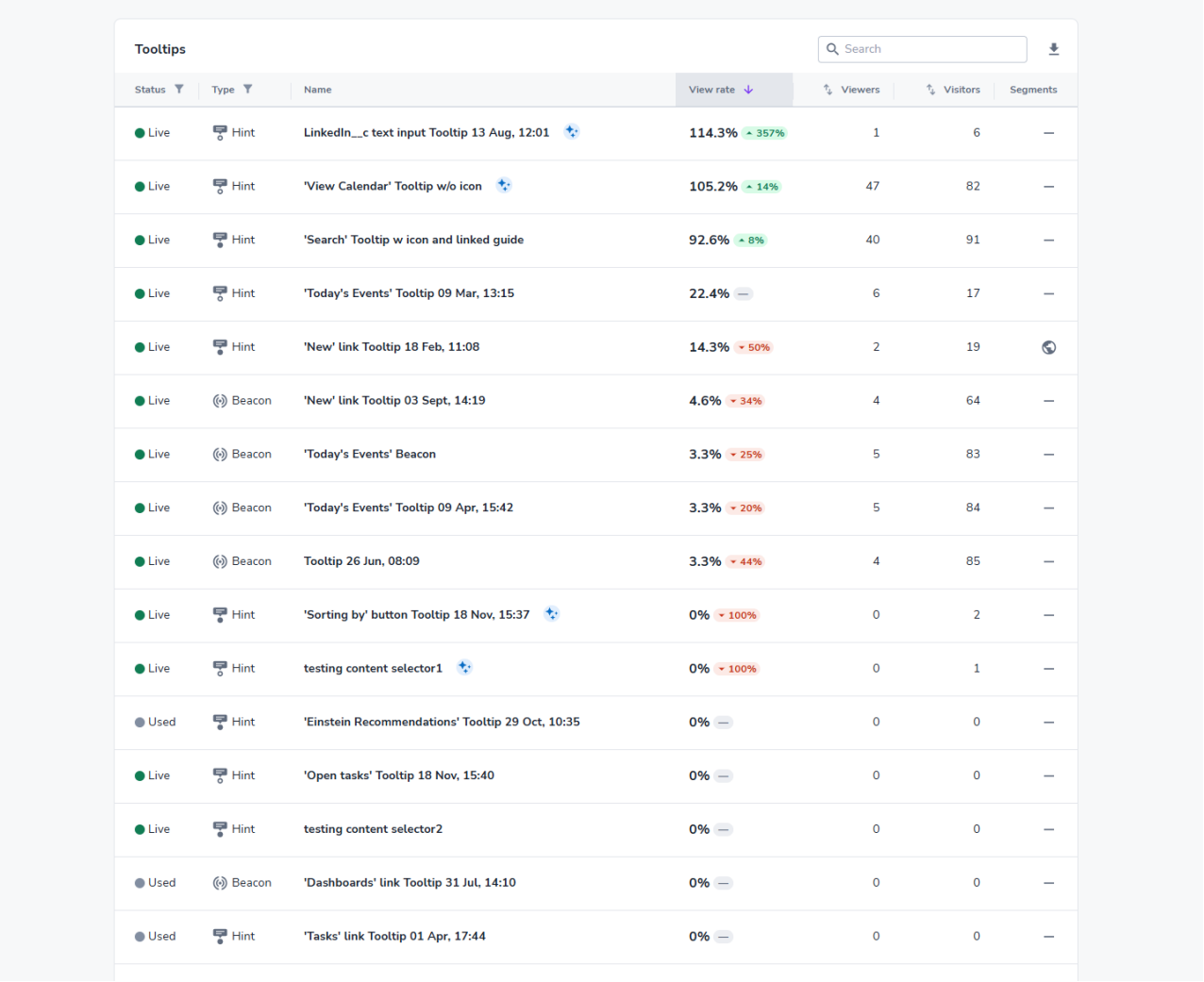
Views over time



In the chart above you can see the total views for all of your Tooltips as well as the number of unique viewers plotted over time.

Individual Performance

Below the Views over time chart, you will find a table with all Tooltips.



Each row corresponds to an individual Tooltip and offers you a helpful overview of that Tooltip's performance.

The horizontal bar chart in the middle of the table represents total values:

- **Visits**: a visit is counted when a user comes to a page and the Tooltip loads
- **Views**: a view is counted when a user has clicked on a Beacon or hovered over a Hint
- **Link clicks**: if a Guide has been linked to Tooltip, a link click is counted when a user clicks on the linked Guide.

The **View Rate** metric corresponds to the total visits and views shown in the bar chart and is calculated as **(Views / Visits) * 100**.

ℹ It's possible to have a View Rate greater than 100% for Hints. This is expected because we calculate the View Rate using **Total Views** and a user can view a Hint type Tooltip multiple times in a single visit.

The table also shows you **Unique Viewers** and **Unique Visitors**, which correspond to unique users who have respectively viewed the Tooltip and/or visited the page where the Tooltip is available.

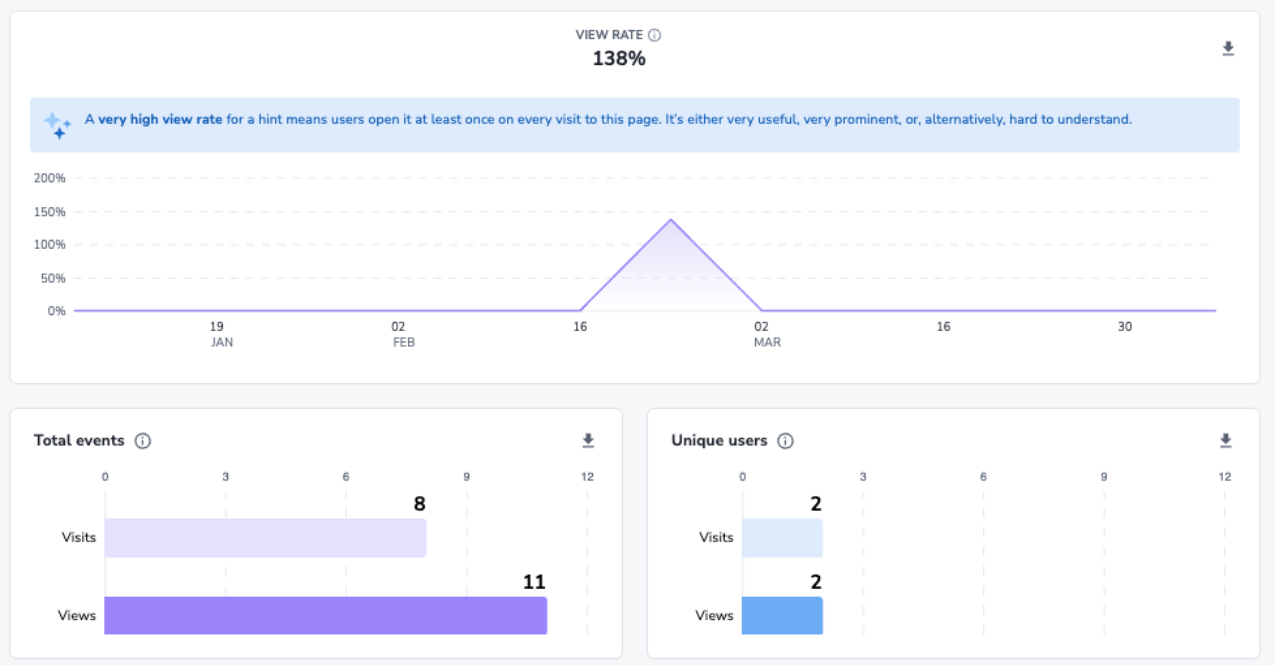
 You can filter the table using the metrics described above. For example, filter by **Most Unique Viewers** to

see which Tooltips are reaching the most individual users.

Tooltip Details

You can click on any individual Tooltip to see how it has performed over time. In this case, you will see a representation of **View Rate** and **Click Rate**, with Click Rate being calculated as **(Total Clicks / Total Views) * 100**.

Below you will find a graphical representation of Total Events and Unique Users, similar to the All Tooltips table on the overview page.



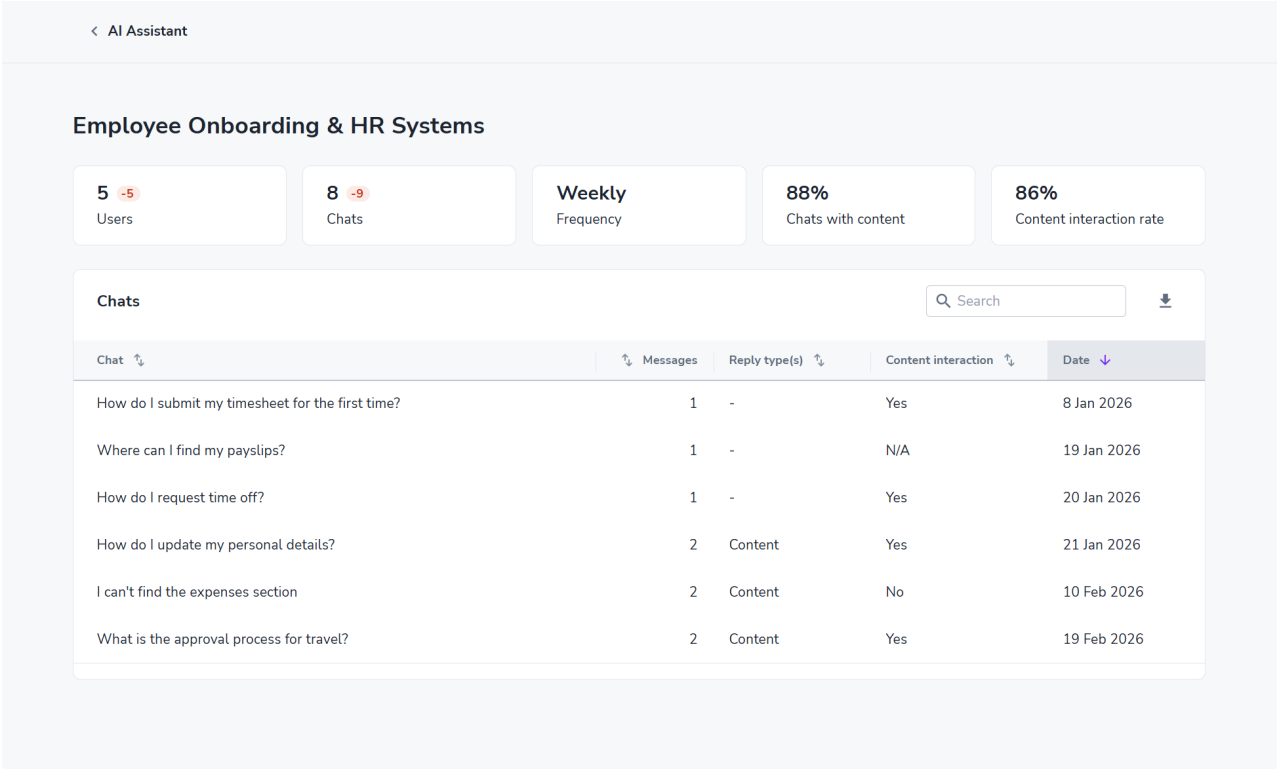
Ai Assistant analytics

Last Modified on 25.03.2026

Overview

AI Assistant Analytics gives you visibility into how users are interacting with the Userlane AI Assistant. It helps you understand what topics users are asking about, whether the assistant is responding with relevant content, and where content gaps exist in your guidance.

Use this section of the portal to ensure users are getting the help they need.



Where to find it

AI Assistant Analytics is accessible from the Userlane Portal under the **Content analytics > AI Assistant** section. You must have an active AI Assistant enabled for your account to see analytics data.

Key features

Topic clustering

Chats are automatically grouped into topics so you can quickly identify what themes users are asking about most. A single chat can belong to multiple topics.

- Topics improve over time as more data is collected
- Emerging topics are labeled "new"
- Click into a topic to browse all related conversations

Chat browsing

Browse and read individual user conversations directly within the analytics view. Click on any chat to open it in a side panel for full context.

- Conversations are listed with message count, reply type, and content interaction status

Content coverage

See at a glance whether the AI Assistant responded to user questions with or without relevant content. This metric helps you:

- Identify gaps in your guidance content
- Prioritize which areas to expand or improve
- Measure the impact of content updates over time

Privacy

User IDs are not displayed within chat analytics. This ensures individual conversations remain private while still providing actionable aggregate insights.

Metrics reference

Users	Number of unique users who started a chat in the selected period
Chats	Total number of chat sessions
Frequency	How often users are engaging with the AI Assistant (e.g., monthly)
Chats with content	Percentage of chats where the assistant replied using your content
Reply type	Indicates how the assistant generated its response (e.g., knowledge base)
Content interaction	Whether the user interacted with content surfaces shown in the response (Yes/No)

Tips for getting the most out of analytics

- Check content coverage regularly to find unanswered questions and create targeted guides or messages.
- Topic clustering improves as your dataset grows, give it time before drawing strong conclusions from new topics.
- Click on the chat and use the side panel to read full conversations

App Discovery

Last Modified on 09.04.2024

About App Discovery

Userlane App Discovery helps you assess your organization's SaaS landscape by revealing the applications your employees actually use. It leverages the power of our browser extension to give you a clear overview of the most frequently used apps from a wide range of popular SaaS tools.

Why should you use it?

The bigger a company gets, the more money and time it spends on various software applications. A lack of visibility into the actual app and license usage across the entire business is not only hard to manage, but can quickly lead to an exhausted or exceeded IT budget and a higher compliance risk.

App Discovery can easily find, rank, and filter active user applications by software type and country, providing you with a clear overview of your company's SaaS portfolio.

You're spending a lot on licenses for certain apps, but aren't sure if and to what extent employees actually use them? Let's find out and reduce unnecessary costs!

You rolled out a new application, and want to know if your employees are actively using it?We can show you the level of adoption and where to focus your training efforts.

Different teams in your company use redundant applications for a similar or the same purpose?Consolidate apps and reduce your software spend by phasing out the ones with a lower HEART score.

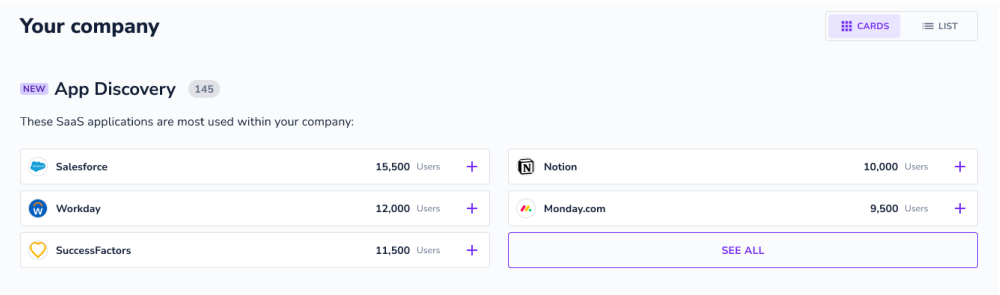
You're in the final stages of migrating from one application to another, and you're not sure how many users are still active in the old one? We can get the exact number for you.

There are SaaS apps your employees aren't allowed to use?Use App Discovery to make sure they really don't.

How do you enable it?

App Discovery is enabled for all customers by default, but it requires the Userlane browser extension to be implemented in order to start discovering apps.

Once implemented, the browser extension will monitor the usage numbers for the most popular SaaS applications. If it observes traffic on one of those apps (by at least one user), the results will be shown on your dashboard.



ℹ The Userlane browser extension does not track every page the user visits. It only registers visits to the predefined list of top SaaS applications (e.g. Salesforce, Jira, Trello, SuccessFactors).

ℹ App Discovery will not work when you have Userlane implemented with a Snippet as then only information about the page where the Snippet is implemented can be passed on.

If you need to disable App Discovery, you can always do so on the Analytics settings page in your Userlane Portal.

How do you get the most out of your discovered apps?

App Discovery will give you an overview of the revealed applications your employees actually used. For each app, you will see how many users have been detected. To get an ever deeper understanding of the usage of these applications, you can:

- **Turn on HEART Analytics for more granular insights**

To get more detailed analytics for a specific application, simply click the 'plus' icon to add the application to Userlane. We will then start tracking the HEART metrics to measure its user engagement, adoption and retention in more detail, which allows you to identify specific points of action.

- **Improve your application's adoption with our in-app engagement suite**

Based on the app's HEART analysis, you can improve individual metrics by providing targeted in-app help and guidance to your employees.

No applications were discovered for my company

If App discovery fails to identify any apps for your company, here are some steps to consider:

1. **Browser extension not rolled out:** Ensure that the browser extension has been correctly deployed within your company. If you've only used Userlane snippet until now, this might be the case. App discovery requires a browser extension to function properly. Additionally, confirm whether the extension is installed by most of your users.

2. **Browser extension not updated:** Check if the Userlane browser extension has been updated for your users to the latest version.

3. **Company users:** Confirm that your users are registered as Company users within your organization.

4. **Application list:** Verify if you are using apps from our tracked app list. If you're not finding the apps you need, please reach out to us so that we can enhance our app tracking list.

5. **Custom domains:** Contact us to determine if your company utilizes custom domains for specific apps that should have been discovered by App discovery.

Top SaaS apps included in the App discovery

Last Modified on 24.04.2026

In order for App discovery feature to discover the applications used in your company, the Userlane browser extension observes the usage of leading SaaS application. However, it will only track visits to a predefined list of top SaaS applications.

The tracking operates by identifying the app's domain, so when the domain includes the specified pattern, it is presumed that the user is on that page. For instance, if "workday" is detected in the domain.

This list may expand in the future to include more SaaS applications, but it will specifically include only work-related tools and not websites that your employees might visit during their leisure time.

We will maintain transparency and regularly update this list for you to check.

List of applications included in the App discovery

15five

24SevenOffice

360Learning

99designs

Abacus.AI

Abnormal Security Corporation

Absorb

Accolade by Sopheon

Accrux Switch

ActiveCampaign

Acumatica Cloud ERP

Adaptive Shield | Crowdstrike

Adminsoft Accounts

Adobe

AgentGPT

Aha!

ahrefs

Aikido Security

Airtable

- AiseraGPT
- Aiven
- Akamai Technologies, Inc.
- Aleph Alpha Luminous
- Algolia
- Alkira
- Alpha Data
- Alpha Data LLC
- Amazon AWS
- Amazon Bedrock
- AME Accounting
- Amperity
- Amplitude
- Animoto
- Aplos Software
- Appcues
- ApplicantStack
- Applied Information Sciences
- Aprimo
- Apty
- Aqua Security
- Archway
- Asana
- Asthma/COPD
- Astra Security
- Astronomer
- Atlassian
- Augury Inc.
- Authomize
- Autodesk
- AvePoint
- Aviatrix
- Awario
- Backbase
- Balsamiq
- BambooHR
- Barracuda Networks
- Basecamp
- Basecamp Personal
- Baseline
- Beautiful.ai
- BigHand
- BigID
- BigPanda
- Bill.com
- BillingPlatform

- BIM360
- BIMcollab
- BioCatch
- Birthrate Plus
- bit.ai
- Blt.ly
- Bitbucket
- Blackboard
- Blackboard - Anthology
- Blue Yonder
- BNF/C
- Board International SA
- Bold Sign
- Boost.ai
- Botpress
- Box
- Brain.fm
- BreezyHR
- BrowserAI
- Bubble
- C3 AI
- Caktus AI
- Calendly
- Callminer
- Canva
- Capdesk
- Capterra
- CARA
- Carahsoft Technology Corporation.
- Caret Legal
- CaseFleet
- Casetext
- Ceipal
- Celonis
- Centraleyes
- Certify
- Certinia (Financial Force)
- Character.AI
- CharlieHR
- ChartMogul
- Chaser
- ChatGPT
- Chatsonic (Writesonic)
- Check Point Software Technologies
- CIS
- Citrix Systems
- Clara
- Claude
- ClearCompany
- cleverbridge

- ClickMeeting
- ClickUp
- Clio
- Clockify
- Cloudera, Inc.
- CloudHealth (VMware)
- CMSViewer
- Cockroach Labs
- CODA
- Code Academy
- Codepen
- Cognigy.AI
- Cognite AS
- Cognition AI
- Cohere for Business
- Cohesity
- CohesityDev
- Collibra
- Commvault Systems
- Concentric
- Confluence (Atlassian)
- Confluent
- Consensus AI
- ConstantContract
- Contentsquare SAS
- Context Labs B.V.
- Continu
- ContractSafe
- ControlUp
- Cookiebot
- Cornerstone
- CountAbout
- Coupa
- Coursera
- Crazy Egg
- Crisp
- CrossComply
- Crunch (UK)
- CrunchBase
- Cvent
- CyberArk
- D.Vinci
- d3js.org
- Darktrace
- Dassault Systèmes - 3DExperience
- Databricks
- DataCamp
- Datadog
- DataGuard
- Dataiku

- DeepL
- Deepset Cloud
- Delinea
- Demio
- Devpost
- Docebo
- DoControl
- DocSend
- DocuSign
- Dovetail
- Drata
- DreamHost
- Drift
- Dripify
- Dropbox
- Dropbox Sign
- DRUID AI
- Duck Creek Technologies
- Dynatrace LLC
- ED Mededitate
- Egnyte
- Elastic
- Elicit
- Enterprisedb Corporation
- Entrust
- Eolasmedical
- ePortfolio
- eShare
- Esri
- Everlaw
- Excalidraw
- Expensify
- F5 Networks
- FastSpring
- Feedly AI
- Figma
- Finway
- Fireflies
- Fiverr
- Fivetran, Inc.
- Flashgrid
- Flex
- Flickr
- FloQast
- Flow
- Forefront AI
- FormAssemby
- Fortinet
- Frase
- FreeAgent

- Freshbooks
- Freshdesk
- Freshworks
- Front
- Frontegg
- Funnel
- Fyle
- G2
- Gamma
- Gartner
- Gem Accounts
- GEP
- Ghost
- Gimp Online
- Github
- Gitlab
- glueckkanja-gab AG
- Google Ads
- Google Analytics
- Google Calendar
- Google Console
- Google Docs, Sheets, Slides & Forms
- Google Drive
- Google Gemini
- Google Jamboard
- Google Mail
- Google Meet
- Google Sites
- Google Trends
- Gorgias
- Gotransverse
- GPT4All Web UI
- Grafana
- Grafana Labs
- Greenhouse
- Grip Security
- GrooveHQ
- Grow
- HappyFox
- Haptik
- HashiCorp
- HCL Technologies
- Health Roster
- Health Roster Perform
- Health Roster Staff Bank
- Health Toolbox
- Heap
- Help Scout
- HelpCrunch
- HiBob

- HID Global
- Hireology
- Holded
- Holobuilder
- hootsuite
- Hotjar
- HROne
- Hubspot
- HuggingChat
- Hunter.io
- IBM Watsonx
- Icertis
- Ideagen Quality Management (IQM)
- iGrafX
- Illumio
- inDinero
- Infiot
- Infisign
- Infobip
- Infoblox
- Infogram
- Informatica
- Intapp
- Interakt
- Intercom
- International Development Company
- Intruder
- Intuit
- Invoicera
- Ironclad
- Island Enterprise Browser
- isolved
- Ivanti
- Jasper
- Jasper Chat
- JazzHR
- JFrog Ltd
- Jira On-Prem
- Jotform
- JumpCloud
- Juniper Group
- Juro
- Kahoot!
- Kanbo
- Kantata (Mavenlink + Kimble)
- KashFlow
- Kashoo
- Kayako
- Keyfactor
- Kinaxis

- Kira
- Klaus
- Klaviyo
- Klipfolio
- KnowBe4
- Kore.ai XO Platform
- Krisp
- KX
- Kyndryl
- Lacework
- Lamini
- LangChain Hub
- Laserfiche
- Lattice
- LayerX Security
- Leadpages
- LeanIX GmbH
- Leapsome
- Learnerbly
- Ledgy
- Legalinc
- LegalShifter
- LegalZoom
- Leicester Sexual Health
- Lever
- Lexis Nexis
- Linear
- LiveAgent
- LogicGate
- LogRocket
- Looker
- Loom
- Loop | Employee Online
- Lovable
- LucidChart
- Lunary
- M-Files
- Magical
- Mailchimp
- Mailgun
- Mailtrap
- Make
- ManageEngine
- Marketo
- Master Control
- Matillion Limited
- Matomo
- Maze
- MDCalc
- Medallia

- MediLogik
- MedLine
- Medstrom i-Tracker
- Medusa - The Injectable Medicines Guide
- Meetup
- MeisterTask
- Metabase
- MetaCalc
- MetricStream
- Micadpro
- Microsoft Copilot
- Microsoft SharePoint
- Microsoft Whiteboard
- MicroStrategy
- Mint
- Mint Management Technologies
- Miro
- Miscrosoft Copilot Studio
- Mistral Le Chat
- Mixpanel
- Mode Analytics
- Monday
- Monetizr (Anatomy)
- Moneydance
- MongoDB
- Mouseflow
- Moveworks Inc.
- MRI Planet
- MS Dynamics 365
- MS PowerApps Portal
- Mycase
- MyPreOp | Ultramed
- Nasuni Corporation
- Navenio
- Nerdio
- NetApp
- Netskope Security Cloud
- Netsparker | Invicti
- Netsuite
- New Relic
- Nextiva
- NextRoll
- NHS Clinical Evidence | NICE
- NHS.Net Webmail
- NIPE - NHS Baby
- Notion
- nTask
- Nuance Communications
- Nutanix, Inc.
- o9 Solutions

- Officevibe
- Okta
- Olark
- One Trust
- OneLogin
- OneReach.ai
- OneStream Software LLC
- Online Conversion
- Ontraport
- OpenCollective
- Optimizely
- Ora.sh
- Oracle Cloud
- Orca Security
- Outlook Email (Microsoft)
- Outreach
- OwnCompany
- OwnCompany Inc.
- Paddle
- PagerDuty
- Pain Scale
- Palo Alto Networks Inc.
- Palo Alto Prisma SaaS
- PandaDoc
- PaperForm
- Patient Transport Online (Clerical)
- Paylocity
- Paymo
- Pendo
- Perception Point Web Security | Fortinet
- Perplexity AI
- Personio
- Pexip AS
- Phind
- Phrase
- Pi (Inflection AI)
- PicMonkey
- Picovoice picoLLM
- Ping Identity | PingOne
- Pipedrive
- Pipefy
- Pixlr
- Planisware
- PocketGuard
- Podio (Citrix)
- Poe by Quora
- Poe.com
- PortalGuard
- Postgraduate Doctors Exception Reporting
- PowerBI

- PPM Express
- Prerender.io
- Prezi
- ProductBoard
- ProductHunt
- Profisee Group, Inc.
- ProfitWell (Paddle)
- ProofHub
- Prophix
- PROS
- PTC
- Puzzle.io
- Qlik
- QlikTech
- Qualaroo
- Qualtrics
- Qualys
- Quest Software
- QuickBooks Online
- Quip (Salesforce)
- Qumulo
- Quora
- Rasa Enterprise
- Recorded Future
- Recruitee
- Recruiter
- Recurly
- Redis
- ReferAPatient
- RelateIT A/S
- RELATIONALAI
- Relativity
- Reltio
- Remitly
- Replika
- Rescale
- Restream
- Resuscitation Council (UK)
- Retrium
- Rifumo Empowerment Holdings
- Rippling
- Roster Perform - Management Reports
- Rubrik
- Safecarelive
- Sage Accounting (Cloud)
- Sage Intacct
- SailPoint
- Salesforce
- SalesHandy
- Samepage

- SAP Ariba
- SAP BTP
- SAS Institute
- Saviynt
- Schlumberger Limited
- Scoro
- Scribd
- SearchStax Inc
- SeedProd
- Seeq
- Segment
- Seismic
- Semperis
- SEMRush
- SendGrid
- Sentry
- ServiceNow
- Shipa
- Shopify
- Shopware
- Sight Machine, Inc.
- Silverfort
- Similarweb
- SimpleLegal
- Simplybill
- Sisense
- Sitecore
- Sketch
- SkillShare
- Skyhigh Security (formerly McAfee Cloud)
- SlashNext
- SmartDraw
- Smartlook
- SmartRecruiters
- Smartsheet
- SnapLogic
- Snowflake Inc
- Sonarcloud
- Spendesk
- Sprinto
- Sprout Social
- Squarespace
- StackOverflow
- Stibo A/S
- Storyblok
- Strike Graph
- Stripe
- SuccessFactors
- Supermetrics
- Supernova

- Surveillance - Infoflex
- SurveyMonkey
- SurveySparrow
- Survicate
- SYNERISE S A
- Synthflow AI
- Tactivos dba MURAL
- TalentLyft
- Tanium Inc
- Tanso
- Tavily AI
- TeamTailor
- TeamViewer Web Client
- Teamwork
- Teladoc Health
- Templafy ApS
- Tenable
- Teradata Operations Inc.
- Tidio
- Tidio Pro
- Timely
- Tipalti
- Torii
- Toxbase
- Transmit Security
- Travelperk
- Trello
- Trevor AI
- Truelayer
- TrustArc
- Twilio
- Typeform
- Udemy
- UHL Libraries
- UIPath New York
- UKG
- Unbounce
- UnderDefense
- UsabilityHub
- UserGuiding
- Userpilot
- UserTesting
- Vanta
- Varonis
- Vectra AI, Inc
- Veeam Software
- Veeva
- Vellum
- Veracode
- VeriPark

- Vidyard
- Vimeo
- VisiLean
- VUMACAM
- VUMACAM (PTY) LTD
- Vymo
- W3School
- WalkMe
- Wave Accounting
- Wave Financial
- Webflow
- WebLLM
- Webmail
- Weekdone
- Wellfound
- WeTransfer
- Whereby
- Whimsical
- Wing Security
- Wirke
- Wise
- Wistia
- Wix
- Wiz, Inc.
- Wondercraft
- WordPress
- Workable
- Workday
- Workday Adaptive Planning
- Workfront
- Workiva
- Workzone
- Wrike
- Xero
- Yellow.ai
- YNAB (You Need a Budget)
- You.com
- Zafin
- Zapier
- Zendesk
- ZenHub
- ZEP
- ZipBooks
- Zluri
- Zoho
- Zoho Books
- Zoho CRM
- Zscaler

Portfolio overview

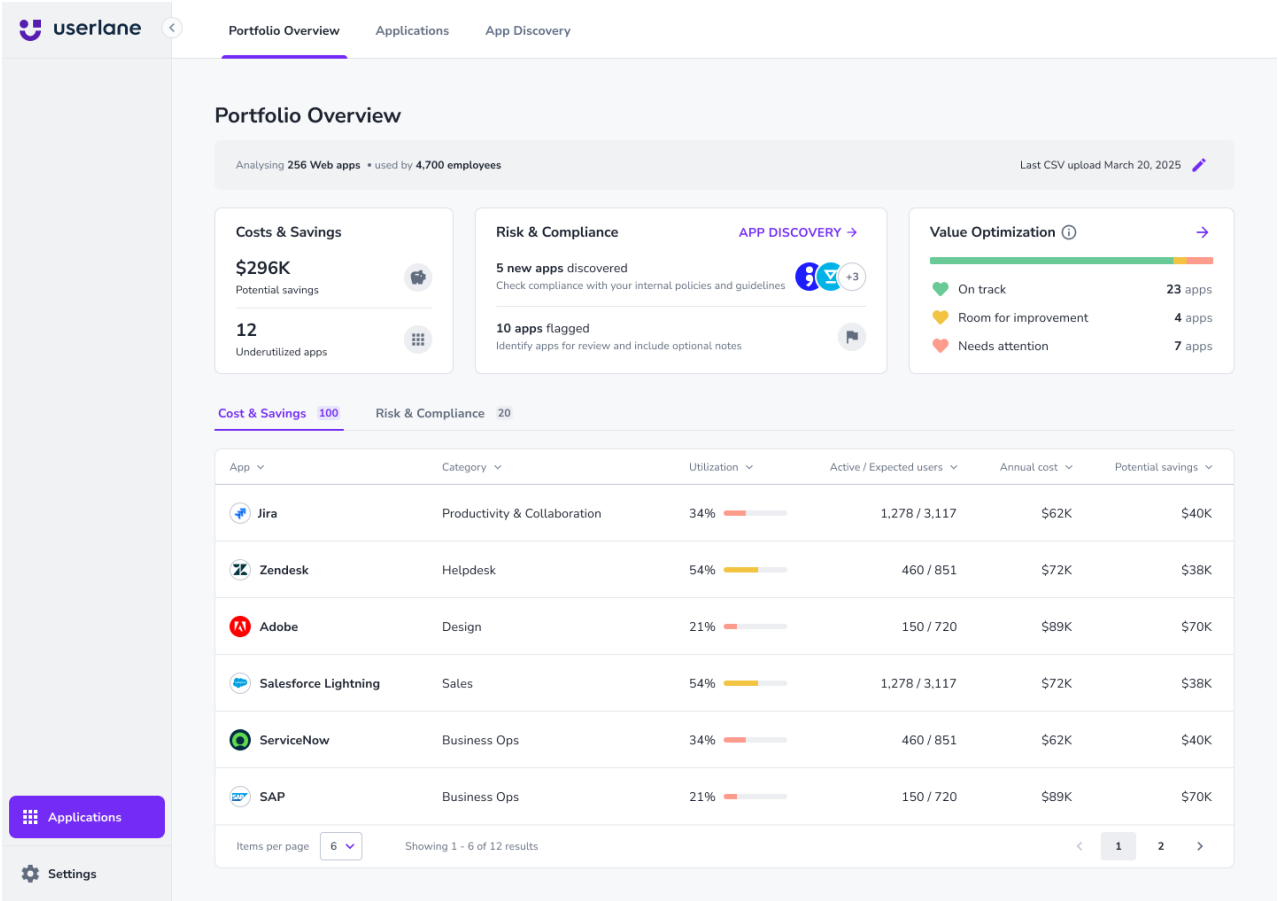
Last Modified on 22.05.2025

What is Portfolio Overview?

Portfolio overview provides strategic perspective of your SaaS landscape. It helps you identify cost optimization opportunities and mitigate security risks associated with unauthorised application usage. By integrating your discovered applications with financial, user, and contextual data, you understand if your SaaS investments deliver optimal value.

It helps you:

- Identify cost-saving opportunities
- Mitigate security and compliance risks from unauthorized app usage
- Understand the true value of your SaaS investments by combining discovered apps with financial, user, and contextual data



The data is organised into three core metrics groups:

1. **Cost & Savings -** Your potential savings at a glance, based on estimated unused licenses.
2. **Risk & Compliance -** Newly discovered apps can pose security and compliance risks. We highlight how many new or flagged apps exist. You can also add notes, e.g., “Check this app—may be risky.”
3. **Value Optimization -** Quick overview on how well your apps perform using HEART scores.

How to Activate It

1. Open the Portfolio Overview: Click the **logo** in the Userlane Portal to access the Portfolio Overview. This is your central hub for tracking and evaluating your applications.

2. Initial state before CSV upload: Before uploading any data via CSV, the Portfolio Overview will display a snapshot:

- **Cost & Savings tab** will display all your HEART-tracked applications, but no discovered apps will appear here until you upload the CSV for the first time.
- **Risk & Compliance tab:** Displays newly discovered apps (first seen in the last 30 days).

3. Download the CSV: Click the **pen** icon to download a list of your applications in a CSV template contains:

- All your HEART apps
- All the apps that were discovered for your company.

Each application has an ID, and you can only update information for apps that already have one. It's not possible to add new applications via CSV. To add a new application to your list, go to the *App Discovery* section and click **"Add Application".**

4. Add Usage Info: The file includes columns you can edit. Fill in **expected users** and **annual costs** to your CSV. If you have already set user goals in HEART analytics, they will appear here.

5. Re-upload the CSV: Upload the updated file. Your Portfolio Overview will now reflect how well your apps are being used and calculate potential savings.

6. Flag Apps with Notes: Use the flag icon to mark any app and leave a note—for example, if it poses a risk and needs review. Your flagged apps will appear in the Risk & Compliance tab.

How it is calculated?

Potential savings	Potential savings refer to the cost associated with unused licenses. This is calculated by multiplying the number of inactive users by the cost of their respective licenses. Only applications with a utilization rate **below 75%** are included in this calculation.
Underutilized applications	Number of applications with fewer users than expected, where utilization is less than 75%.
New apps discovered	All applications that were discovered in the last 30 days.
Value optimisation	**'On Track'** signifies high-performing applications, '**Room for Improvement**' identifies areas for optimization, and '**Needs Attention**' flags applications requiring immediate intervention. It is calculated based on HEART scores of these apps.

Portfolio overview: Update application data via CSV upload

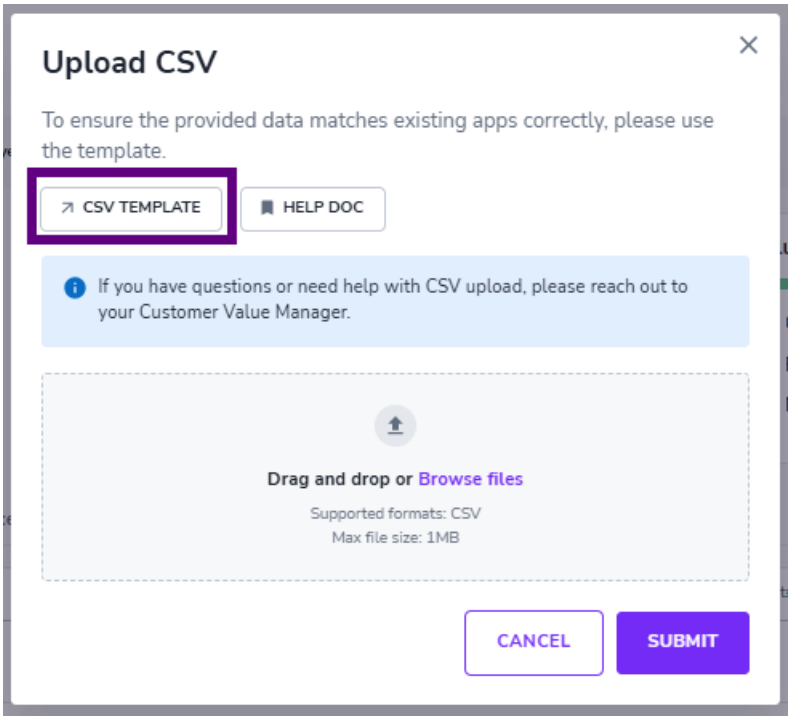
Last Modified on 21.05.2025

Keep your Portfolio Overview accurate and up to date by uploading a CSV file with key data for your discovered and tracked applications. This article walks you through each step, along with important tips to ensure successful upload and correct metric calculation.

How to update the application data?

1. Download the CSV Template

- Click the pen icon to download the CSV template.



- Use the downloaded template only. It contains:
  - All existing tracked applications
  - All discovered applications
- This ensures your file is correctly formatted and includes the App IDs required for updates. Please keep this ID in the file.

> Keep in mind that you cannot add new applications via CSV. To add new ones, go to App Discovery and click "Add Application".

2. Add Usage Data

Update the following fields to enable usage tracking and savings calculations:

- Expected Users
- Annual Cost
- Currency (any EEA currency is accepted).

	C	D	E	F	G
	applicationName	**category**	**estimatedUsers**	**yearlyCost**	**currency**
83971	Adobe Creative Cloud (Web)	PRODUCT_AND_DESIGN	11400	12310632	USD
ia9	SuccessFactors	HR	6200	2827200	USD
7044	ChatGPT	COLLABORATION_AND_PRODUCTIVITY	5800	5760000	USD
8bba	SAP BTP	IT_AND_TECH	5739	2880000	USD
c033	MS Dynamics 365	SALES_AND_CS	3665	1395840	USD
	Google	COLLABORATION_AND_PRODUCTIVITY	2500	360000	USD
19d	Databricks	ANALYTICS	1500	1500000	USD
!b83	SurveyMonkey	MARKETING	1500	950000	USD
:2bb6	Make	IT_AND_TECH	1100	8280	USD
34d6	W3School	EDUCATION_AND_TRAINING	922	70000	USD
c3f78	Perplexity	COLLABORATION_AND_PRODUCTIVITY	900	220800	USD
a7a0	Canva	PRODUCT_AND_DESIGN	730	141200	USD

CSV example

Please keep in mind:

- All three fields (Expected Users, Annual Cost, and Currency) must be filled to add expected users and calculate potential savings for desired application.
- Please **avoid using commas** in the values, as the format is comma-separated.
- While we accept all **EEA currencies**, the total potential savings across all applications will be displayed in USD.
- If you only want to update **expected users**, you can enter them directly on the **Adoption page**. The value will be pulled into your CSV and Portfolio Overview.

3. Re-upload the CSV

- After updating the file, upload it back via the interface.
- Your Portfolio overview will now show updated usage metrics and potential savings.

5. Flag Applications and Leave Notes

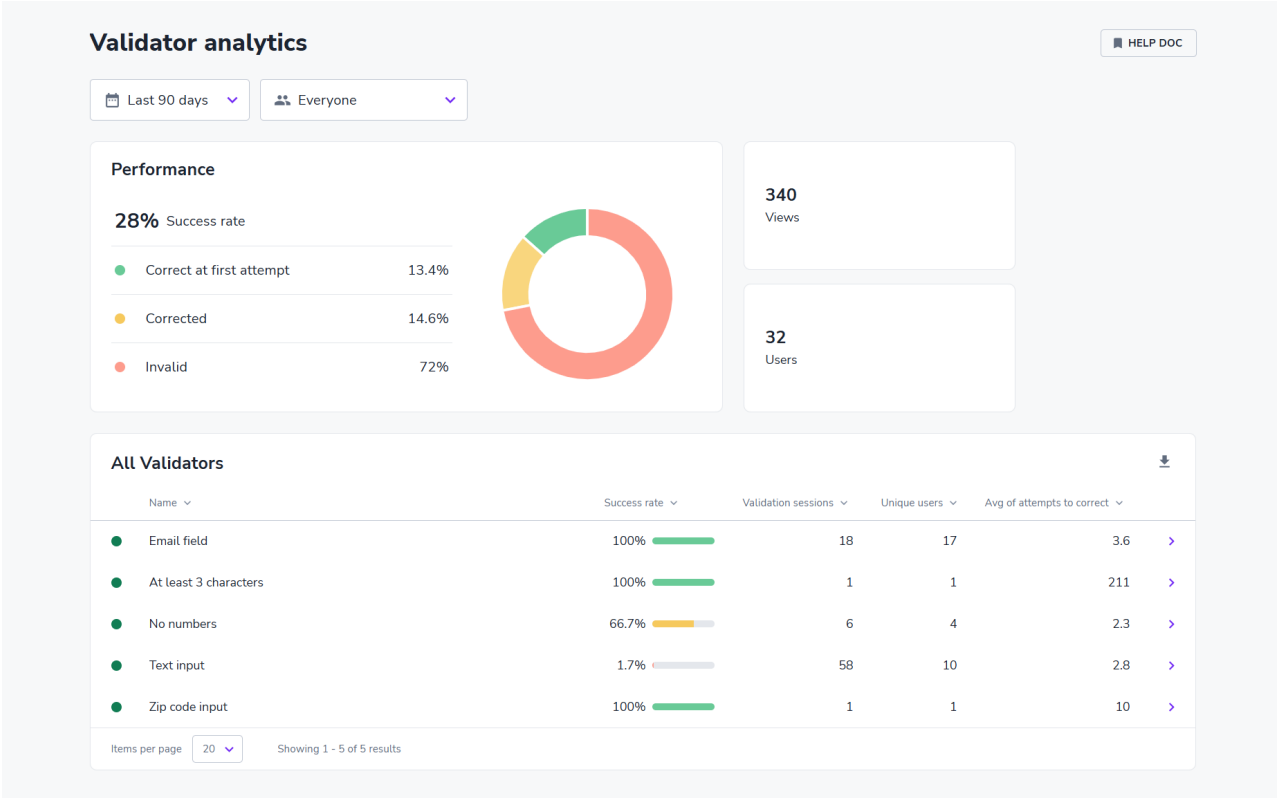
- Use the flag icon in the Portal to highlight any application that requires review.
- Add a note explaining the flag. For example: "Duplicate entry – needs cleanup" or "Risky app – pending IT review."

Validator Analytics

Last Modified on 29.07.2025

About Validator Analytics

The **Validator Analytics** page provides insights into the performance of *Validators.* These analytics help Validator creators monitor effectiveness, identify friction points, and optimize validation experiences across the platform.



To access it navigate to **Content Analytics** > **Validator Analytics.** You'll find a breakdown of overall performance as well as the ability to drill down into specific validator behavior.

Metrics

Success Rate	The percentage of sessions where a validation attempt ended in a valid input. Formula: *% (# of sessions with successful validation)/(# of sessions with validation) * 100*
Success rate breakdown	**Correct at First Attempt**: Inputs that passed validation on the first try. **Corrected**: Initially invalid inputs that were fixed and then accepted. **Invalid**: Inputs that remained invalid and were never corrected.
Views	How often the validator was triggered
Unique users	Number of distinct users who saw the validator
Avg Attempts to Correct	Average number of tries users needed before submitting a valid input.

Success rate over time	Line chart that success rate fluctuations over time, helping you identify trends, regressions, or improvements in validator performance.

Best Practices

- **Investigate Low Success Rates**: Validators with low success or high invalid rates may have unclear instructions, overly strict rules, or UI issues.
- **Monitor High Attempt Counts**: Validators with high “Avg of attempts to correct” suggest users struggle to get it right. Consider reviewing the pattern, tooltip, or input format hints.
- **Use Time Filters** to correlate validator performance with product changes, onboarding steps, or feature launches.

Goals

Last Modified on 16.06.2026

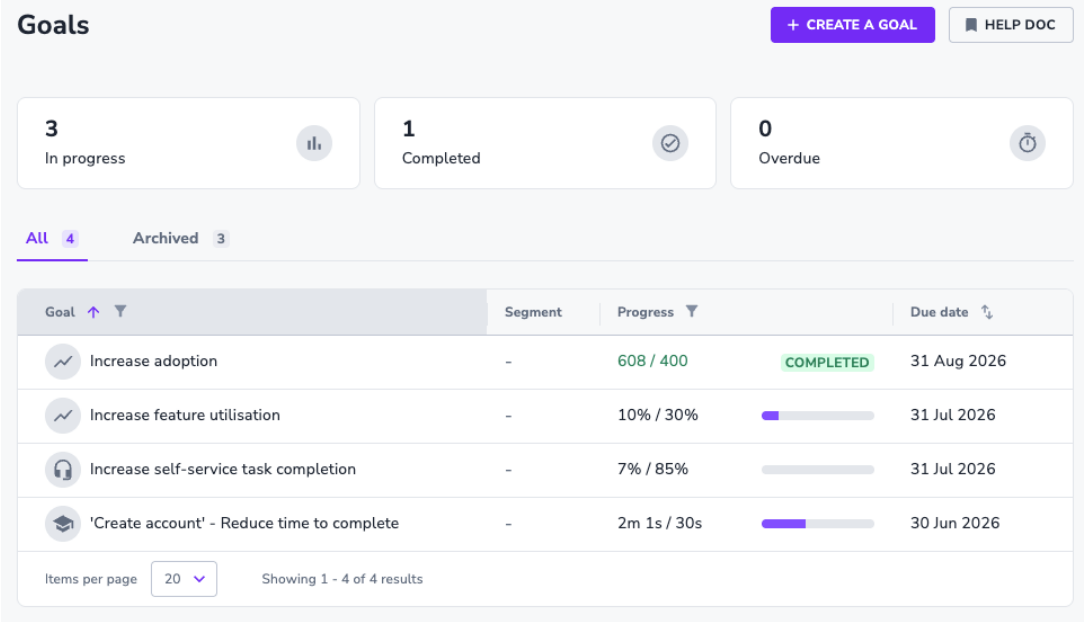
Goals connects Userlane's behavioral data to the specific outcomes your organization is accountable for. Define a target, a deadline, and an optional segment, and Goals tracks progress automatically. No manual exports or additional configuration required.

How it works

Each goal tracks one metric against one target. When creating a goal, you define:

- **The outcome area** - chosen from four options: reduce time/cost to learn, reduce errors, reduce support tickets, or drive usage/adoption
- **The target** - the value you are committing to reach
- **The deadline** - the date by which you expect to reach it
- **The segment** (optional) - a specific user population to scope the measurement to

Progress updates daily (overnight) using the same behavioral data that powers your HEART score.



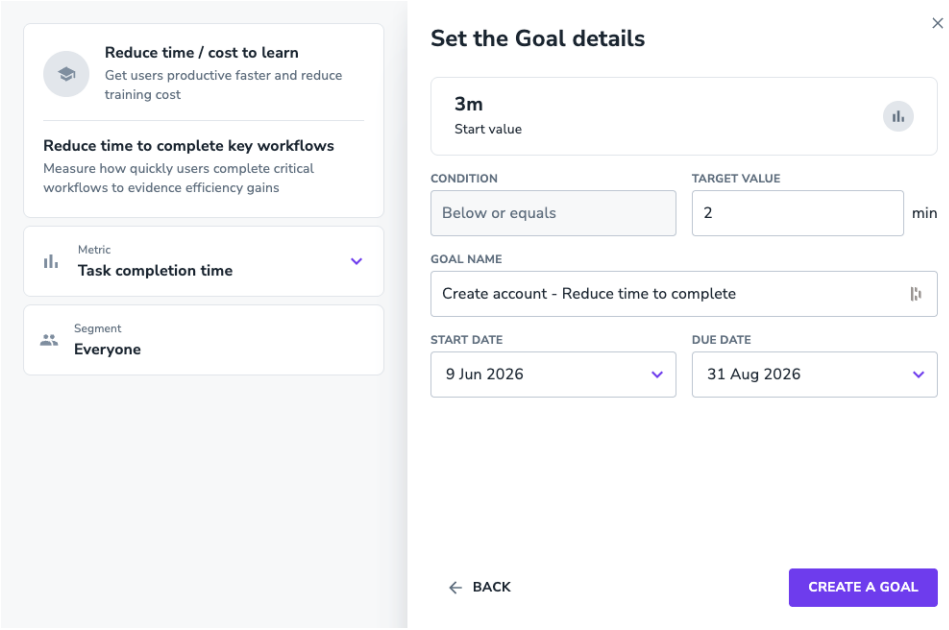
Creating a goal

To create a new goal:

1. Navigate to **Goals** in the left navigation of the Userlane Portal.
2. Click **Add goal**.
3. **Select an outcome area.** Choose from: Reduce time/cost to learn, Reduce errors, Reduce support tickets, or Drive usage/adoption. Select **None of the above** to continue without pre-filtering.
4. **Select a goal.** Choose a pre-built goal from the list. Each goal shows its name, a short description, and the metric it tracks. Select **None of the above** if none of the options fit.
5. **S**elect the specific Tasks, Guides, Validators, Tags, or Messages the metric will track. The options shown depend on the goal type.
6. **Set your goal details.** Enter a name, set your target value, choose a due date, and optionally select a

segment. The current metric value is displayed as your starting point and captured automatically when you save.

7. Click **Create a goal**.



The Goals view

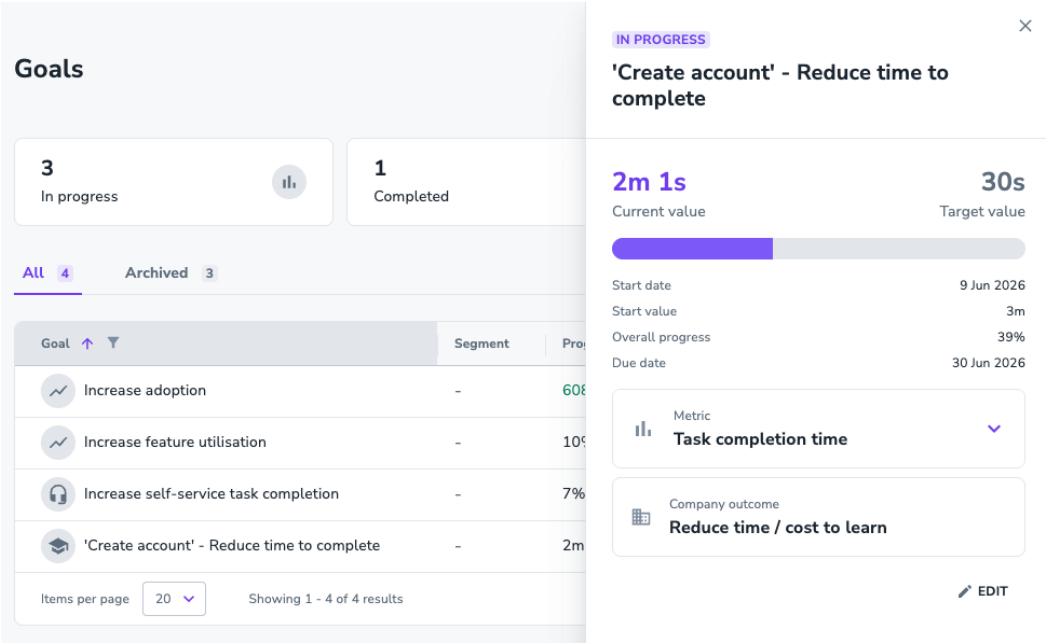
The Goals page shows all active goals for the current application. Each row displays:

- **Goal name and outcome area**
- **Segment** - the segment applied, if any
- **Progress** - a progress bar for in-progress goals, or a current/target value pair with a status badge for completed and overdue goals
- **Due date**

Three summary cards at the top of the page show the current count of in-progress, completed, and overdue goals.

Click any row to open the goal detail drawer on the right side of the page. The drawer shows the full progress record: start value, current value, target, due date, metric, and segment.

Archived goals are available in the **Archived** tab. They are read-only and cannot be reactivated.



Goal statuses

- In progress - Due date has not passed and target has not been reached
- Completed - Current metric value has met or exceeded the target
- Overdue - Due date has passed and target has not been reached
- Archived - Goal has been closed manually or automatically

Editing and archiving goals

Extending a due date: Open the goal detail drawer, click **Edit**, and select **Extend due date**. Set a new date and confirm. Extending the due date of an overdue goal resets its status to In progress.

Archiving a goal: Open the goal detail drawer and click **Archive goal** (or goals in progress, click **Edit**, and select **Archive goal**). Archived goals move to the Archived tab and cannot be edited or reactivated.

Goals are archived automatically 30 days after the due date passes without the target being reached, and 30 days after completion if not archived manually.

The target value, metric, and start value cannot be changed after creation. To change the scope of what is being measured, archive the existing goal and create a new one.

The Userlane AI Assistant

Last Modified on 10.07.2025

What is the Userlane AI Assistant?

The Userlane AI Assistant is an intelligent assistant that automates routine tasks, provides real-time suggestions, and seamlessly integrates into your existing workflows. By leveraging natural language processing, the Userlane AI Assistant is there when and where your users need it. To ensure a consistent user experience, the Userlane AI Assistant can be embedded across various systems at your organization via the same simple and straightforward Userlane implementation.

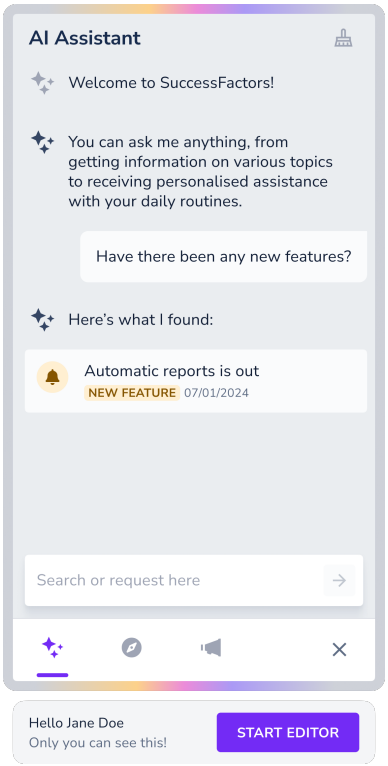
How can I activate the AI Assistant?

Please reach out to your Customer Value Manager to have AI Assistant activated or in case you have any questions.

In the Userlane Portal you will find a setting called 'Agentic Assistance' where you can enable the AI Assistant. You will need to apply a User Segment before you can activate the AI Assistant for your users. This allows you to choose a specific user group who will receive the AI Assistant, while all other users remain with the classic Userlane Assistant.

How is it different from the classic Userlane Assistant?

The Userlane AI Assistant introduces a conversational chat interface to our product and our users. Users can chat with the AI Assistant to ask for help in completing a task in their application. Much like LLM products that users are already familiar with, such as chatGPT, the Userlane AI Assistant will then find the most relevant answer to the user query from the existing Userlane content for that application. The AI Assistant can return Guides and Messages to the user query, as well as knowledge base articles if a knowledge base integration exists. The Guide can then be started as normal, but the AI Assistant will also automate all possible steps to help the user complete the task faster. In the event that no Userlane content is available to answer the user question, the AI Assistant will respond using its general knowledge to answer the user question.



What if I don't want to activate the AI Assistant?

That's no problem at all. It's up to you whether you'd like to activate the AI Assistant for all or some of your end users.

Will the AI Assistant be shown to all of my users?

No. We have curated a careful approach to how the AI Assistant will be rolled out to end users for this release. You will only be able to activate the AI Assistant for a subset of users who belong to a certain user segment. We recommend creating a new user segment with a smaller number of more advanced users in your application. We are also happy to support you in the user segment creation.

Do I need to prepare anything?

In order to enable the AI Assistant, you will need to select a user segment that represents your test group. Please review your existing user segments and, if needed, create a new one for the AI Assistant early access testing.

Otherwise, please review this help doc on how to optimize your content for the Userlane AI Assistant. This will ensure that the testing goes smoothly.

How to optimize content for the Userlane AI Assistant

Last Modified on 12.02.2025

How does the AI Assistant find content?

When a user interacts with the AI Assistant chat interface, the AI Assistant can offer Userlane Guides as a response to assist the user in completing their task. But how will the AI Assistant know which Guide is relevant to the users query?

The AI Assistant searches through Guide content to find the most relevant Guide to answer the users question. In order to do so as accurately as possible and improve performance, the Userlane AI Assistant will only search through the Guide Title, Intro Slide Title, and Intro Slide content.

The **Intro Slide** is the first step in a Guide that typically provides a short summary as to the Guides focus and is not attached to any UI element of the underlying application. The **task** or **purpose** of the Guide is typically present in these text areas of Guides, so we have refined the AI Assistants focus to search only here.

Guidelines and Best Practices

To help you optimize your Guides for the AI Assistant, we have compiled the guidelines and best practices below. Use these to review your existing content and adapt the texts as necessary or to guide you when creating new content.

Guide Title

- Craft the title of your Guide after the task it is meant to support users with
    - For example, ‘Create a new lead’
- Use action verbs as the first word in your Guide title to make it clear the Guide is to help users perform a task
    - Alternatively, begin your Guide titles with ‘How to…’

Intro Slide Title

- Mirror the Guide title to ensure it is clear that both the Guide and Intro Slide titles refer to completing the same task.

Intro Slide Text

- Use direct language that speaks to the user and explains the task that the Guide supports
    - For example, ‘This Guide shows you how to create a new opportunity in Salesforce.’
- Sometimes it might be useful to clarify in which situations this Guide can be useful
    - For example, 'For existing customers, new opportunities are necessary for Upsells and Expansions.'

Multi-Language Use Cases

Can users write to the AI Assistant in any language?

Yes, users can write to the AI Assistant in any language and it will respond to them in that language as well. However, the language of the Guides it returns is determined by the language detection checklist described here.

About Userlane Integration

Last Modified on 03.06.2025

Why use it

Userlane integration helps connect users to information through the Userlane Assistant. Leverage Assistant Search by linking it to your organization's knowledge base or collaboration tool. Use our Integrations page to easily add, manage, or remove connections.

Ready to get started? Select your platform below to learn more.

ℹ Integrations are not available for self-hosting users.

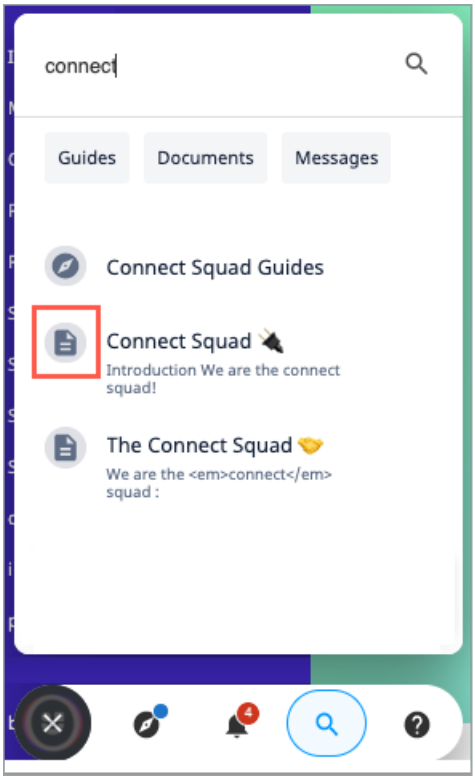
Supported platforms

- Confluence
- Zendesk
- KnowledgeOwl
- SharePoint

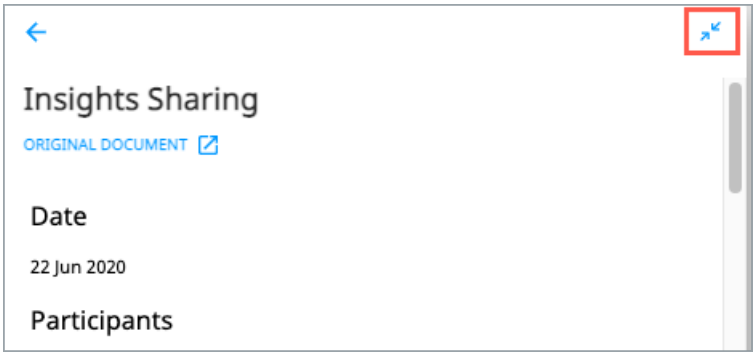
 Don't see your platform here? We are committed to supporting integrations with your favorite enterprise systems. If you would like to see yours featured in our ambitious roadmap, let us know!

How it works

After setting up the integration and enabling Userlane Search, your users can search for content without leaving your app. They'll see results with related Userlane content, like Guides and Announcements. Icons and filters make it easier to identify and narrow down the search results.



Users can view documents in the Search window while using your app. They can switch back to search results, perform new searches, or use the app normally. To keep the preview active, they can click the minimize icon and pin it to their screen.



If you haven't already enabled the Search feature for your users, you can learn more about its benefits in our Search through the Userlane Assistant article.

ℹ Some apps have IP filters that prevent the connection with Userlane. In that case, please reach out to our Customer Success Team.

SharePoint Integration

Last Modified on 01.06.2026

Your Userlane solution can be integrated with SharePoint providing a simple way for your users to search SharePoint content without context switching.

This article covers

- how it works
- what can be searched
- how to set it up
- Best Practices

How it works

When you search using the Assistant, it looks for information in both Userlane (like guides and announcements) and SharePoint. If your search includes results from SharePoint, you'll see a document icon.



Clicking on a SharePoint result will show you an improved view of the content. If the page is long and needs scrolling, you can open the original page in SharePoint by clicking the link below the document title.

ℹ Please note that this requires logging in to SharePoint, which means that users without such a login won't be able to open pages directly in SharePoint, and can only view the content from the Userlane assistant.

What can be searched

Due to the Microsoft Graph API limitations, we cannot search and retrieve all SharePoint content types.

We do search:

- SharePoint pages, but only the web text parts in page names, titles, and page content
- lists and list items

We cannot search:

- embedded web content, such as images and documents
- wiki pages

ℹ We are NOT indexing SharePoint content in our own database. Instead, we rely on the Microsoft Graph

API to get the results in real time. Therefore, it is **not** possible to compare search results from SharePoint's native search with the results that Userlane shows in the assistant.

ℹ When Userlane retrieves SharePoint content via the SharePoint integration, it**does not enforce or replicate individual end-user permissions** from SharePoint. Instead, the integration uses the permissions granted to the configured **Azure AD application** (via Microsoft Graph API application permissions) to fetch results.

Set-Up

Prerequisites

- Use the Microsoft Graph API and not SharePoint's own native API which is the way that is recommended by Microsoft as its no longer developed further because Microsoft strategically decided to replace it with Microsoft Graph API
- Be an Azure AD admin
- Userlane Admin or Moderator role permissions

 Limitation of the Graph API: Our integration only works for SharePoint online, not on-premise!

Enable Integration

1. Register Userlane as an application in the Microsoft Azure Active Directory (This can only be done by an Azure AD admin)

As a prerequisite for us to connect to SharePoint, Userlane has to be registered as an application in your organization's Azure AD tenant that is linked to SharePoint. It needs to have application permissions (not delegated ones).

 For the integration to work as intended, the Userlane application needs at least the `Sites.Read.All` permission for `Microsoft.Graph`, which has to be assigned under API permissions in the application registration portal. In addition, this will require consent from an Azure AD administrator in the Azure portal, which has to be repeated any time the permissions for the app are changed.

After registering Userlane in Azure AD, you'll need the following details to set up the integration:

1. Azure Active Directory Tenant ID: This is the ID of the tenant where Userlane is registered as an application.

2. Application/Client ID: It's the unique ID assigned to Userlane as a registered app, used for authentication with the Microsoft Graph API.

3. Application/Client secret: This secret is linked to the above ID and allows Userlane to authenticate with the Microsoft Graph API. You can generate it in the Certificates and secrets menu of the application registration portal. Remember to copy it's value (not ID) as it's only shown once during generation.

For step-by-step instructions on how to register an app in Azure AD, please use this Microsoft support article.

2. Enter the required fields in the Userlane Portal

To connect Userlane with SharePoint, follow these steps:

1. Log in to the Portal and navigate to

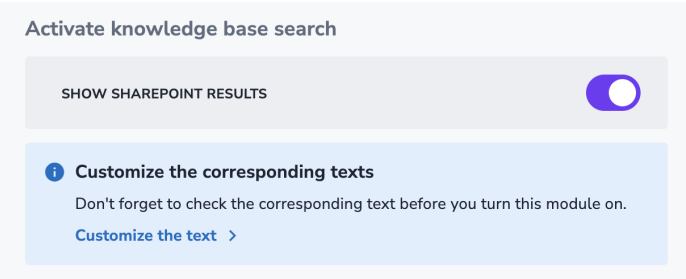
   Account > Global settings > Integrations

2. Choose the SharePoint integration from the "Available integrations" section.
3. Fill in the following details in the form that appears:
   - Integration name: This is how the integration will appear in the search settings.
   - SharePoint Subsite URL: Enter the URL of the specific subsite in SharePoint that the integration will search.
   - Azure Active Directory Tenant ID, Application/Client ID, and Application/Client secret value: These details were obtained in the previous step.
4. Once you've entered the information, save and connect.

> ℹ After setting up the connection, it will be tested. If any information is incorrect, you'll see an error notification below the fields. If everything is correct, the integration will appear in the "Connected integrations" section of the Integrations page.

3. Activate the integration for your property's search

In the Userlane Portal, go to **Customize > Search** and make sure that the search is activated for the property. **Additionally, ensure that the integration has been activated.** Scroll down to "Connect search with (SharePoint integration name)" and enable the toggle. This will activate the integration for the end user, and include the relevant SharePoint subsites in all searches done in the assistant.



4. Test the integration

Go to the application the property is set up for, and test the search in the assistant to check that the integration has been set up correctly and that you can see SharePoint search results.

Best Practice

- Restrict the integration to specific site collections or sub-URLs that contain the content you want shared.

Confluence integration

Last Modified on 29.12.2025

Connecting Confluence with your Userlane Assistant is a simple way to enable your users to search Confluence content without context switching.

This article covers

- how it works
- what can be searched
- how to set it up

How it works

Once the integration is set up and enabled, your users can seamlessly access Confluence content through the Search feature in the Userlane Assistant. Different content types are identified by an icon to help you quickly identify the source, which include Guides, Announcements, and yes, Confluence pages!

Search results and ranking

Alongside your Userlane content, search queries are applied to Confluence page titles and content text, using partial or complete searches.

Ranking

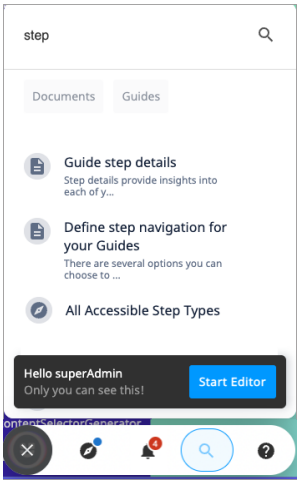
Search results are prioritized in the following order:

- Frequency of search term in title
- Frequency of search term in body content
- Most recent updated date and time

All content types are treated equally when determining their priority in search results.

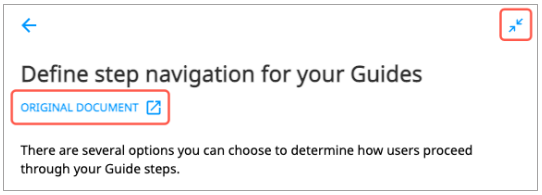
Viewing results from Confluence

Search results are listed in the Assistant in the priority order described above. Your users can easily identify Confluence content by the document icon. If their results include more than one content type, they can select content filters to refine their results to specific types (Guides, Announcements, and documents). A maximum of 50 results is displayed.



To view content in an expanded preview window, users simply select a document result.

With the document view displayed, they can continue to use your application as normal, return to the search results view, or perform another search. If they want to keep the preview active while using the application, they can click the minimize icon in the top right of the preview window to pin it to their screen. Expand it again to continue from where they left.



Good to know

If the content is too long for easy scrolling, users can open the original document in a new browser tab by selecting the original document link under the page title. This action might require a Confluence login, for example, if the page does not have anonymous access permissions.

Setup

Prerequisites

- API access to Confluence
- Userlane Admin or Moderator role permissions

Permissions

It's important to note that Confluence permissions for the integration are inherited from the Confluence user for which the API token is generated. If you want to ensure that the correct permissions apply, create a Confluence user specifically for the integration and set up the required permissions and restrictions before generating the

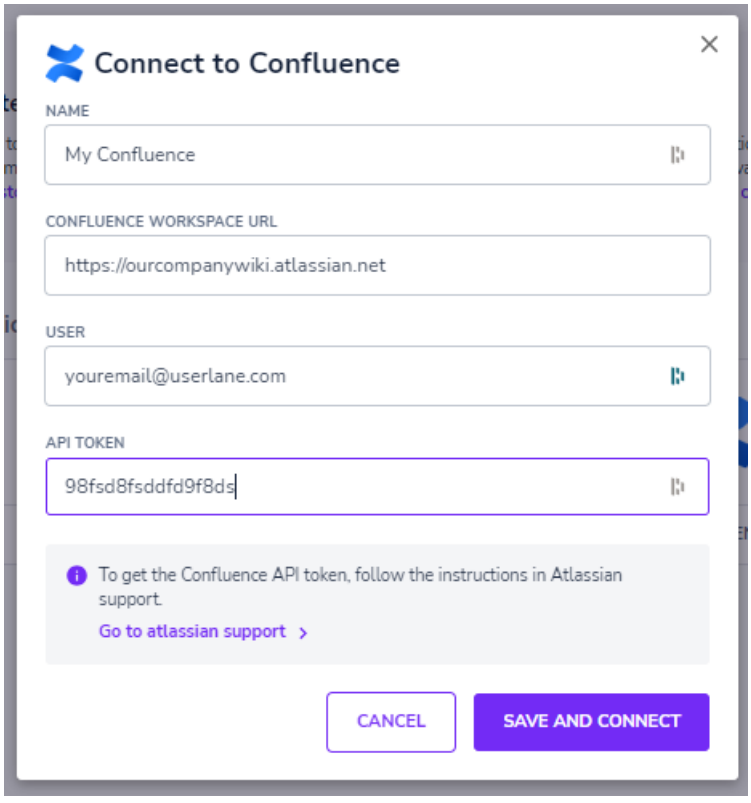
API token.

Generate an API token

Generate the API token by following Atlassian's step-by-step guide. If you haven't already created a Confluence user for this purpose, do so before completing this step.

Enable the connection for your organization

1. Sign in to the Userlane Portal and go to **Account > Global Settings > Integrations**.
2. Select Confluence under *Available Integrations*.
3. Enter the following details:
    - Name (optional): You can change the default name assigned to the connection to help you identify it if you use more than one
    - The URL of your Confluence, e.g. **https://ourcompanywiki.atlassian.net** (the link should end with .net)
    - The email address of the Confluence user that you defined for the integration
    - The API token created for the Confluence user



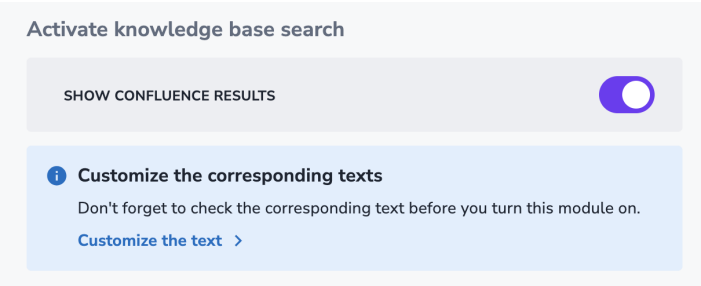
4. Select **Save and Connect**. Once the connection is created successfully, it appears under *Connected Integrations* on the Integrations page. You can later edit or remove a connection for maintenance purposes, or if it is no longer required.
   Note: If the connection cannot be established, an error message displays with details of the issue, e.g. URL could not be found, or an API token that did not work.

Activate the integration for your applications

Before enabling this feature, remember to customize or translate the default texts that are provided for search filters and document preview. You can do this from the Portal by going to **Customize > Texts**, then select **Search** under *Assistant*.

To connect Search with Confluence:

1. Sign in to your Userlane Portal and go to **Customize > Search.**
2. Under *Activate Search*, ensure that the **Display Search In The Assistant** toggle is enabled.
3. Under *Activate Knowledge Base Search,* enable the toggle for Confluence. If you have multiple applications, repeat these steps for each application for which you want to enable the integration.



Test the integration

Test your connection before announcing the Confluence integration to your users.

1. Open an application that has Search and a Confluence connection enabled.
2. Launch the Assistant then click the **Search** icon.
3. Enter a search query that should have matching results from your Confluence instance.

KnowledgeOwl integration

Last Modified on 16.04.2025

Connecting KnowledgeOwl with your Userlane Assistant is a simple way to enable your users to find relevant content without switching applications or opening more tabs.

This article covers

- how it works
- what can be searched
- how to set it up

How it works

Once the integration is set up and enabled, your users can seamlessly access KnowledgeOwl content through the Search feature in the Userlane Assistant. Different content types are identified by an icon to help them quickly identify the source; these include Guides, Announcements, and of course, KnowledgeOwl articles.

Search Results and Ranking

Alongside your Userlane content, search queries are applied to KnowledgeOwl page titles and content text, using partial or complete searches.

Ranking

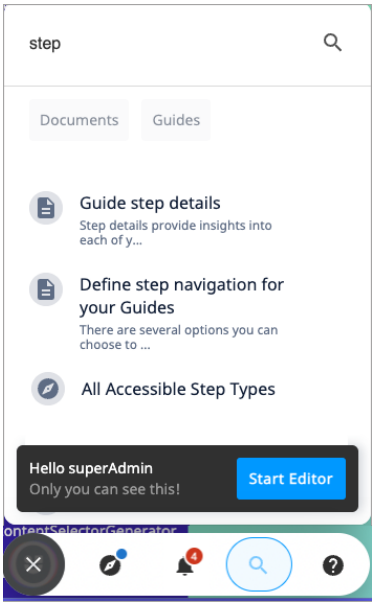
Search results are prioritized in the following order:

- Frequency of search term in title
- Frequency of search term in body content
- Most recent updated date and time

All content types are treated equally when determining their priority in search results.

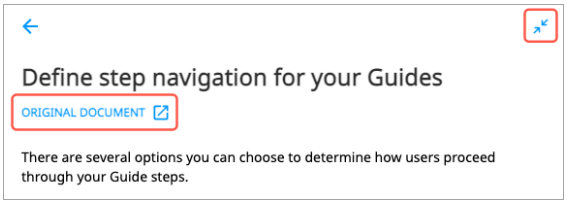
Viewing results from KnowledgeOwl

Search results are listed in the Assistant in the priority order described above. Your users can identify articles by the document icon. If their results include more than one content type, they can select content filters to refine their results to specific types (Guides, Announcements, and documents). A maximum of 50 results is displayed.



To view content in an expanded preview window, users simply select a document result.

With the document view displayed, they can continue to use your application as normal, return to the search results view, or perform another search. If they want to keep the preview active while using the application, they can click the minimize icon in the top right of the preview window to pin it to their screen. Expand it again to continue from where they left.



Good to know

If the content is too long for easy scrolling, users can open the original document in a new browser tab by selecting the original document link under the page title. This action might require a KnowledgeOwl login, for example, if the page does not have anonymous access permissions.

Setup

Prerequisites

- API access to KnowledgeOwl;
- Userlane Admin or Moderator role permissions

Permissions

It's important to note that KnowledgeOwl permissions for the integration are inherited from the

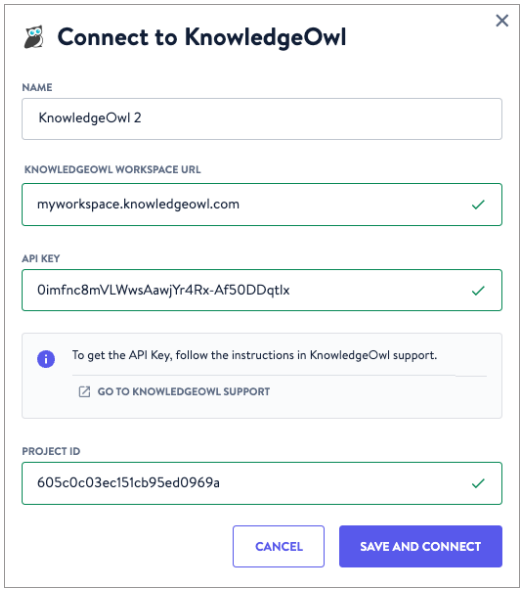
KnowledgeOwl project for which the API token is generated. If you want to ensure that the correct permissions apply, create a KnowledgeOwl project specifically for the integration and set up the required permissions and restrictions before generating the API token.

Generate an API token

Generate the API token by following KnowledgeOwl's step-by-step guide.

Enable the connection for your knowledge base

1. Sign in to your Userlane Portal and go to **Account > Global Settings > Integrations**.
2. Select KnowledgeOwl under *Available Connections*.
3. Enter the following details:
    - Name (optional): You can change the default name assigned to the connection to help you identify it if you use more than one
    - The URL of your KnowledgeOwl knowledge base, e.g. *helpcenter.mycompany.com*
    - Your KnowledgeOwl API key
    - Your KnowledgeOwl project ID; you can locate the product ID in your KnowledgeOwl knowledge base URL, e.g. https://app.knowledgeowl.com/kb/articles/id/606c0c03ec161cb96ed0969a.



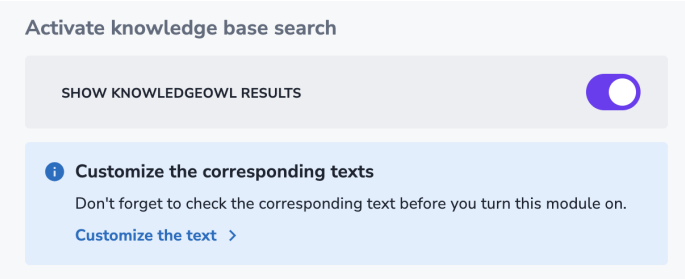
4. Select **Save and Connect**. Once the connection is created successfully, it appears under *Connected Applications* on the Integrations page. You can later edit or remove a connection for maintenance purposes, or if it is no longer required.
   Note: If the connection cannot be established, an error message displays with details of the issue, e.g. URL could not be found, or an API token that did not work.

Activate the integration for your applications

Before enabling this feature, remember to customize or translate the default texts that are provided for search filters and document preview. You can do this from the Portal by going to **Customize > Texts**, then select **Search** under *Assistant*.

To connect Search with KnowledgeOwl:

1. Sign in to your Userlane Portal and go to **Customize > Search.**
2. Under *Activate Search*, ensure that the **Display Search In The Assistant** toggle is enabled.
3. Under *Activate Knowledge Base Search,* enable the toggle for KnowledgeOwl. If you have multiple applications, repeat these steps for each application for which you want to enable the integration.



Test the integration

Test your connection before announcing the integration to your users.

1. Open an application that has Search and a KnowledgeOwl connection enabled.
2. Launch the Assistant then click the **Search** icon.
3. Enter a search query that should have matching results from your KnowledgeOwl instance.

Zendesk integration

Last Modified on 11.05.2026

Your Userlane solution can be integrated with Zendesk providing a simple way for your users to search Zendesk content without context switching.

This article covers

- how it works
- what can be searched
- how to set it up

How it works

Once the integration is set up and enabled, your users can seamlessly access Zendesk content through the Search feature in the Userlane Assistant. Different content types are identified by an icon to help you quickly identify the source, which include Guides, Announcements, and yes, Zendesk articles!

Search results and ranking

Alongside your Userlane content, search queries are applied to Zendesk content titles and article text, using partial or complete searches.

Ranking

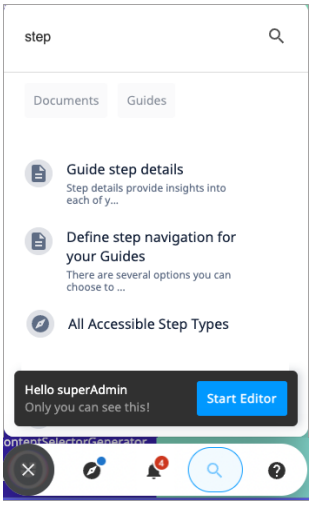
Search results are prioritized in the following order:

- Frequency of search term in title
- Frequency of search term in body content
- Most recent updated date and time

All content types are treated equally when determining their priority in search results.

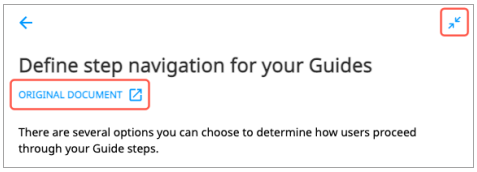
Viewing results from Zendesk

Search results are listed in the Assistant in the priority order described above. Your users can easily identify knowledge base content by the document icon. If their results include more than one content type, they can select content filters to refine their results to specific types (Guides, Announcements, and documents). A maximum of 50 results is displayed.



To view content in an expanded preview window, users simply select a document result.

With the document view displayed, they can continue to use your application as normal, return to the search results view, or perform another search. If they want to keep the preview active while using the application, they can click the minimize icon in the top right of the preview window to pin it to their screen. Expand it again to continue from where they left.



Good to know: If the content is too long for easy scrolling, users can open the original document in a new browser tab by selecting the original document link under the page title. This action might require a Zendesk login, for example, if the page does not have anonymous access permissions.

Set-Up

Prerequisites

- API access to Zendesk
- Userlane Admin or Moderator role permissions

Permissions

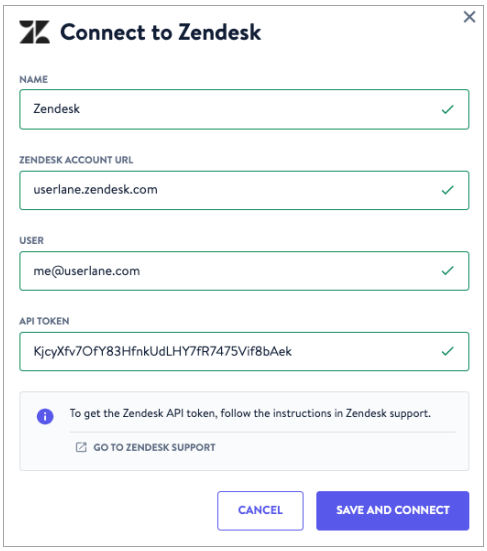
It's important to note that Zendesk permissions for the integration are inherited from the Zendesk user for which the API token is generated. If you want to ensure that the correct permissions apply, create a Zendesk user specifically for the integration and set up the required permissions and restrictions before generating the API token.

Generate an API token

Generate the API token by following Zendesk's support article. If you haven't already created a Zendesk user for this purpose, do so before completing this step.

Enable the connection for your organization

1. Sign in to your Userlane Portal and go to **Account > Global Settings > Integrations**.
2. Select Zendesk under *Available Integrations*.
3. Enter the following details:
    - Name (optional): You can change the default name assigned to the connection to help you identify it in your properties if you use more than one
    - The URL of the Zendesk workspace, e.g. https://ourcompany.zendesk.com
    - The email address of the Zendesk user that you defined for the integration
    - The API token created for the Zendesk user



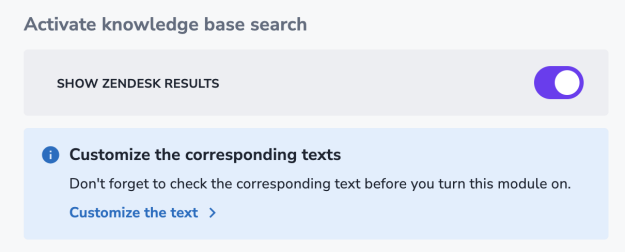
4. Select **Save and Connect**. Once the connection is created successfully, it appears under *Connected Integrations* on the Integrations page. You can later edit or remove a connection for maintenance purposes, or if it is no longer required.
   Note: If the connection cannot be established, an error message displays with details of the issue, e.g. URL could not be found, or an API token that did not work.

Activate the integration for your applications

Before enabling this feature, remember to customize or translate the default texts that are provided for search filters and document preview. You can do this from the Portal by going to **Customize > Texts**, then select **Search** under *Assistant*.

To connect Search with Zendesk:

1. Sign in to your Userlane Portal and go to **Customize > Search.**
2. Under *Activate Search*, ensure that the **Display Search In The Assistant** toggle is enabled.
3. Under *Activate Knowledge Base Search,* enable the toggle for Zendesk. If you have multiple applications, repeat these steps for each application for which you want to enable the integration.



Test the integration

Test your connection before announcing the Zendesk integration to your users.

1. Open an application that has Search and a Zendesk connection enabled.
2. Launch the Assistant, then click the **Search** icon.
3. Enter a search query that should have matching results from your Zendesk instance.

How to create a solid user segmentation concept

Last Modified on 29.12.2025

Why use it

Use segmentation to

- target specific user groups for your Userlane content based on their roles and accesses
- create a personalized user experience
- increase adoption of key features and processes
- collect more meaningful feedback
- continuously improve content effectiveness

How it works

The segmentation depends mainly on the information you have about your users. The more data you have the more granular you can segment your users.

This data is passed via SSO or via the Snippet and can then be applied consistently across all Userlane content types.

Segmentation rules should be defined once and reused across content wherever possible, ensuring a consistent experience for each user group.

Follow these steps to create a good concept to segment your users:

1. Analytics

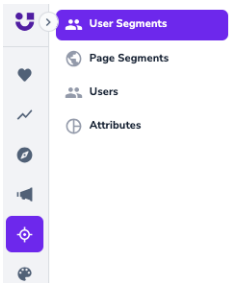
- What insights would help you drive engagement and processes?
- How do you differentiate users in reports or conversations?

2. Groups and characteristics

- How do you differentiate users within your application already?
    - Collaborate with your developers regarding the segmentation concept to ensure relevant attributes are considered and keys/names are consistently used and set up. Learn more about it here.

3. Set up your Target Audience

- Set up your attributes in the Portal, if applicable.
- Create your user segments here:



ℹ Good to know

You can combine conditions using AND or OR to create user segments.

Example:

You can create a segment with users who are admins OR paying users AND have been active within the last 14 days.

Applying a segment to a chapter affects all Guides in that chapter.

Applying a segment to a single Guide in a chapter adds additional conditions.

4. Content

- Do most of the users fulfill similar processes? Is there any data in forms that some users have to fill out differently than others? Or are there many parts that are only used by specific groups?
- You can segment single content items or whole chapters in case of managing Guides within the Assistant. What content is relevant to what group?

Examples

User roles

- Relevant if you have different user roles (e.g., administrator, regular user) in your rights management system.
- Recommended segmentation: Often used for Guide content at the chapter level.
- Points to consider: If individual functionalities can be assigned separately, allocate segments to individual content like Guides

Departments

- Relevant if users from different departments use the software differently or have varying information requirements.
- Recommended segmentation: Apply segmentation to single content items as there may be shared and department-specific content

Purchased package / Feature sets

- Relevant if you offer different product versions with varying features
- Recommended segmentation: Organize Guides in chapters based on purchased packages or segment single Guides based on included features. Segment other content items individually

Trial status

- Relevant if your product has a trial period
- Recommended segmentation: Create different chapters for trial and converted users

New users

- Relevant if your application frequently encounters new users who require additional onboarding
- Recommended segmentation: Add an extra chapter and targeted content items for new users

How to structure your content

Last Modified on 11.05.2026

Creating clear and structured content is essential for maximizing the value of Userlane and saving time and effort for your team.

Follow these best practices to ensure that your Userlane content is well-planned and aligned with your goals.

1. Define your goals and stakeholders

- Clearly understand and define your objectives for using Userlane.
- Identify the stakeholders involved and their respective goals.
- Determine the activities and tasks performed by each stakeholder.
- Prioritize the tasks based on importance and frequency.
- Address the stakeholders' most common questions.

2. Set priorities

- Identify the most significant pain points that need to be addressed.
- Determine which goals affect the largest user group.
- Evaluate which goals have the highest impact or save the most resources.
- Establish a baseline and assign metrics to measure progress.

3. Define content structure

- Identify the tasks necessary to achieve the highest priority goal.
- Align your Userlane content with the user's tasks.
- Structure your Userlane content accordingly.
- Determine where and to whom the Userlane content should be visible.
- Highlight specific Guides through tooltips with linked Guides or announcements, if necessary.
- Link Userlane content to other existing resources, by using an integration or application help.

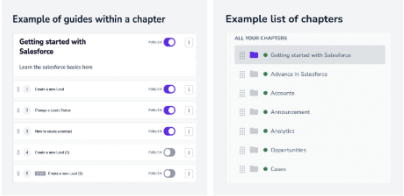
Best Practice:

- Create a table to organize goals, processes, and content types.
- Consider topics or expertise levels for grouping guides.
- Define the priority for this content type.
- Determine a Go Live Date per content type.

You can use a table like this:

In this tab you can create an overview of your guides, listing the overall chapter name and the guides that sit within the chapter.

- Is this guide a priority to go live with or will it come in a second or third wave?
- When do you expect to launch this guide/chapter?
- Who is responsible for creating it, what is the current status (e.g not started, part complete) etc?
- Will this be displayed to a particular user segment or a specific page segment?



	Priority	Go-Live Date	Responsible	Status	User Segmentation	Page Segmentation	Objective(s)
Chapter 1							
Navigate through the homepage	high	15 April 2024	John Smith	in review	all users	homepage only	Increase app adoption
Guide title							
Guide title							
Chapter 2							
Guide title							
Guide title							
Chapter 3							
Guide title							
Guide title							

4. Change your perspective and ask for feedback

- Step back and view your Userlane content from a new user's perspective.
- Ensure that new users are aware of Userlane and how to utilize it, e.g. informed via Welcome Slide, internal communication
- Verify that the content structure is easy to understand for new users.
- Assess the relevance of tasks shown in the guides for users.
- Check if tooltips effectively enhance user understanding.
- Evaluate if announcements provide value and useful information.

5. Understand and improve

- Utilize Userlane's analytics to gain insights into user interactions.
- Continuously monitor and analyze the performance of your Userlane content.
- Use the analytics data to make informed improvements and simplify software usage.

ℹ Regardless of your goals, always keep in mind that your users should

- Understand the capabilities of your software.
- Experience quick wins along the way.
- Interact with key features to fully appreciate your solution.
- Achieve their desired results as quickly as possible.

By following these best practices, you can create effective Userlane content that guides users towards success while optimizing their experience with your software.

How to onboard users effectively

Last Modified on 12.01.2024

Users aren't as interested in the product as they are in striving for the best result for their goals. Effective onboarding, easily and efficiently, guides users to their desired outcomes as quickly and as effectively as possible - so let us find out, how you can best onboard your users!

How it works

The onboarding phase creates constant associations with your brand and product and sets the mood for the entire upcoming customer journey.

Onboarding trial users is a lot more than simply creating a user-friendly environment that is easy to master. Successful onboarding involves different stages that help with specific goals:

1. Product learning curve
2. Product engagement and habituation
3. Product success enablement
4. Product value realization

In this article, you will learn what main tasks arise from these stages and how to master them.

Stage 1: Product learning curve

Make your users understand and use your product in the most efficient way to ensure that they realize its full potential.

How to do this?

- Enable your users to sign up and **move on to the actual interface quickly**
- Take **full control** over the initial steps your users take to make sure they **achieve some quick-wins**
- Make your users **familiar** with key elements and features within your application and ensure that their attention is **focused** on the feature they're currently learning
- Clarify the workflow's structure and how to **integrate** other solutions
- Prevent users from leaving your platform by showing them the most **efficient** way to get from A to B
- Let your users follow a specific **checklist** of tasks and guarantee that they know where they are in the onboarding process

Stage 2: Product engagement and habituation

Create habit-forming patterns, so that your users keep using the product

- Build the basis for **engagement** and **activation**
- Make your users **accomplish actual tasks** immediately so that they directly see results
- Motivate your users and reward them for their **progress** and completion of onboarding guides
- Block advanced features to ensure that your users **interact successfully** with basic functions first.
- Create a **smooth** experience to prevent churn caused by delays and frustration
- Set a **positive mood** for future relationships and make them feel **excited to continue working with your application**

Stage 3: Product success enablement

Make product success easy to achieve and repeatable by knowing your customer's objectives and enabling them to reach them effortlessly

- Make your users **understand** the extent a software can help them reach their goals
- **Eliminate confusion and insecurity**
- **Segment** your users, address them **personally,** and adapt the onboarding as well as the user experience according to their **needs**
- **Follow** and **monitor** your users' behavior and use the collected data to provide adequate information as well as support when insecurities arise
- **Interact** in real-time with users that get stuck and guide them to the next step
- Continuously train users and surprise them with new functionalities based on **their feedback**

Stage 4: Product value realization

Make clear what the actual value of your solution is by showing them the results they can achieve with your product

- Point out what the product is designed for, what its **benefits** are, and what makes your solution **unique**
- Show the **personality** of your brand, be authentic and real
- Ensure that your users find a way to **reach their goals** as soon as possible
- **Prove** that you can actually **meet your customer's expectations** and **over-deliver**
- Show the user the **value proposition** of your solution
- **Sell your solution** as if you were pitching it directly to the user

This, and actually much more, needs to happen fast. Very fast!

People's **attention span** is limited and you need to continuously offer **variety** as well as **novelty elements** and draw the attention of trial users to their roadmap towards their goal.

You need to

- start with small steps presenting major and basic features
- quickly allow users to reach **full proficiency** within your product.
- **eliminate any frustration points**
- allow users to feel good about their choice.

How to build successful Guides

Last Modified on 03.03.2026

Why use it

Overall, good guides contribute to a positive user experience, increased user adoption, improved productivity, reduced support dependency, standardized training, user confidence, and the ability to measure and optimize user success.

Before getting started

- **Make sure the content of the Guide is relevant to your users.**
  - What do your users want to achieve/learn? What are their pains?
  - Who should be addressed with this Guide?
- **Be clear on your goals.**
  - What do you want to achieve with the Guide? How will you measure success?
- **Set a communication guideline fitting your company culture.**
  - What style do you use when communicating with your end-users? Is the style more formal or informal?
- **Review and improve your Guides regularly.**
  - Is the Guide as successful as expected? Are users achieving what they need to achieve?
  - How happy are users with the Guide?

How to create a good Guide

1. **Add an actionable title** and match the title to the goal of the content. The title and sub-title should answer the “what” to expect in this Guide and can prevent users from starting a Guide unintentionally.

2. Define the amount of possible interaction of your users.

A) If you want to introduce users to your app or a feature but don’t want them to get confused, reduce the amount of interaction.

Use explanation steps with prevented interaction to show the user around. Use the “Specific Value” option in a step to ensure the user only creates a test object. We also recommend this for the first Guide(s).

B) Improve the quality of interactions with the underlying application. Use our automation and validation tools to support your users in their learning process. In that way, you don't only teach your users the processes, but you are also ensuring data quality.

Use the “Any Value” option to allow users to decide what they want to type into an input field. Or "Specific Value" option to validate what users can type in an input field.

3. Only have user-relevant information in your Guide and keep it simple.

Ask yourself for every step and every word that you add:

- Does this step or text add value for the user?
- Is this information necessary for the goal of the Guide and the user at this moment?
- Does this information help the user to achieve the goal of this Guide?
- Can external resources be linked?

4. Avoid long overview tours, but reduce them to the relevant basics. We recommend max 20 steps per Guide.

5. Avoid cognitive overload. Stick to a clear and consistent top-down structure in the order of your Guides and chapters (from general to specific information). Whenever possible, only write one piece of information into one step box. Use info boxes to highlight specific information.

6. Keep the user's attention and motivation. Add praises, Call-To-Actions, emojis, GIFs, images, or whatever keeps the user motivated whenever the tone is appropriate.

7. Use the first and last slides effectively. Use the first slide to set expectations or goals. Use the last slide to wrap up, praise, link additional information, or include a Call-to-Action.

8. Make your selectors stable. Should you notice that a Selector cannot find or highlight an element correctly, use our Userlane Selector Troubleshooting Checklist.pdf to diagnose.

Checklist

Check whether your Guides have everything they need. Find our Guide Checklist here.

How to create a good Announcement

Last Modified on 12.03.2024

An announcement is a push message announced within the external application via the Userlane Assistant.

How to create a good Announcement

1. Have a clear strategy and plan when to use Announcements.
2. Avoid having too many Announcements activated in parallel. Otherwise an end-user only clicks through them and the impact is lost.
3. Use an intuitive name for your Announcement.
4. Clearly define the goal of this announcement - Is it supposed to inform or a call to action?
5. Keep the content as short as possible and don't make it redundant.
6. Provide an announcement text for each application language to communicate with your users in their preferred language.
7. Target the right audience for your announcement. Consider setting up user and/or page segments.
8. Add images, links or Guides where applicable.
9. Schedule your Announcements so it reaches your end-users at the right time at the right place but also only until a certain time.
10. Use an Announcement cadence to promote and prompt the completion of a task/ process.
11. Change the Announcement category name in the Userlane Portal to align with announcement goal. You can find more information on this here.
12. Be cautious where to publish the Announcement, so it does not distract a user from completing an important process. You can use data from Engagement for this to better understand where your users need to spend more time and then create a Page Segment or User Segmentation accordingly.

ℹ For optimal results, combine an Announcement with Guides for new feature launches on your application.

Possible Use Cases

Announcement before Rollout

When going live with your Userlane Guides you can share an announcement with your end-users to raise awareness for this new support resource.

- Send an announcement presenting the point of contact for additional support
  - Remember: Userlane is new to them and they might have some questions
- Send an announcement one day after first time active in combination with not having started the first tour (linked to welcome slide) and remind him on the new capability
  - Remember: You have spent time and energy on the Guides. Let's make sure they make use of them.

Example: Announcement for new functionalities

When having a new functionality available in your application you can raise awareness and educate your end-users about it.

- Create a Guide to direct through the new functionality
- Create additional resources, e.g. release notes, articles about the new functionality
- Link the Guide, Release Note, Help Documentation, Best Practices to an Announcement
- Remind end-users about available resources, e.g. Help Documentation, intranet

How to create good Tooltips

Last Modified on 21.04.2026

Why use it

Tooltips allow you to **explain** and **highlight** elements of the underlying application when a user interacts with the external application.

To choose the right tooltip type, choose the use case you wish to cover.

Example:

If you wish to explain a feature, use the hint type.

If you wish to highlight a feature in the underlying application, use the beacon type.

> ℹ For optimal results, always combine Tooltips with Announcements and Guides for new feature launches on your application.

Tooltips: Hints

1. The hint type provides extra information to help users with processes, unknown words, features, or error messages.
2. Keep hints short and concise, avoiding redundancy.
3. Provide hints in different languages for user preference and better communication.
4. Understand user needs and struggles, explaining non-obvious elements with hints.
5. Don't cover up important content or functionality with hints.
6. Avoid blocking users from completing tasks by placing crucial information only when they hover over an element.
7. Use hints for unlabeled icons or buttons when contextual help is needed.
8. Target specific pages using page segments for relevant hints.
9. Customize hints for different user groups, such as new or experienced users.
10. Assist users in filling out lengthy forms by explaining what to add in each field.
11. Explain specific error messages using content selectors.
12. You can combine a Hint with a Guide to make sure that an end-user starts a process at a specific point.

Hints and hover menus

Avoid placing Hint tooltips directly on elements that trigger a hover menu (e.g., top-navigation dropdowns or hover-triggered flyout panels). When a user moves their cursor from the annotated element to the tooltip box, the hover menu may close because the cursor has technically left the trigger element. This means the user cannot read the tooltip and interact with the menu at the same time.

⚠ Recommendation: For elements with hover-triggered menus that close on mouseleave, use a Beacon tooltip instead. Beacons activate on click and persist until dismissed, so they do not interfere with hover state behavior.

If you need to annotate an element inside a hover menu:

1. Place a Beacon on the trigger element (e.g., the navigation item) to draw attention first.
2. Link the Beacon to a Guide that walks the user through the hover menu interaction step by step.
3. Avoid placing persistent Hint tooltips inside menus that require continuous hover to remain visible.

Tooltips: Beacons

1. Use beacons to grab users' attention towards new features.
2. Boost engagement by highlighting less-utilized features with beacons.
3. Employ beacons in the app for specific calls to action, like form filling or error reporting.
4. Manually position pulsating icons when important elements are covered.
5. Provide beacon text in different languages for better user communication.
6. Show beacons only on relevant pages that match URL conditions using page segments.
7. Customize beacon display based on user groups, such as those who haven't interacted with the new feature guide.
8. You can combine a Beacon with a Guide to make sure that an end-user starts a process at a specific point.

Best practices for setting up your NPS Survey

Last Modified on 04.03.2024

NPS is the key to understanding your users' opinion about your application. With Userlane you can collect user responses right in your application.

Check out these 4 tips below on how we recommend setting up NPS with Userlane:

1. Do not change the NPS question

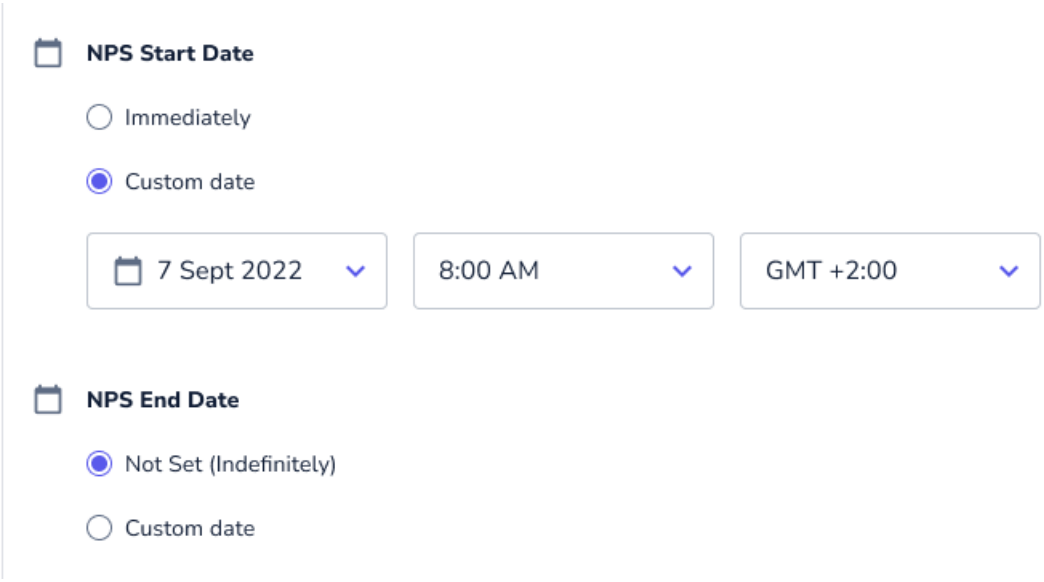
NPS methodology works by asking the user how likely they are to recommend your application. Changing the question entirely to something unrelated could lead to skewed results.

2. Set up reminders for those that did not respond

To ensure a beneficial number of responses, use our automatic reminders. Sometimes users will not have the time to respond, with this setting you can encourage them to respond by popping the question again.

3. Set up your NPS without the end date or choose the far end date

Your manual effort is reduced because the NPS survey is automated. After a user responds, the NPS will disappear and pop up automatically for them after 6 months again. In order to get the responses automatically twice a year from the end user, set up the end date to "not set" and the NPS will run until you turn it off.



4. Use segmentation to target your users

If you want to include or exclude certain groups of users, we suggest you target a specific user segment.

For example, if it is helpful to exclude users from the NPS survey if they have just joined your application - ask them once they've gained a bit more experience. You can set up the segments accordingly.

Userlane go-live checklist

Last Modified on 27.05.2026

Use the checklist to make sure you are considering the most relevant topics before going live with Userlane on your application.

1. Make sure Userlane is implemented

- Implementation options
- Application URLs are set
- if needed: Exception URLs for HEART are set

2. Style Userlane your way

To ensure Userlane matches the way you present and talk to your end-users, you can adjust Userlane so it matches your brand.

- Colour configuration
- Default text configuration
- Avatar image configuration
- Welcome Slide configuration

3. Visibility of Userlane

To ensure Userlane is shown where and to who it is supposed to be shown to make sure to check these settings.

- Minimum screen size setting for whole Assistant
- Page segmentation check(incl. global segment, e.g. excluding Login Page)
- User segmentation check for Guides

ℹ If your Assistant is not visible to your users, have a look at this checklist!

4. Languages

Define in what languages your Guides and Assistant should be available.

- Translations available
- Languages published
- Languages tested

5. Content & Communication

Make sure you have everything set up and have a clear plan on how to engage your users.

- Tooltips
- Validators
- Guides created
- Guides tested
- Guides published
- Announcements
- Surveys
- NPS
- Internal communication regarding Userlane Go-Live

⚠ Remove all test and trial content created while exploring Userlane content types.

6. Offer support to your end-users

Make it easy for your end users to receive support and easily find what they need.

- Error notification configuration
- Search tab configuration/Integration configuration
- Support contact/Help center link configuration

7. Activate Userlane

Check with your Customer Value Manager to ensure all is set and you can go live.

Alert notifications

Last Modified on 11.05.2026

About Alert Notifications

Alerts indicate that errors are recurring on a specific Guide step.

Alerts are triggered whenever errors on a step meet the default error threshold of five occurrences within eight-hours. If you want to adjust these settings, reach out to your Customer Value Manager.

Why use it

Alerts provide quick feedback when users are struggling with a step within a Guide.

This could be caused by

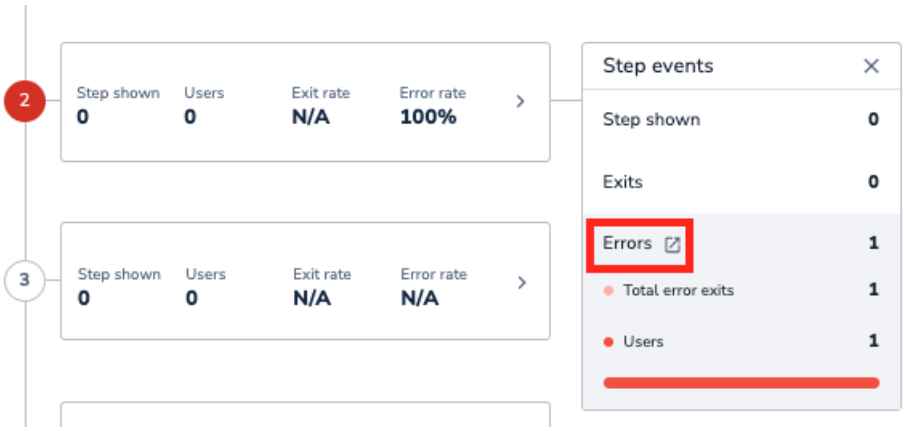
- a recent change within your application regarding the HTML code
- behaviour based on a specific role or setting of an end-user
- behaviour on a specific browser
- behaviour on a specific screen size

Jump to the troubleshooting options.

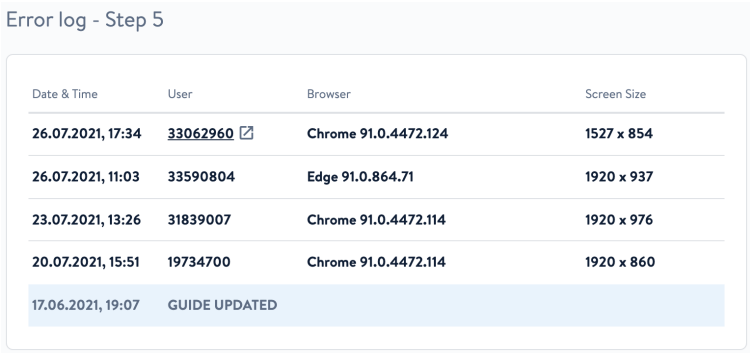
How it works

When an alert is triggered, we will notify you via email but you can also see it directly in your Guide overview in Userlane's Analytics dashboard, the Manage section or in the Editor.

Go into the Guide Analytics and click on the flagged step.



Open the Error Log.



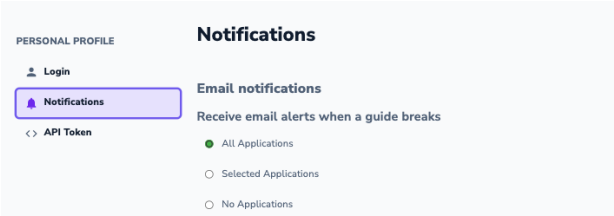
Click the user ID to find more information about that particular user.

> ℹ **Important**
> - Any new save or update to a Guide (e.g. updating segmentation, texts) resets its alert notification even if the cause of the error isn't resolved.
> - The emails are sent only once after an alert was triggered for a step. They will not be sent again until the Guide has been updated and a new alert gets activated.
> - Only Admins and Moderators can receive these notifications.

Adjust E-Mail Notifications

You can change the email notification setting for each Application in your Userlane Account.

Sign in to **Userlane Portal > Settings > Notifications**



Troubleshooting errors

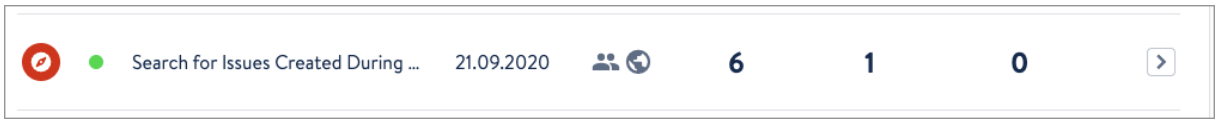
Here are some steps to help you effectively handle alert notifications. Below, we discuss each step in detail:

- investigate the source of the errors
- look for the issue in the current step
- check the previous steps
- check Portal settings
- check account setup
- test
- other causes

Investigate the source of the errors

First, identify the step that triggered the alert in one of the following ways:

- Click **Open Step Details** in your alert notification email. This displays the *Step Details* page in your dashboard.
- Go to **Analyze** > **Guides** in your dashboard then look for the alert symbol under *Individual Performance*. Click the alert symbol to view the *Step Details* page.



- Open the respective Guide in the Userlane Editor and click through it until you get to the step with the alert symbol.
- Review what users have caused this error.

Once you identify the trigger step, you can determine how to resolve the cause of the errors.

 Errors can be in the alert trigger step or in a previous step.

Look for issues in the current step

Open the Guide in the Editor:

- **Does this step highlight the right element?**
  - Review the Code Selector. Consider reselecting the element, simplifying the selector or specifying the selector. Learn more here.
- **Are the step options appropriate?**
  - Check the interaction type chosen and possible skip settings. Learn more about the step types here.

Check the previous steps

Open the Guide in the Editor:

- Are your users led to the correct step?
  - Check how a user is navigated to the step.
- **Does this step highlight the right element?**
  - Review the Code Selector. Consider reselecting the element, simplifying the selector or specifying the selector. Learn more here.

 If Next-Button steps are not found, the error system will skip them and only trigger an error on the first interaction step that follows them (e.g. Left-Click Step). This means that the error might have been triggered a number of steps before the step that is marked with the error.

Check your settings in the Portal

Open the Portal and Review the Settings for the Guide and Chapter:

- What languages are published?
- What User and Page Segment are applied?

Errors caused in a specific user setup

Review the Users that caused the error:

- What characteristics do they have in common?
- What limitations could they have within your application?
- Will everyone see the same content?

If you identify differences, consider:

- using optional steps
- adjust your segmentation for the guide

Test the Guide on different browsers

On the Portal, you will find information on every user that caused an error.

- Is the issue only appearing for specific browsers?
    - Try choosing the bigger element by using 'change positioning' or by manually adjusting the Userlane selector (technically advanced).

Other causes

Errors may be caused by issues unrelated to your Guide setup:

- internet outage for user
- application being down

You can make a small update to a Guide and save it to reset the alert and determine if the problem recurs.

Guide Checklist

Last Modified on 12.01.2024

About this Checklist

This checklist provides a comprehensive guide on optimizing

- the functionality,
- text & wording,
- engagement of Guides and
- language handling.

It covers various aspects such as setting clear objectives, segmenting users, ensuring stability, and incorporating interactive elements. Additionally, it emphasizes the importance of user satisfaction and multilingual support.

Implementing these strategies can enhance the effectiveness and user experience of Guides across different platforms.

Functionality

1. Does the Guide have a clear goal?

2. Does the Guide have less / around 12 steps (recommended maximum: 20)?

3. Does the Guide work on every page (starting point) where it is visible in the Assistant? If not,use context-based segmentation to only show it on the right pages.

4. Does the Guide work for every user group (users with different features, limitations, etc.)? If not,segment it to the right users.

5. Stability: Is the Guide safe from breaking accidentally by clicking somewhere outside the Guide?

Text & Wording

6. Is the title of your Guide clear and actionable? Does it answer “what” the Guide is about, what its goal is?

7. If you have a subtitle, does it tell “why” the user should do this tour?

8. Does the first slide of the Guide tell the user about the content they’ll experience? Is it motivating? Tell your users why they should do this tour.

9. Does the last slide wrap up what your users have achieved? Does it praise the user for what they have done?

10. Does the Guide have a friendly and clear tone that fits your company style?

11. Look at your texts: Are there any sentences/parts that don't contain relevant information? Delete/shorten any sentences that don't add value.

Engagement

12. Are your Guides as interactive as applicable to the content?

13. Did you add media elements or other relevant resources, e.g. help center articles to improve the user experience?

14. Are your Guides integrated into and accessible through multiple channels (help docs, emails, support, etc.)? For example, use link boxes, trigger commands, and the promotion feature.

Languages

15. Have you translated the Guides into all languages needed? If not, add and manage multiple languages.

How to create good Tags

Last Modified on 21.09.2025

Why use it

A Tag marks a single element that should be tracked to measure a user interaction within the customer application.

It is found on the HEART analytics > Task success page > Tags button.

- To learn more about Tags in Userlane, check the following section on Tags in the Editor.
- To find out more about understanding the impact, opportunities, and risks regarding underlying application usage, please check the following section on HEART.

Before setting up Tags

- To work with Tags, the HEART **must be enabled** in the Analytics setting located in the Portal.
    - You can enter the webpages where you wish **not** to have HEART analytics running and update the exceptions **before** enabling HEART.
- **Research the processes** within your organization and how they are completed with the help of the underlying application.
- Find out which elements (e.g., buttons) **emphasize the best indication of important feature adoption of your application**.
    - are they located on multiple webpages? Do you need to differentiate the elements per language?

How to create good Tags

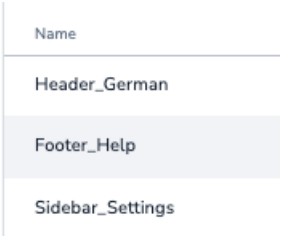
1. Use Tags to understand how many times a process is started and how many times it has ended. (Start button vs Submit button).

2. Place tags along a process (Onboarding) to access where users are dropping off.

3 Understand if the users are still accessing the wrong/deprecated section/button/functionality to correct the behaviour.

4. When creating Tags, Userlane will automatically assign a name to each Tag. We **recommend** deciding on a name structure as early as possible. In that way, you can easily navigate later to the Tags list view which will contain dozens of entries.

Example:



5. If you wish to track an element on a single page or multiple pages, use page segmentation.

6. If your website is multilingual, and you wish to track the user interactions with a single button available in different languages, create two different Tags, and use the Content Selector for each of them to track only elements that contain words in the respective language.

After you set up Tags

Access the Task Success page > Tags button in the Portal to understand how users interact with the tagged elements.

You can deleteTags you do not want to have tracked anymore. They will keep existing in your analytics, just with a "deleted" label.

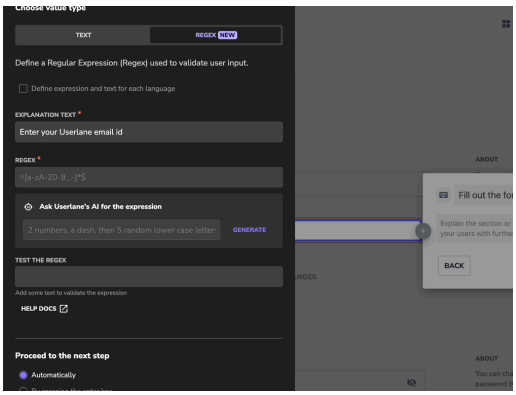
We recommend you to check for the Tags that stopped receiving interaction, that can be an indicator of either low adoption or a selector change due to the underlying app UI update.

How to use Regular Expressions for Data Validation

Last Modified on 12.01.2024

About Regular Expression

A regular expression (regex) is a sequence of characters that helps you find specific patterns in text. It's commonly used to validate data and ensure its accuracy.



Why use it

Regular expressions can be useful in various scenarios. Here are a few examples:

1. Checking if a text contains your organization's domain.
2. Preventing users from submitting empty form fields.
3. Enforcing a specific format for number fields.
4. Limiting the number of words in a text box (e.g., not more than 10 words).
5. Validating age ranges (e.g., 18-65).

Ultimately, the goal is to collect correct and useful information for your processes.

Example

You want to ensure your colleagues always use the 24-hour format when submitting the expenses of a past business event.

The following regex achieves that:

```
^([01][0-9]|2[0-3]):[0-5][0-9]$
```

In this scenario, the user must use the HH:MM time format in the input field to proceed.

ℹ Important

First, try using the Generate functionality as explained in the help article. Then, use the examples below to improve or adjust the automatically generated Regular Expression to suit your needs.

How to use it

To better understand how basic regular expressions work, let's look at some simple examples:

RegEx	Result	Explanation
abc	abc is allowed	only abc is accepted
Munich|Berlin|Hamburg	The user needs to type in Munich or Berlin, or Hamburg to get the result validated.	"|" is used as "or"
[a-z]	A23BCDeF	At least one small letter from a to z needs to be detected in the string
[0-9]	1user1	The user needs to type in a string that contains at least one number
[0-9]$	31231031231...	It accepts only strings
[0-9] \$$	25$	\ is used to escape a special character. In our case, the $ sign. The second $ shows where the string ends
^[A-Z]	Userlane or USERlane are allowed. uSerlane or userLANE are not allowed	You need to start the string with a Capital letter. It can contain more capital letters.
.	!Userlane#:; is valid	"." is a wild card. If used, any character is accepted in the string.
.{3,}	At least three characters need to be typed in	{3,} means that min 3 characters need to be typed in.
^.{12,20}$	Any string between 12 and 20 characters	{12,20} means the string must contain between 12 and 20 characters. ^ is used to say where the counting starts, while $ shows when the counting ends.
^[1-9]{1}$\|^10$	Validate a number from 1 to 10	^[1-9]{1}$ tells us the first number is 1 to 9. | means or ^10$ tells us that also 10 is accepted
^[1-9]?[0-9]{1}$\|^100$	Validate a number from 1 to 100	The "?" tells us that the preceding character is optional. If it wouldn't be there, then the user would be allowed to type in numbers only from 10 to 100

Now, let's take another look at the example from above:

```
^([01][0-9]|2[0-3]):[0-5][0-9]$
```

The first part of the regular expression *^(([01][0-9]|2[0-3])* tells the user that a value between 00 and 19 is needed or between 20 and 23. In the second part of the regular expression, *[0-5][0-9]$*, a value between 00 and 59 is expected. In that way, only entries in the format of HH:MM are accepted.

Advanced examples

RegEx	Explanation
^[-\w]+(?:\W+[-\w]+){1,4}\W*$	To proceed, type in 1 to 5 words.
^.+?@.+?\..+$	It can be used for email validation. The pattern checks if "@" and "." exist.
((1[0-2]|0?[1-9]):([0-5][0-9]) ?([AaPp][Mm]))$	It validates if the following time format HH:MM 12-hour AM/PM is used.
/^[0-9]{5}([- /]?[0-9]{4})?$/	Checks if the US Postal code was entered correctly.
^(?!01000|99999)(0[1-9]\d{3}|[1-9]\d{4})$	It checks if the entered German Postal Code exists.
^DE[0-9]{20}$	It checks if the German IBAN was correctly entered.

Directing your users to the right pages

Last Modified on 03.05.2024

Why do it

AppDiscovery gives you insights into the applications your employees are using and therefore, where they spend their time.

But what should you do if you notice they're using an application they shouldn't? Maybe you already pay for a project management tool, and they're using a different one, or maybe AI tools like ChatGPT haven't yet been cleared by your IT department for regular use.

This use case comes up often with Userlane customers, so let's dive into how you can leverage Userlane to inform and guide your employees to the correct applications.

Here are the points you need to consider for this process. In this article, we will touch upon each of them in detail:

1. Review and understand
2. Promote the correct pages
3. Show value of the correct pages
4. Monitor change

1. Review applications in use

Use Userlane App Discovery to get an overview of the applications your employees are using.

- Do you see any applications that potentially pose a security risk? (eg. AI-powered tools not yet cleared by your IT security)
- Do you see any applications with duplicate use cases? (eg. your company already pays for Jira but you see employees using Asana or Trello)

2. Get more insight

If you answered yes to either of the above questions, add the applications in question to Userlane to gain more insight. To add a discovered application to Userlane is quick and easy, simply click the 'Add App' button.

Once you've added the new application, Userlane HEART will automatically start collecting data you can use to better understand how often your employees return to this app, whether they're actively engaged with it, as well as how much of it they navigate through.

Additionally, with Userlane Surveys, you can directly ask your employees for qualitative data about the application they use:

- What do you find most valuable in using [name of the application]?
- Why do you use [name of the application]?

- What benefits do you see in using [name of the application]?

3. Act on the data

After analyzing the HEART data and survey responses, you'll be able to make a decision on how to proceed:

- If the application in question goes against your internal IT policies, it's best to reach out to your IT team.
    - They can then decide if the application should be approved for internal use or blocked.
- If the application is a duplicate use case for an application already in your company's tech stack, you can continue to leverage Userlane to drive your employees to the correct application.

How Userlane can help:

We strongly recommend using a combination of Announcements and Tooltips to make employees aware of what to do.

With an Announcement you can inform the user and also give them a clear call-to-action, e.g.

- We moved to [name of the application] for improved functionality and better user experience. Follow the link and get started.
- Important Notice: We regret to inform you that the use of [name of the application] is no longer permitted due to [reason]. To ensure compliance with our policies and regulations, please discontinue use of the application immediately.

A Tooltip can be also used to ensure the information is shown during typical user actions, like on hover over the Login button:

- Sorry, [name of the application] is no longer available for use. Please use this link: [URL of new application]
- Switch to our new internal app for a smoother and more efficient workflow! Explore now: [URL of new application]
- Discover the superior features of [name of the new application]!

4. Monitor change

To ensure that the measures you took had an impact, continue to monitor HEART data for the application:

- you can check the Engagement metric to see if engaged sessions have decreased
- you can check the Adoption metric to see if the App Coverage has decreased
- you can check the Retention metic to see if fewer users are returning

Additionally, you can compare with the HEART data for the approved application, to ensure that traffic there is increasing.

Quick reference of commands in Userlane

Last Modified on 24.03.2025

About commands

Commands are useful for issuing specific instructions to cause a specific behaviour.

Various commands

Click on any header to get redirected to an article outlining the command in more depth.

Load the script

```
// load Userlane
(function(i,s,o,g,r,a,m){i['UserlaneCommandObject']=r;i[r]=i[r]||function(){(i[r].q=i[r].q||[]).push(arguments)};a=s.createElement(o),m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m)})(window,document,'script','https://cdn.userlane.com/userlane.js','Userlane');
```

Identify your user

```
//identify command
Userlane('identify', currentUser.id);
```

Identify the user and pass Custom Attributes

```
// identify command with custom user attributes
Userlane('identify', currentUser.id, {
  attribute_key: 'attribute_value'
});
```

Initialize Userlane

```
// initialize command
Userlane('init', your_property_ID);
```

Open the Userlane Assistant

```
// open the Userlane Assistant
Userlane('openAssistant');
```

Hide the Userlane Assistant

```
// hide Userlane
Userlane('hide');

// show Userlane again with initializing it
Userlane('init', your_property_ID);
```

Remove Userlane

```
// remove Userlane
Userlane('removeUserlane');
```

Language command

```
// set the language of Userlane
Userlane('lang', 'language_code');
```

Trigger command

```
// Start a userlane
// TODO: replace 12345 with your userlane id
Userlane('start', 12345);
```

```
// Start a userlane at a specific step
// TODO: replace 12345 with your userlane id
// TODO: replace 4 with the index of the step
Userlane('start', 12345, 4);
```

```
//Start a userlane only once per User
// TODO: replace 12345 with your userlane id
Userlane('startOnce', 12345);
```

Callback events

```
// hook into onStart, onComplete or onExit and provide a callback function
//TODO: Optionally replace onStart with onComplete or onExit and adjust the respective output message
Userlane('onStart', function(userlaneId, user) {

// you can put any code in here

console.log('the user started a guide');
});
```

```
// remove all callbacks from the onStart event
Userlane('onStart', false);
```

```
//Example user object you receive:
{
id: "9717166719265375",
generated: true,
time_signup: "2017-11-22T11:50:48.671Z"
}
```

Implement a command to open the Assistant

Last Modified on 10.04.2024

About opening the Assistant

Usually, a user opens the Assistant by clicking the Assistant icon (avatar) that is visible in one corner of the screen.

In some cases you might want to decide by whom and where Userlane content should be seen and want to show Userlane only when a user clicks on a specific element.

You might want to in general hide Userlane on specific pages (read here on how to set this up) and then want to

- open the Userlane Assistant when clicking on a specific button (e.g. a 'Help' or 'Interactive Support' button in your application)
- open the Userlane Assistant when activating a toggle

Why use it

By using this command, you can

- provide interactive guidance and support to users precisely when they need it,
- enhance the user experience and
- improve onboarding and navigation within the application.

Requirements

This option is only available

- if your application has the Userlane Snippet implemented
- your developers have added the openAssistant command to the specific button/toggle

Dev Task: Implement the openAssistant command

Add the following command to the element (e.g. 'Help' or 'Interactive Support' button).

When clicked, the Assistant is triggered in the same manner as clicking the avatar.

```
// open the Userlane Assistant
Userlane('openAssistant');
```

This command will immediately open the Assistant.

Hide Userlane on specific pages of your application

Last Modified on 12.01.2024

About hiding Userlane content

In some cases you might want to decide by whom and where Userlane content should be seen, e.g. based on roles and rights, sensitive pages.

This article covers

- the benefits

as well as the three options to hide Userlane content on specific pages:

- option A: use segmentation
- option B: implement a hide command
- option C: passive mode

Why use it

You might want to

- Hide the Userlane Assistant on dedicated pages (e.g. Login Pages)
- Hide Assistant (Guides) on a specific user request or for dedicated users

Option A - Manager task: Use Segmentation

Page Segment

You can hide the whole Userlane Assistant on a specific page using context-based segmentation.

This only works if the respective page has a specific URL content that is not part of the domain and that is only visible in the URL when being in this section (e.g. /login).

Learn more info on context-based segmentation in this article.

User Segment

You can hide the whole Userlane Assistant for specific user groups only you can use user-based segmentation.

Option B - Dev Task: Implement the hide command

Alternatively, you can hide Userlane programmatically on specific pages (e.g. the login page) using the hide command:

```
// hide Userlane
Userlane('hide');
```

If you want to show Userlane again after hiding it, you can use the initialize command:

```
// initialize Command
Userlane('init', your_property_ID);
```

Good to know

- If you want to open the Assistant with a specific button, you can use the openAssistant command.
- If you use links to share Guides, the hide command won't work on the login page. The Guide will start on the login page if the login URL is added on the Application URLs page of your application's settings. If you want this case to work as well, your developers have to remove the Userlane snippet from the login page.

Option C - Userlane Task: Use the passive mode

Should you decide to have your own button which should trigger Userlane, please don't use the hide command. Simply contact us, so we can advise you on how to best set it up.

Userlane Language Detection

Last Modified on 05.08.2025

About Userlane Language Detection

Userlane automatically detects the language of your application and of the user's browser to match a user's language preferences.

Language Detection Priorities

Userlane detects languages based on a priority list. You can find that below:

Priority 1: Language is taken from the settings of the application (lang Command)
Priority 2: Language is taken based on your language settings in the Userlane Portal
Priority 3: Based on the HTML tag
Priority 4: Based on Meta information
Priority 5: Based on the browser language
Priority 6: The language falls back to the default language defined in the Userlane Portal

> ℹ In case the application has the language tag hard-coded in the app's HTML, please contact your Customer Value Manager. As in those cases, we can adjust the language detection from our side, which will prioritize the end user's browser language over the application's language.

Defining a specific Language

If you want to make sure that Userlane always uses the same language as your application, you can explicitly define the language that Userlane should use with the language command.

This is especially useful if your application offers a language setting and does not define its language in the standard html lang-Attribute:

```
// set the language of userlane
Userlane('lang', 'language_code');
```

Your language_code might be a 2 letters code (like 'en' or 'de') or a 5 letters code (like 'en-us' or 'en-gb').

Best Practices

Set up the correct Language Codes

The language code used in the command should exactly match the language key that was used when the language was created in the Portal.

Ensure the Language is published

Keep in mind, that the language you pass via the language command must exist and be public in the Userlane

Portal. Otherwise, Userlane will take the defined default language instead.

Check which language is shown when opening the Editor

Userlane opens the Editor in the last language you worked in. This helps you continue editing seamlessly without needing to reselect a language. Keep this in mind when switching between languages to avoid unintentional edits in the wrong language and to understand why the Assistant is displayed to you in a specific language.

Start a Guide with a JavaScript command

Last Modified on 20.04.2026

Why use it

Start a Guide with a custom trigger natively in your application if you want to customize the user experience.

You can use the trigger command to start a Guide, e.g. within a specific button.

> ℹ Please note that commands play the Guide and do not take any Segmentation settings into consideration.

Start a Guide

```
// TODO: replace 12345 with your Guide ID
Userlane('start', '12345');
```

Start a Guide only once per User

```
// TODO: replace 12345 with your Guide ID
Userlane('startOnce', '12345');
```

You can look up the Guide ID in the Userlane Portal and insert it in one of the commands listed below.

Calling this command will also fire the onStart event.

Remember that this will only work if you are passing a specific User ID via the Snippet. If that User ID is changing, the Guide will appear again.

Should the User leave the Guide in the middle, the Guide will reappear until the Guide was completed.

Start a Guide at a specific step

Important: The index of the step starts at 0. It is different from the step number that you see in the Editor or Portal. The step number in the Editor or Portal starts at 1.

Example: If you want to start the Guide at step 11, you have to insert the index 10.

```
// TODO: replace 12345 with your Guide ID
// TODO: replace 4 with the index of the step
Userlane('start', '12345', 4);
```

Good to know

When you're signed in to the Userlane Portal, the start command will work even when you've set the Guide to *private*. You can use this to test if the trigger works. Your end users won't see the Guide when it's set to *private*.

Hooking into event callbacks

Last Modified on 12.01.2024

Why use it

The Userlane Javascript API provides some events that you can hook into. This allows you to get notified when a user does something within Userlane.

Hooking into these events empowers you to

- extend and enhance the functionality of Userlane,
- integrate it with your existing ecosystem,
- trigger other reactions to the activity of your users in Userlane,
- forward those events to your analytics solution to correlate them with all the other data you have there
- create a more tailored and interactive user experience.

There are three events that you can listen to:

- **onStart:** fired after a user started a Guide
- **onComplete:** fired after a user successfully completed a Guide at its last step
- **onExit:** fired after a user canceled a Guide or the Guide was canceled because of an error

Hooking into events

All events work with the same structure:

```
// hook into onStart and provide a callback function
Userlane('onStart', function(userlaneId, user) {

// you can put any code in here

console.log('the user started a guide');
});
```

Use the event name as the first argument and provide a callback function in the second argument. This callback function will be called with two arguments:

1. *userlaneId* is a unique identifier for the Guide that triggered the event.
2. user is the object with all the data about the user we have at this point. You can assume that it always has an ID attribute.

onStart - after a user started a Guide

This event is fired whenever a Guide is started, even if it is started from the API's start command.

```
// hook into onStart and provide a callback function
Userlane('onStart', function(userlaneId, user) {

// you can put any code in here

console.log('the user started a guide');
});
```

onComplete - after a user successfully completed a Guide at its last step

This event is fired whenever a user reached the end of a Guide. This indicated that it was completed successfully. From now on, the Guide will be marked with a green checkmark in the Userlane Assistant for this user.

```
// hook into onComplete and provide a callback function
Userlane('onComplete', function(userlaneId, user) {
  // you can put any code in here
  console.log('the user completed a guide');
});
```

onExit - a user canceled a Guide

This event is fired whenever a user cancels a Guide using the Close button in the guide step. It is also fired when a Guide cancels itself after an error or when an important step is not found.

```
// hook into onExit and provide a callback function
Userlane('onExit', function(userlaneId, user, stepIndex) {
  // you can put any code in here
  console.log('the user canceled a guide');
});
```

Overwriting callbacks

We only keep one callback for each event. If you hook up to an event again, it will overwrite your previous hook.

Removing callbacks

If you want to unbind a callback from these events, call the event name again with false, null, or undefined instead of a callback function.

```
// remove all callbacks from the onStart event
Userlane('onStart', false);
```

The user object

The second argument passed to your callback function is the user object. It contains all the data we have about the user at the time of the event. It is guaranteed that the user at least has an ID.

In addition to the ID, we provide the flag generated that indicates whether the ID was randomly generated by Userlane or whether it was provided to our API or snippet.

An example for the user object is

```
{
  id: "9717166719265375",
  generated: true,
  time_signup: "2017-11-22T11:50:48.671Z"
}
```

Your Userlane API token

Last Modified on 08.06.2026

Your Userlane API token is a single credential that lets you move data between Userlane and your own systems programmatically, without doing it by hand in the Portal. One token covers everything the API can do, both reading data out of Userlane and pushing data in.

This article explains what the token is for at a high level. Each linked article below covers one task in detail.

What you can do with it

The API token gives you access to two kinds of operation.

Export data out of Userlane. Pull your Userlane data into your own tools (a BI dashboard, a data warehouse, or an internal report). You can export:

- Guide, Guide progress, and Announcement events: how users interact with your in-app content.
- HEART, NPS, Survey, and Tags data: analytics and feedback.
- User profile data: details and attributes on your end-users.

Push data into Userlane. Send data from your own systems into Userlane so your content can use it. Today this covers:

- User attributes: push attributes (such as role, region, or licence type) from any system, so you can segment and target your Userlane content on data Userlane doesn't collect itself.

Generating your token

Generate your token in the Userlane Portal under **Settings > API Token**.

 The token is generated for each Userlane Manager individually. You can generate a new one at any time using the same button in your Portal. Generating a new token replaces the old one, so any integration using the previous token will need to be updated.

Who this is for

Working with the API requires technical knowledge, so the assistance of a developer is recommended. As an admin, you generate and manage the token; your developer uses it to build the integration.

A note on access

Some operations require the token's Manager to have admin rights — pushing user attributes, for example, requires a company admin. If an integration returns a permission error, check that the token belongs to a Manager with the right level of access.

Detailed guides

- Export Guides, Guide progress and Announcement data via API
- Export HEART, NPS, Surveys, and Tags data via API

- User profile data export
- Push user attributes via API

Export Guides, Guide progress and Announcement data via API

Last Modified on 12.05.2026

About the User Event Export

About the Enduser Events APIs

The Enduser Events APIs let you export engagement data from your Userlane property in JSON format. Use them to bring guide and announcement engagement data into your BI tool (Power BI, Tableau, Looker, etc.) or combine it with data you collect in other systems.

Why use it

Use the data to:

- track how individual users engage with your Guides and Announcements
- measure onboarding completion across your user base
- enrich your internal reporting with Userlane engagement data
- share Userlane insights with a wider audience of stakeholders in your organisation

What you can export

There are three APIs in the Enduser Events family. Choose based on the question you want to answer:

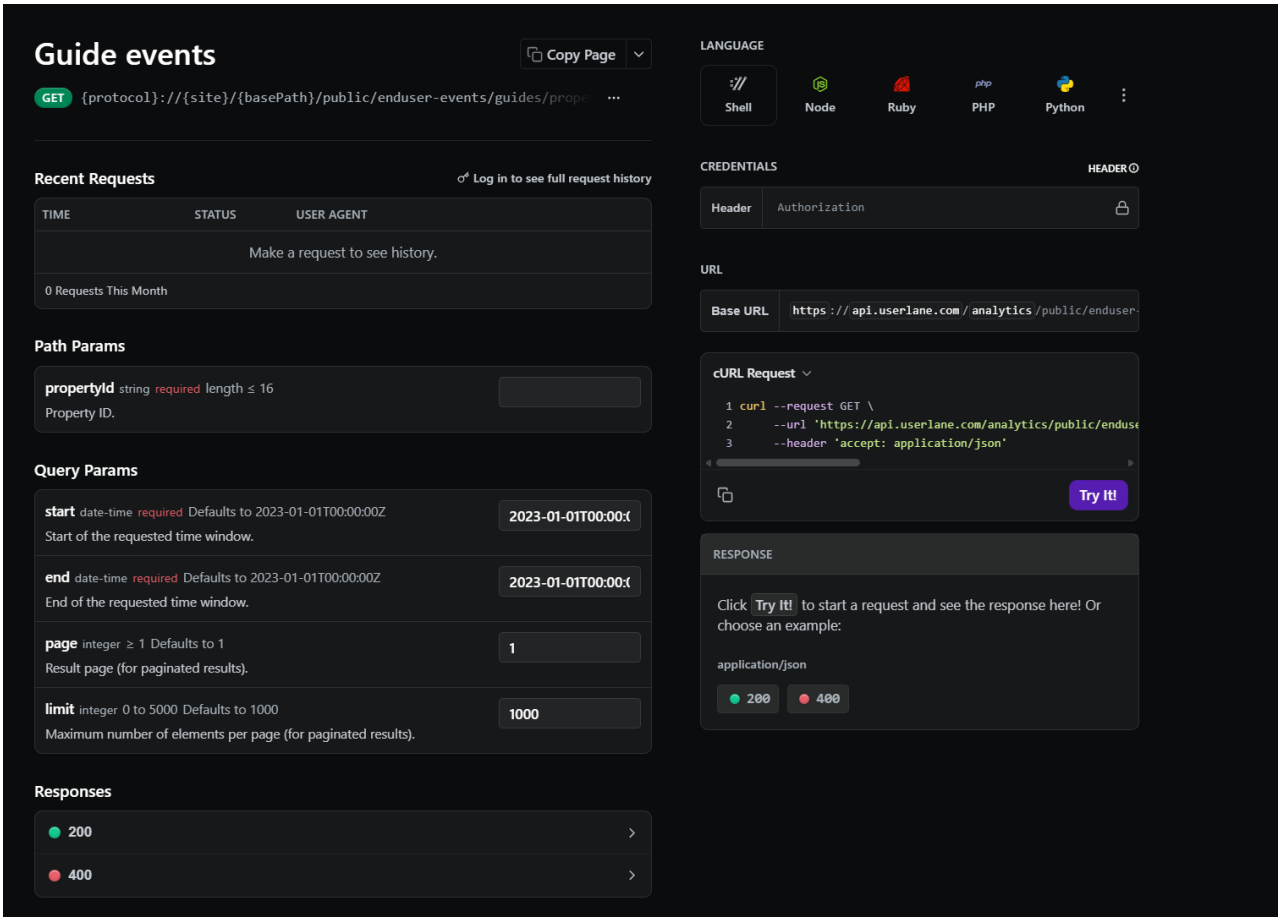
What percentage of my onboarding Guide is done by users?	Guide Progress API
Where do users drop off in a Guide? What was the most started Guide?	Guides API
How many users saw or clicked my Announcement?	Announcements API

Guides API

Returns event-level records for every interaction with your Userlane Guides:

- **Guide started** — a user opened a guide
- **Guide finished** — a user reached the end of a guide
- **Guide exited** — a user closed a guide before finishing (includes the step they exited on)

For each event, you get the time, event type, user, guide ID, and (for exits) the step number and total step count.

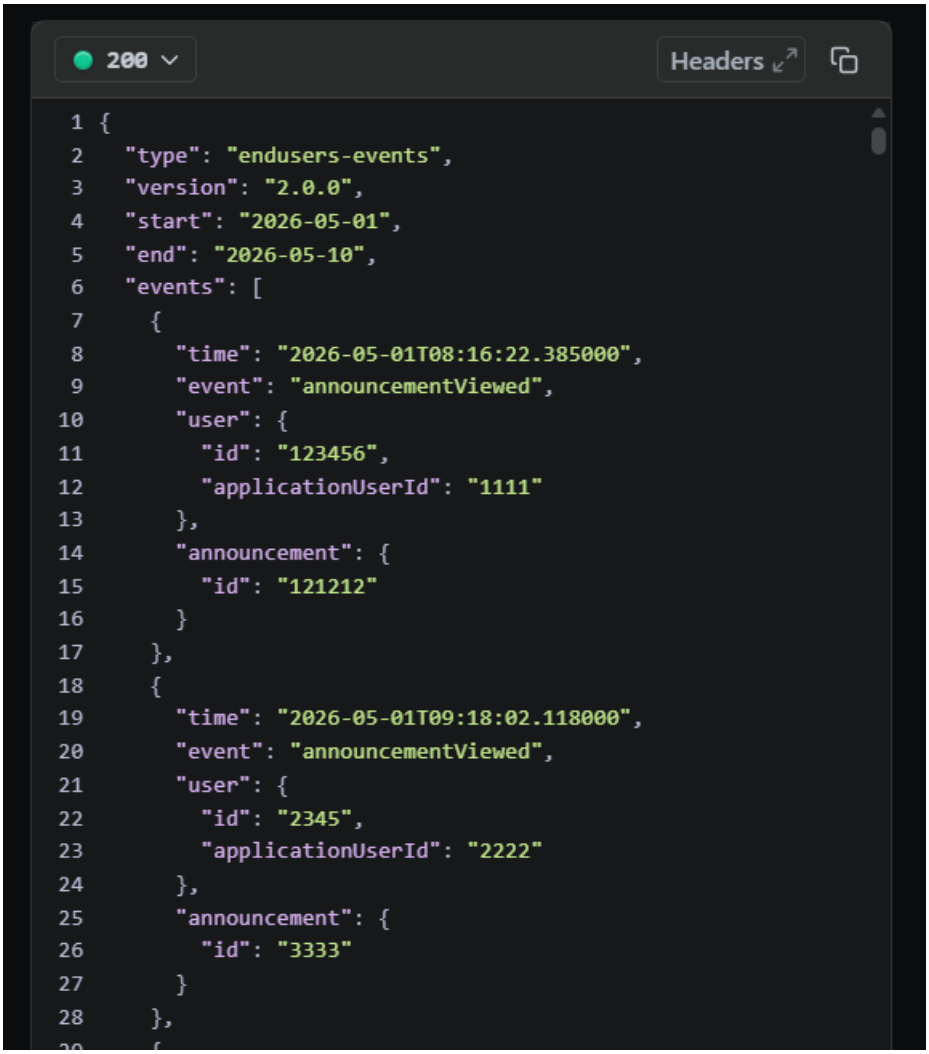


Announcements API

Returns event-level records for every interaction with your Userlane Announcements:

- **Announcement viewed** — an announcement was shown to a user
- **Announcement interacted** — a user clicked a button or link inside an announcement

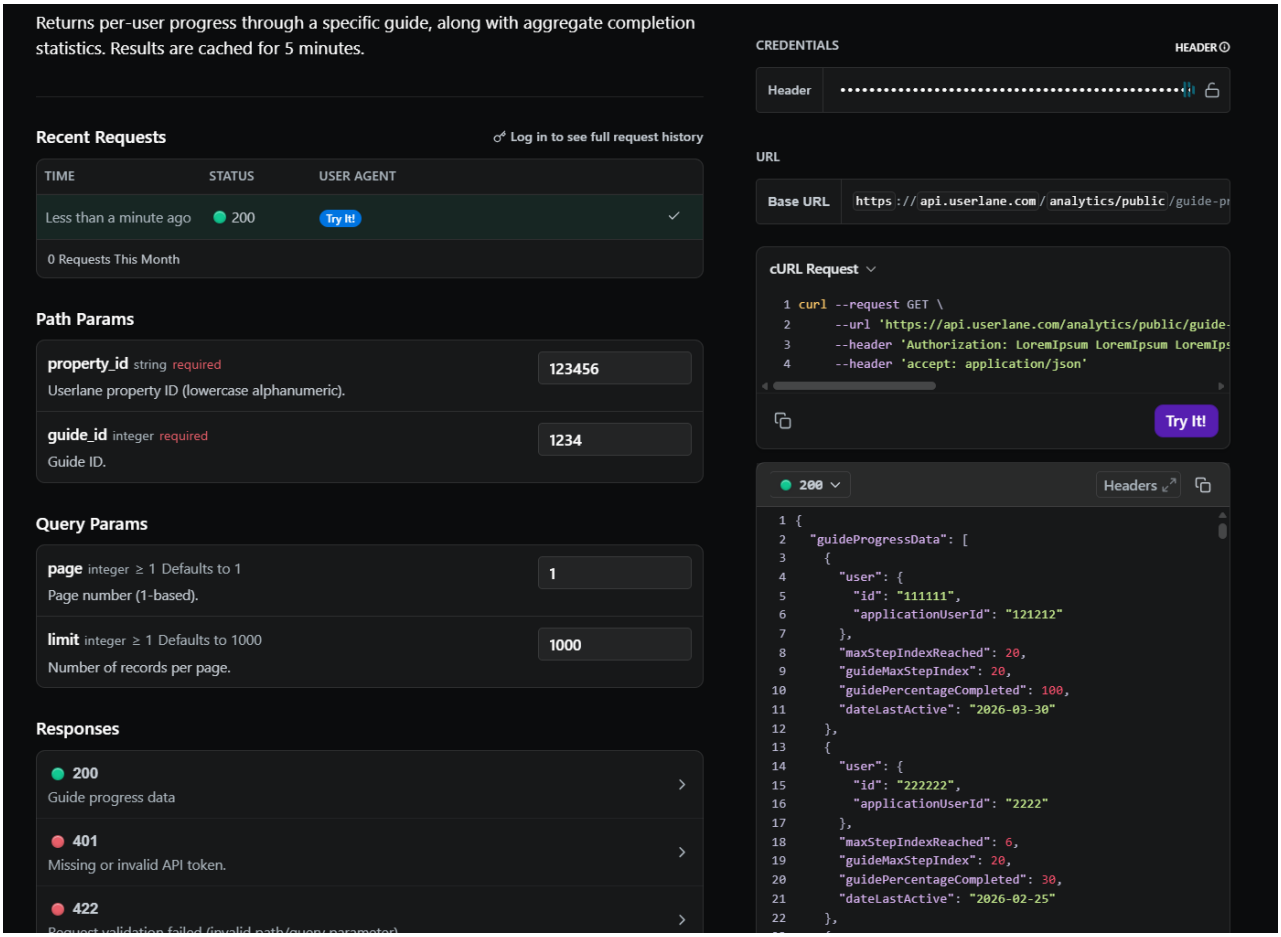
For each event, you get the time, event type, user, and announcement ID.



Guide Progress API

Returns the current completion state for a specific guide, per user — how far each user got, what percentage they completed, and when they last interacted with it. Also returns aggregate completion statistics across all users (e.g. how many users reached 20%, 40%, 60%, 80%, or 100% completion).

The results from all three APIs are exported in JSON format.



Resolving IDs to names

The APIs return Guide and Announcement IDs as numbers (for example, `"id": "99067"`). To make the exported data usable in a report or dashboard, you'll need to match these numeric IDs to their human-readable titles.

For Guides:

- Open the **Guide Analytics** page in the Userlane Portal and export the list to CSV. The export includes both Guide ID and title.
- Or, open the analytics page for a specific guide — the ID is visible in the URL.

For Announcements:

- Open the **Announcement Analytics** page in the Userlane Portal and export the list to CSV. The export includes both Announcement ID and title.

For Guide Progress:

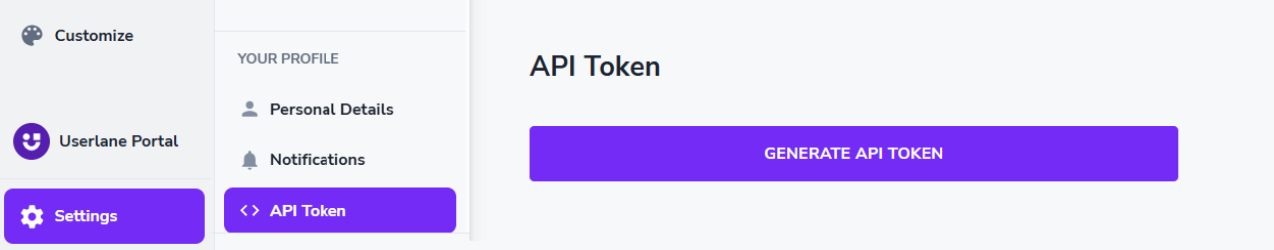
- You need the Guide ID before making the request (it's a required parameter). Find it the same way as above.

Join the API export with the CSV lookup in your BI tool to display names instead of numeric IDs in your reports.

How to export the data

Generate your token

The API export is protected and requires authentication via an Authorization Token. You can generate your token in the Userlane Portal under **Settings > API Token**.



The token is generated for each Userlane Manager individually. You can regenerate it at any time using the same button in your Portal.

Run the request

The export is available through our developer documentation, which includes a "Try it" button you can use to test a request directly in the browser.

- Guides API
- Announcements API
- Guide Progress API

Each request needs:

- **Property ID** — the individual Userlane ID of your application
- **Start and End dates** — the time span for the export, in the format `2026-04-01T00:00:00+00:00`
- **Page and Limit** — up to 1,000 records per page. For larger results, request each page separately by changing the page number.
- **Authentication token** — paste your token into the Authentication field
- **Guide ID** (Guide Progress only) — the ID of the guide you want progress data for

The API exports cover a maximum of 60 days of history per request. For longer history, schedule a daily or weekly pull into your own database.

Once the request runs successfully, you can copy the JSON response (or the request code) using the copy icon.

Troubleshooting

If the request fails, you'll see an error message in the result section. Most errors relate to:

- an incorrect date format or date format is outside of the allowed date range (for example, larger than 60 days)
- an invalid or expired authentication token

Review your parameters against this article. If the issue persists, please reach out to us.

Export HEART, NPS, Surveys, and Tags data via API

Last Modified on 19.06.2026

About the Analytics APIs

The Analytics APIs let you export HEART scores, NPS responses, Survey responses, feature interaction data, and Task adoption data from your Userlane property in JSON format.

Why use it

Use the data to:

- track product experience health over time with HEART scores
- pull NPS and Survey responses into your reporting alongside other feedback channels
- measure feature adoption with Tags data
- combine Userlane analytics with your own user data (role, region, department) for segment-level insights
- measure task completion and drop-off with the Tasks API

What you can export

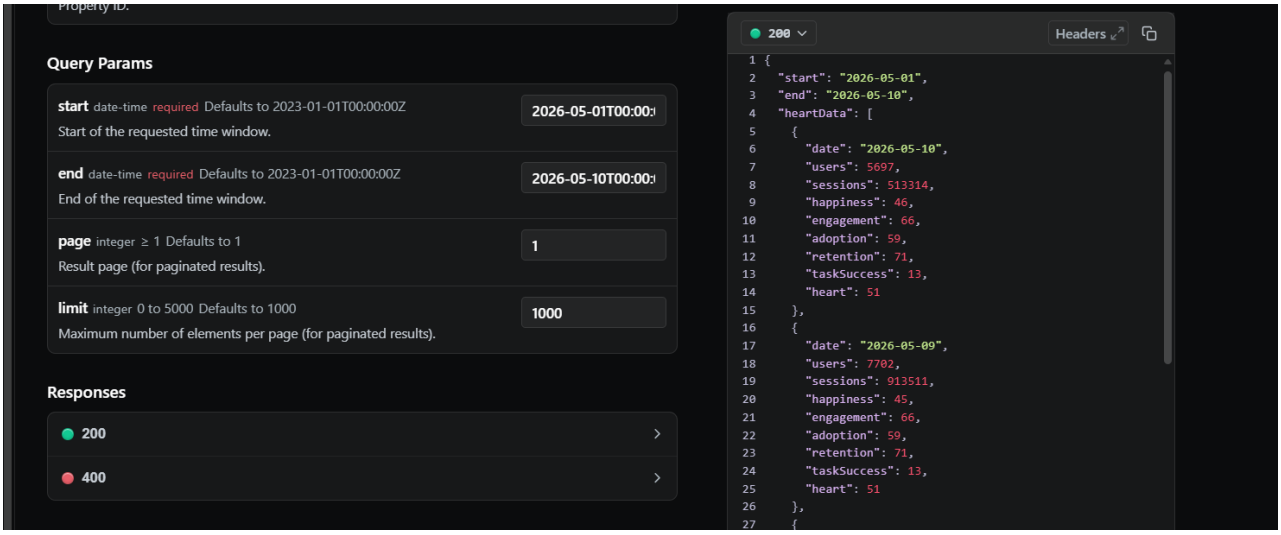
There are five Analytics APIs. Choose based on the question you want to answer:

What are my HEART scores?	HEART API
Who are my promoters and detractors?	NPS API
How satisfied are users with a specific feature or flow?	Surveys API
Which features are users actually clicking?	Tags API
Are users completing key Tasks, and where are they dropping off? Which steps within a Task do users complete or abandon?	Tasks API

HEART API

Returns daily HEART scores for your application — the overall composite score plus the five individual letter scores (Happiness, Engagement, Adoption, Retention, Task Success), along with user and session counts.

Use it to track product experience health over time and identify which dimension (H, E, A, R, or T) is driving changes in the overall score.



NPS API

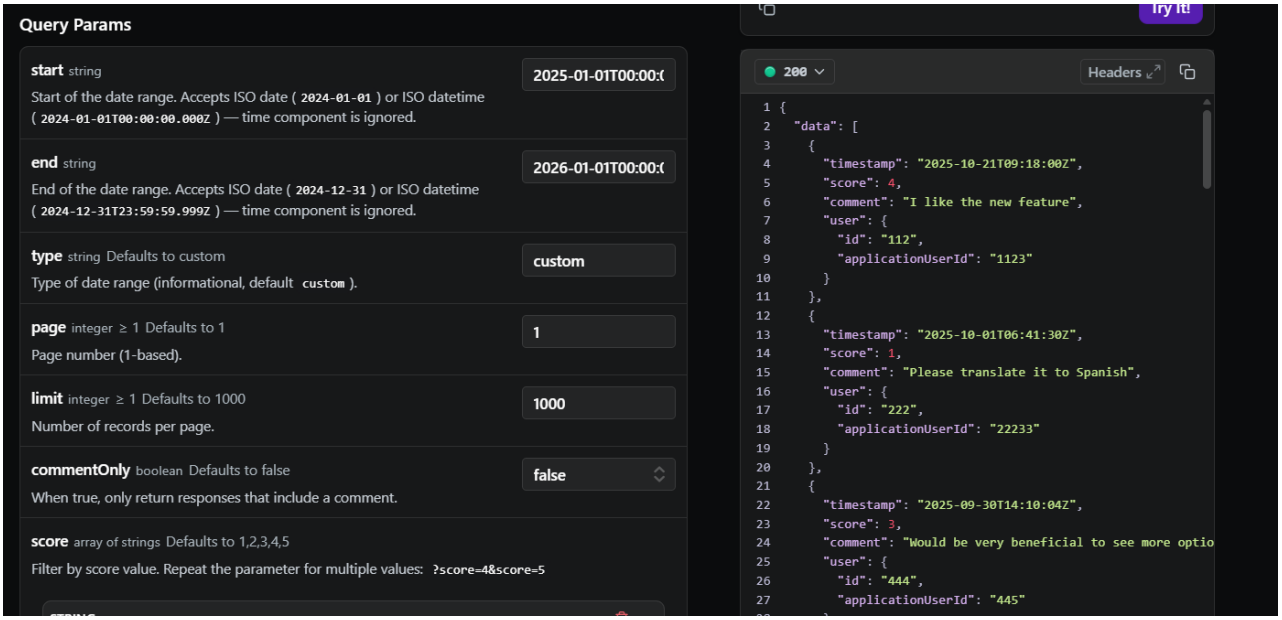
Returns individual responses to Net Promoter Score surveys — score (0–10), optional free-text comment, timestamp, and user ID. NPS responses are bucketed into Promoters (9–10), Passives (7–8), and Detractors (0–6).

Use it to track sentiment trends, identify champions and at-risk users, and mine free-text comments for themes.



Surveys API

Returns individual responses to custom in-app surveys — score (1–5), optional free-text comment, timestamp, and user ID. Unlike NPS, which asks one fixed question across your product, surveys can be scoped to specific moments or features.



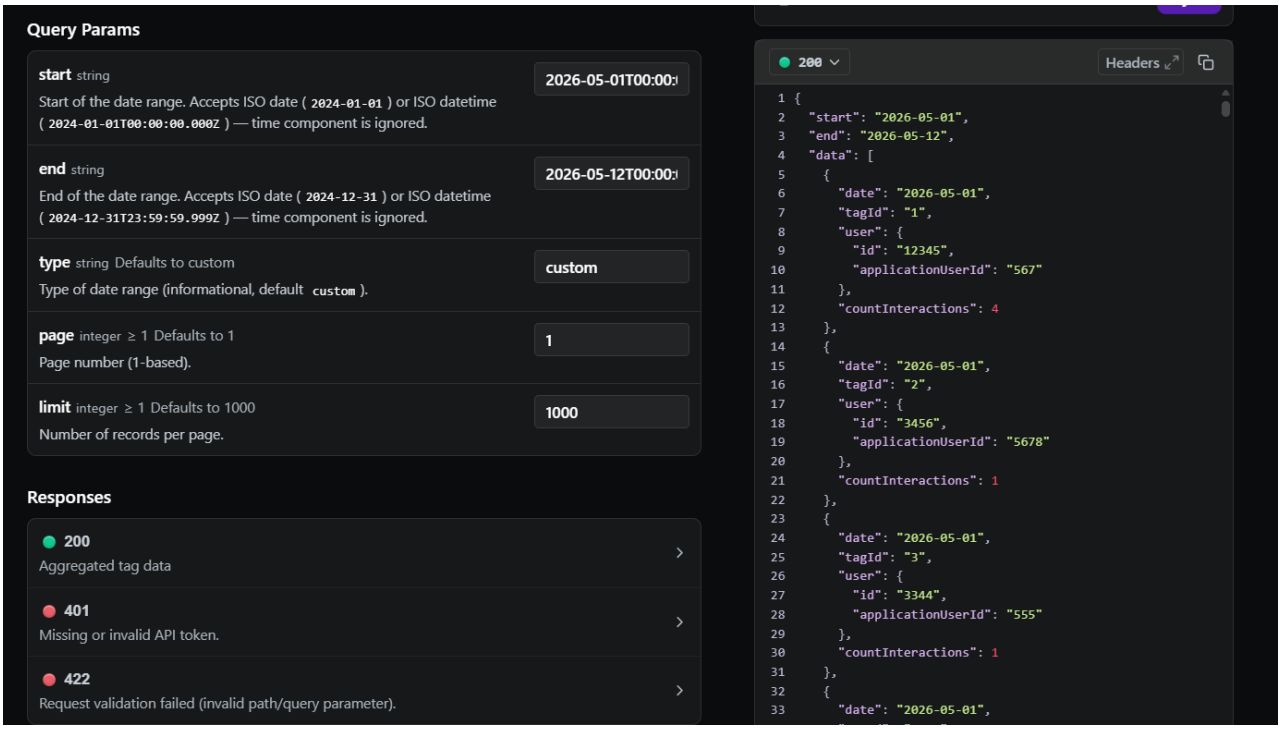
To get the Survey results you will need to enter the Survey id that you can find in the Portal.

Tags API

Returns per-user, per tag, per-day interaction counts on tagged elements — buttons, links, or pages you've marked in the Userlane Portal as meaningful actions in your product.

Use it to measure feature adoption, identify power users, spot adoption gaps by segment, and track how usage of a specific feature changes over time.

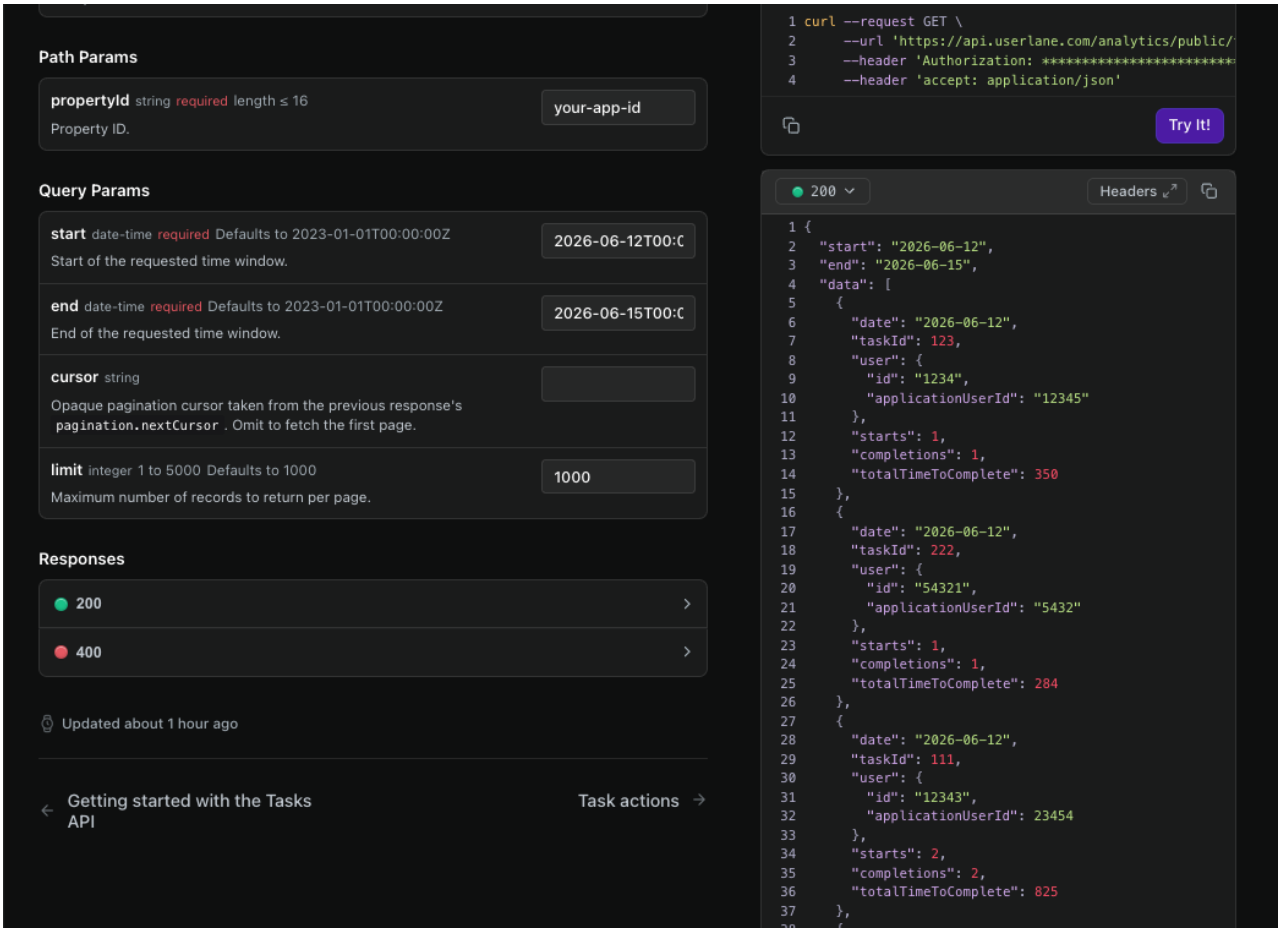
The results from all APIs are exported in JSON format.



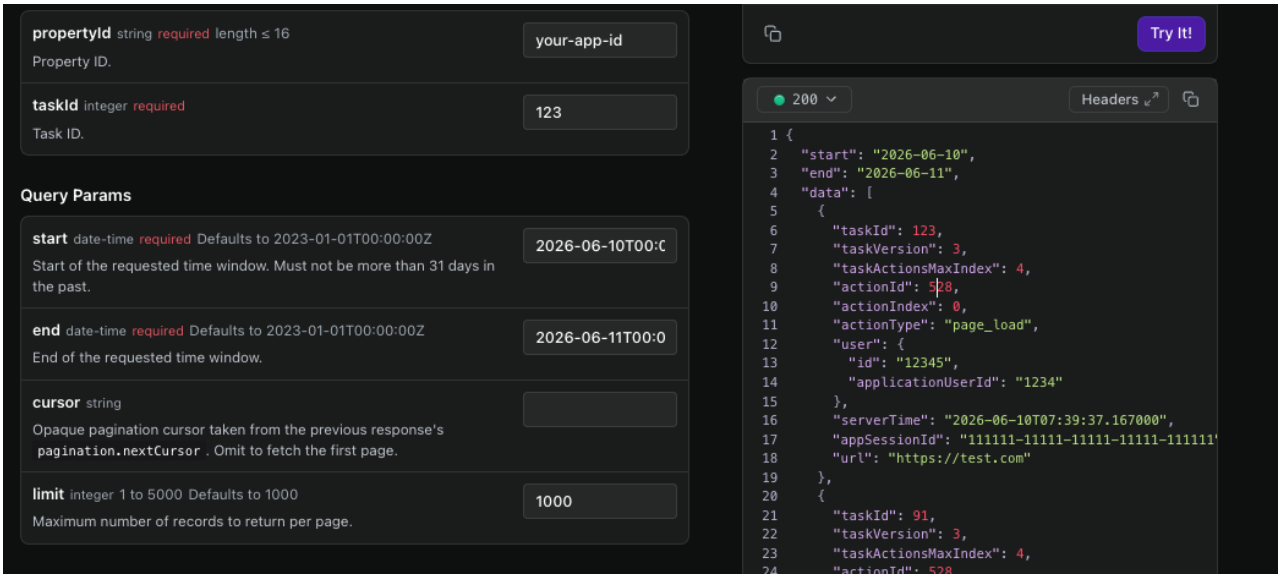
Tasks API

Returns task adoption data through two endpoints. The aggregated endpoint gives per-user, per-day starts, completions, and time to complete across all tasks in a property. The actions endpoint gives the raw, step-by-step event stream for a single task.

Use the aggregated endpoint to track completion rates and spot tasks with high drop-off.



Use the actions endpoint to see exactly which step within a task users abandon.

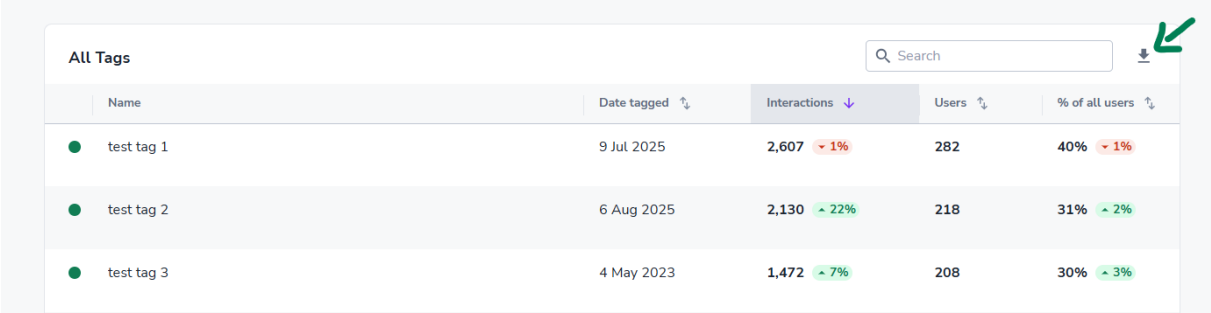


Resolving IDs to names

Tags, Surveys, NPS and Task responses return numeric IDs in the API response, not names. To make the exported data usable in a report or dashboard, you'll need to match these IDs to their human-readable titles.

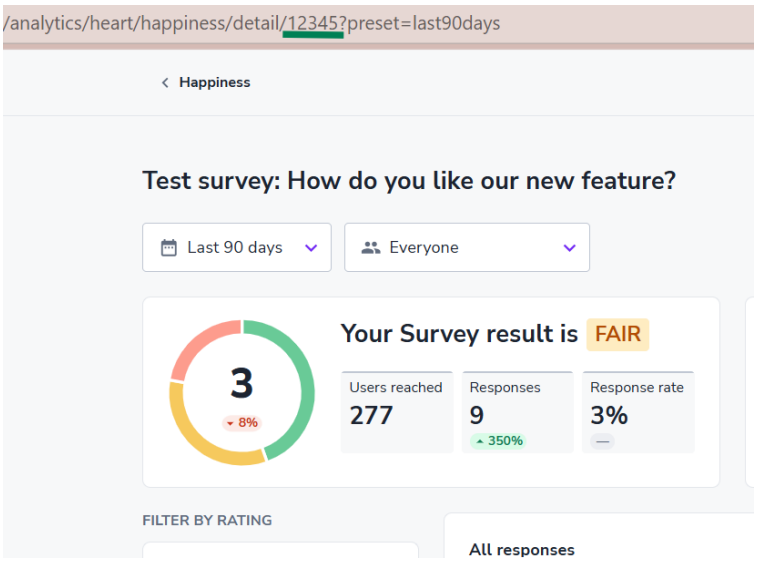
For Tags:

- Open the **Tag Analytics** page (/analytics/heart/task-success?section=tags) in the Userlane Portal and export the list to CSV. The export includes both Tag ID and name.



For Surveys and NPS:

- There can only be one NPS so you don't need to resolve the ID
- The Survey ID is required parameters in the API request. You can find them in the URL of the corresponding survey in the Userlane Portal.



Join the API export with the CSV lookup in your BI tool to display names instead of numeric IDs in your reports.

For Tasks:

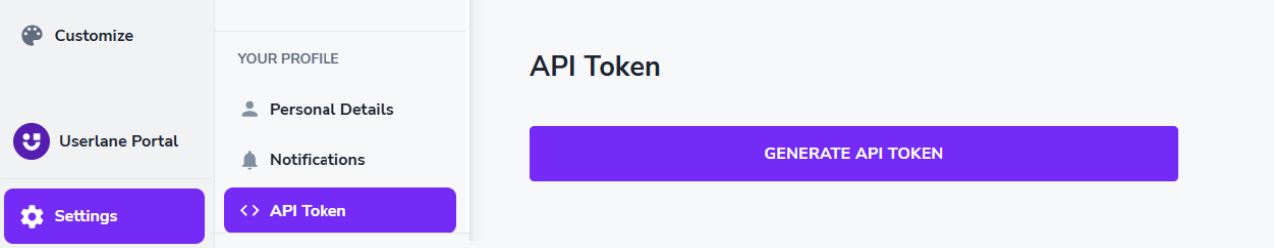
The aggregated endpoint returns a numeric `taskId`. Export the task list from the Userlane Portal to get the task ID and name.

The actions endpoint also returns a numeric `actionId`. Open the specific task's page in the Portal and export its Action chart, which lists each action's ID and name (for example, Open page, Enter input element, Click SAVE). Join on `actionId` to show readable step names.

How to export the data

Generate your token

The API export is protected and requires authentication via an Authorization Token. You can generate your token in the Userlane Portal under **Settings > API Token**.



The token is generated for each Userlane Manager individually. You can regenerate it at any time using the same button in your Portal.

Run the request

Each API is available through our developer documentation, which includes a "Try it" button you can use to test a request directly in the browser:

- HEART API
- NPS API
- Surveys API
- Tags API
- Tasks API

Each request needs:

- **Property ID** — the individual Userlane ID of your application
- **Survey ID** (Surveys only) — the ID of the specific survey
- Start and End dates — the time span for the export.
  - HEART, NPS, Surveys, and Tags use the format `2026-04-01T00:00:00+00:00`.
  - For the Tasks API, `start` and `end` are treated as inclusive UTC calendar dates: the time-of-day is ignored, so the whole of the end day is always included. The Tasks actions endpoint additionally requires `start` to be within the last 31 days.
    - Unlike HEART, which is smoothed over a rolling 90-day window, the Tasks API returns the actual events in the window you request, with no smoothing.
- Pagination — pagination works one of two ways depending on the API.
  - HEART, NPS, Surveys, and Tags use page-based pagination: up to 1,000 records per page, request each page by changing the page number.
  - The Tasks API uses **cursor-based pagination** instead: leave the cursor empty on the first request, then pass the `nextCursor` value from each response back as the `cursor` parameter until it returns null. There is no page number for Tasks.
- **Authentication token** — paste your token into the Authentication field

Once the request runs successfully, you can copy the JSON response (or the request code) using the copy icon.

Troubleshooting

If the request fails, you'll see an error message in the result section. Most errors relate to:

- an incorrect date format
- an invalid or expired authentication token

Review your parameters against this article. If the issue persists, please reach out to us.

Implement the removeUserlane command

Last Modified on 24.03.2025

About the removeUserlane command

The removeUserlane command withdraws the initialized Userlane property present in the application. When triggered, the Userlane Assistant and associated content will disappear and HEART analytics will no longer be active for that user.

You can use this command to specify when and where Userlane is available. For example, if a user who previously accepted all cookies adjusts their preferences to no longer accept Userlane cookies, the removeUserlane command be utilized to no longer inject the Userlane product for that user.

Requirements

This option is only available

- if your application has the Userlane Snippet implemented
- your developers have added the removeUserlane command to the specific button or action in your application

Dev Task: Implement the removeUserlane command

Below you will find the command to be implemented:

```
// remove Userlane
Userlane('removeUserlane');
```

User profile data export

Last Modified on 22.04.2026

About User Profile Data Export

This feature allows you to export data containing details on your Userlane end-users.

This article covers

- the requirements
- the benefits
- what data is exported
- how to export the data
- troubleshooting

Requirements

It requires technical knowledge so the assistance of a developer is recommended.

Why use it

Use the data to:

- check if the correct details are saved for your users
- compare it against the statistics you are collecting internally with other tools
- check when your Users got activated for Userlane or when was the last time they were seen

Overview of exported data

The exported data will contain details on your end-users:

userlaneId	A unique id generated by Userlane
Id	A unique id generated and provided by Customer
timeCreated	The time when user was ucreated in Userlane
firstSeenAt	The time and date the User was first detected by Userlane per [app name]

lastSeenAt	The time and date the User was last time detected by Userlane per [app name]
applicationAttributes	Custom attributes a user has for the app, with their values. If no value is set, it shows `null`
companyAttributes	General custom attributes a user has not for a specific app, with their values. If no value is set, it shows `null`

The results are exported to a JSON format which you can process for your needs with the help of a developer.

Here is a sample result in JSON format:

```
{
 "pagination": {
  "page": 1,
  "limit": 10,
  "totalElements": 1,
  "totalPages": 1
 },
 "users": [
  {
   "id": "<user-provided-id>",
   "userlaneId": "<userlane-db-id>",
   "timeCreated": "2025-03-03 16:40:35",
   "firstSeenAt": "2025-03-03 16:40:35",
   "lastSeenAt": "2025-03-03 16:40:35",
   "applicationAttributes": {
    "key": "value"
   },
   "companyAttributes": {
    "key": "value"
   }
  }
 ]
}
```

Export the data

Prerequisites

This type of data export is protected and requires authentication by an Authorization Token. After this feature is enabled on your account, you can generate your Authorization Token on the Userlane Portal under Settings > API Token.

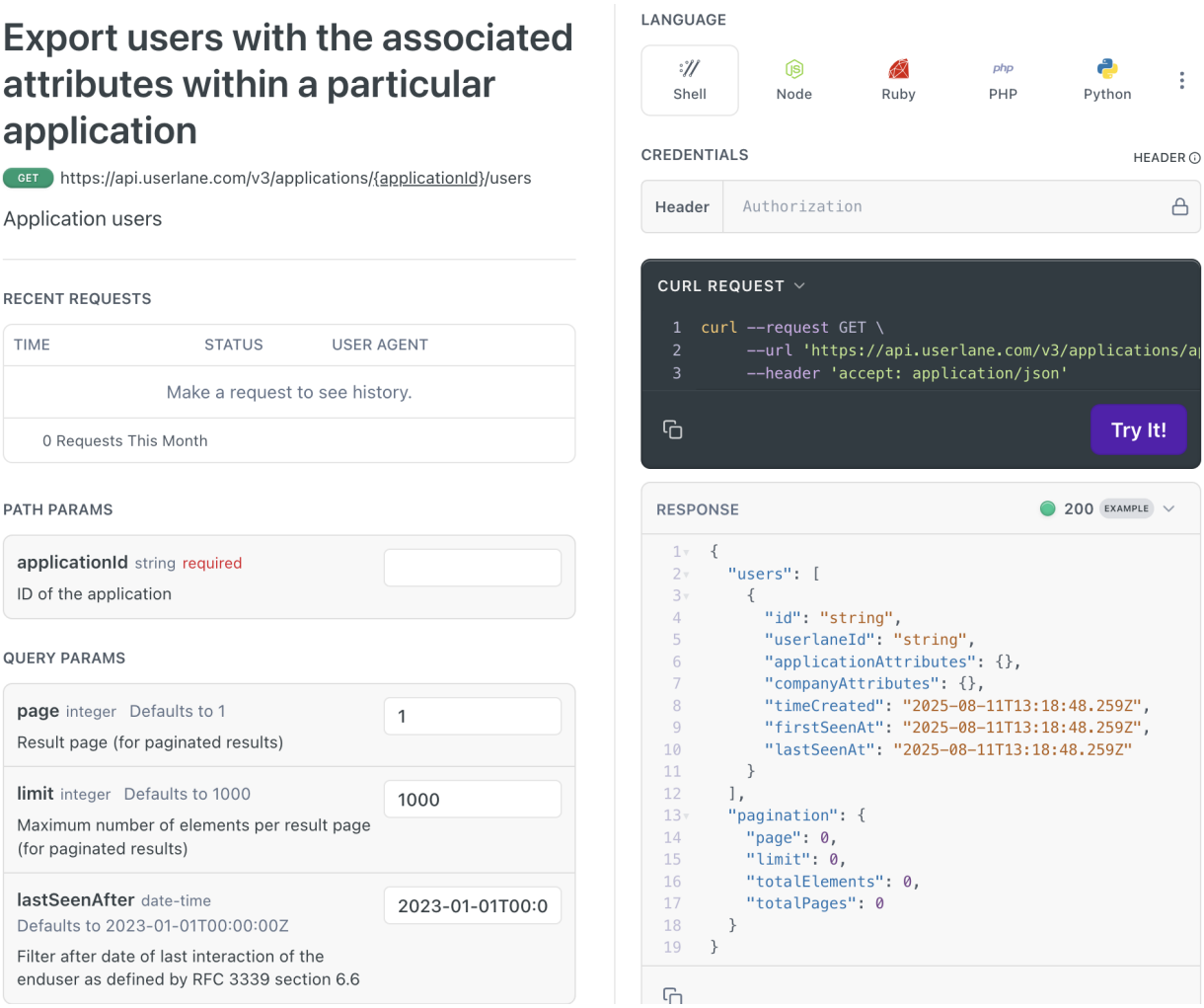
 The token is generated for each Userlane Manager individually. You can generate a new token at any time using the same button in your Portal.

The export can only be done with a special tool. We have made it available for you here

Preparing a request

For the request to be successful, fill out the tool with the required data in the required format.

This is the general view of the export page. We will go through all the required fields below:

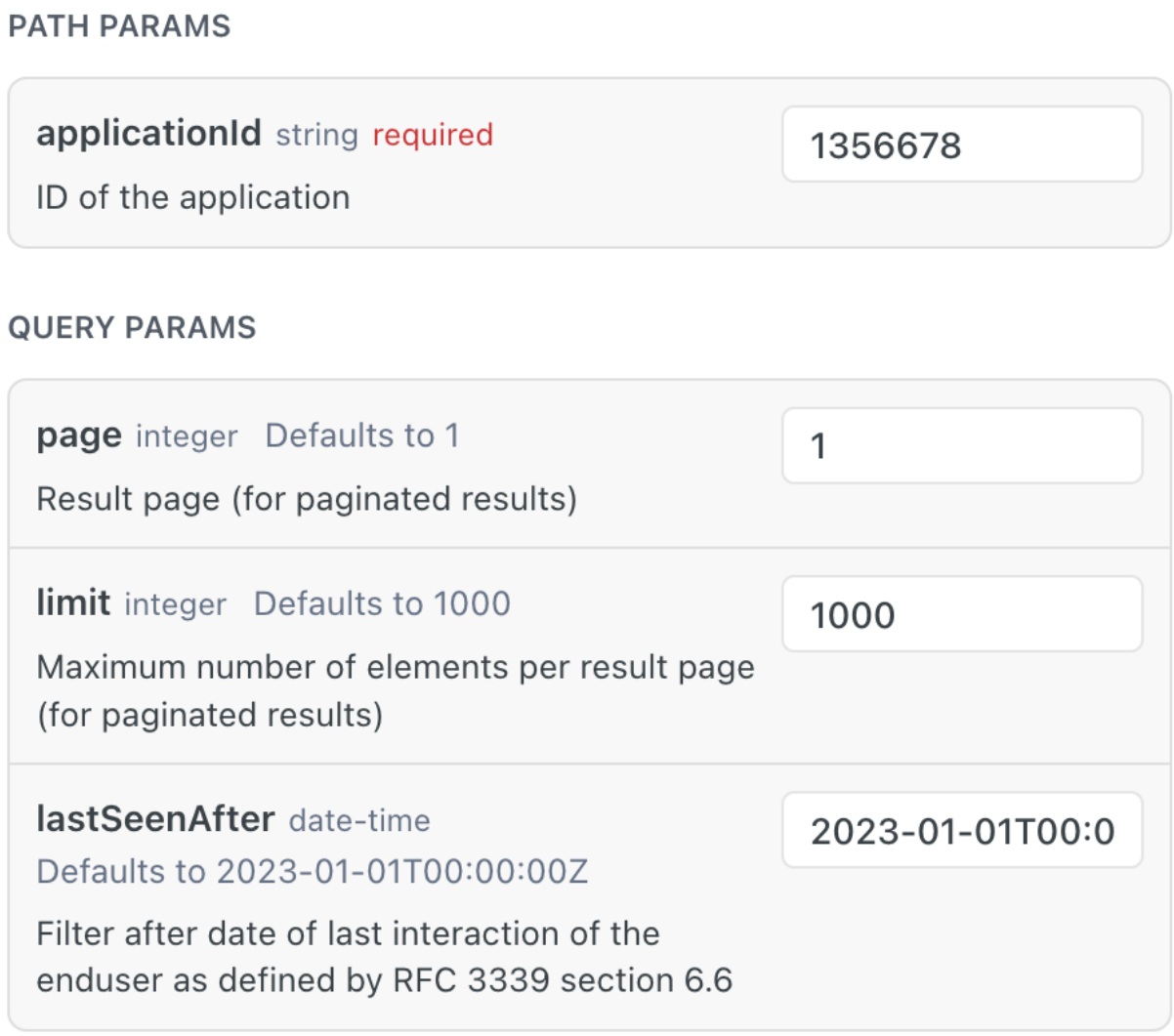


Parameters

In order to target the data for your application and for a specific time span, enter search parameters:

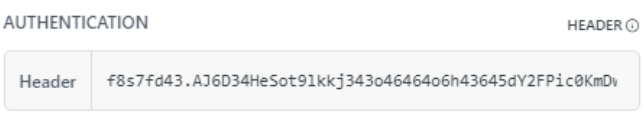
- Application ID: the individual Userlane ID of your application
- lastSeenAfter: will include only users active after a specific time
- Page and Limit options: the maximum elements per page is 1000, if your result is bigger, you will need to request the data for each page separately by changing the page number and running the query again

Here is an example of properly filled out parameters:



Authentication

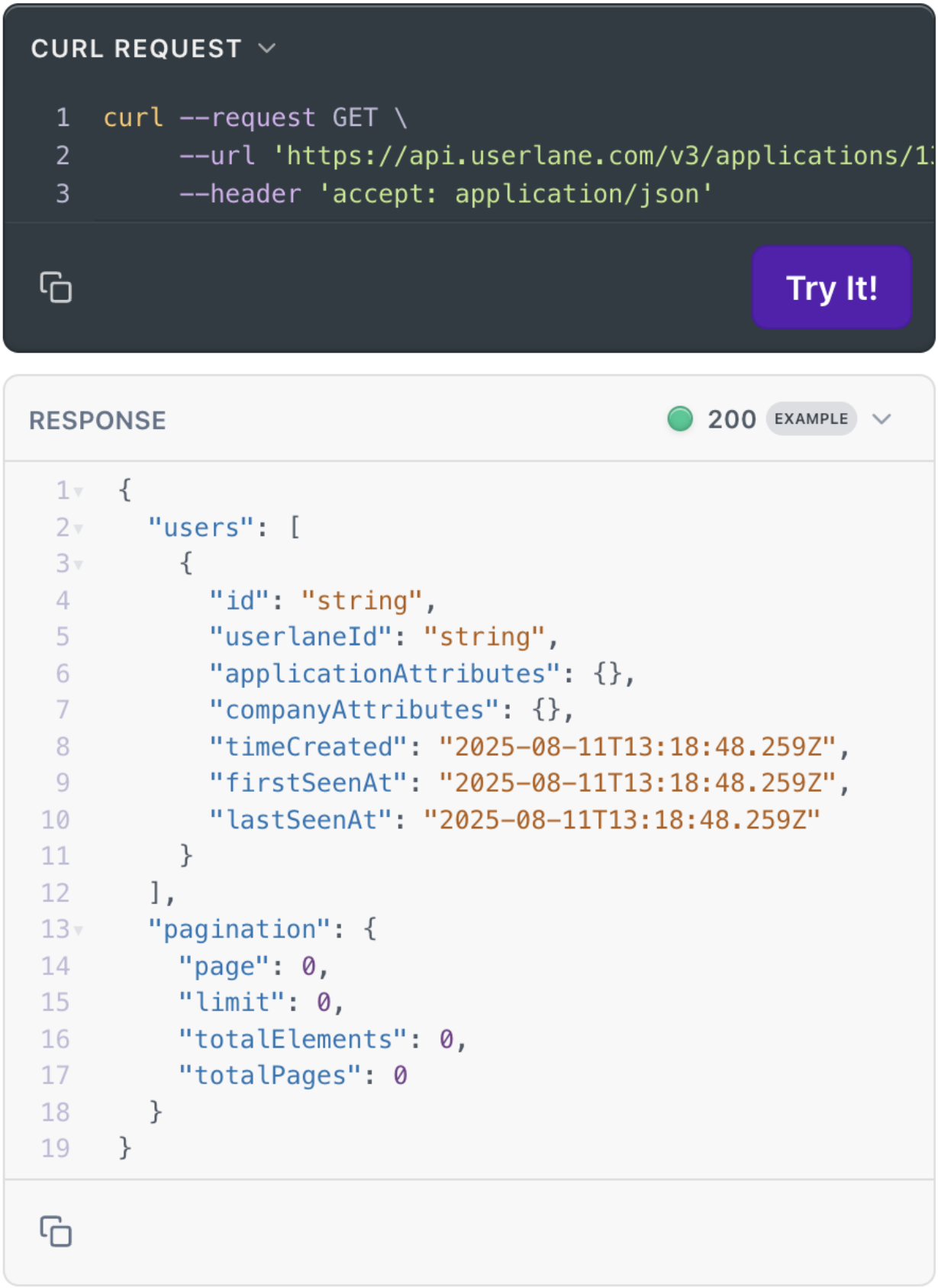
The request is only possible if authenticated with the correct token. Paste it into the Authentication field:



Run the request

Once all the parameters are set, run the query by clicking on the “Try it” button in the CURL section.

If everything goes well, you see the results in the Response section below.



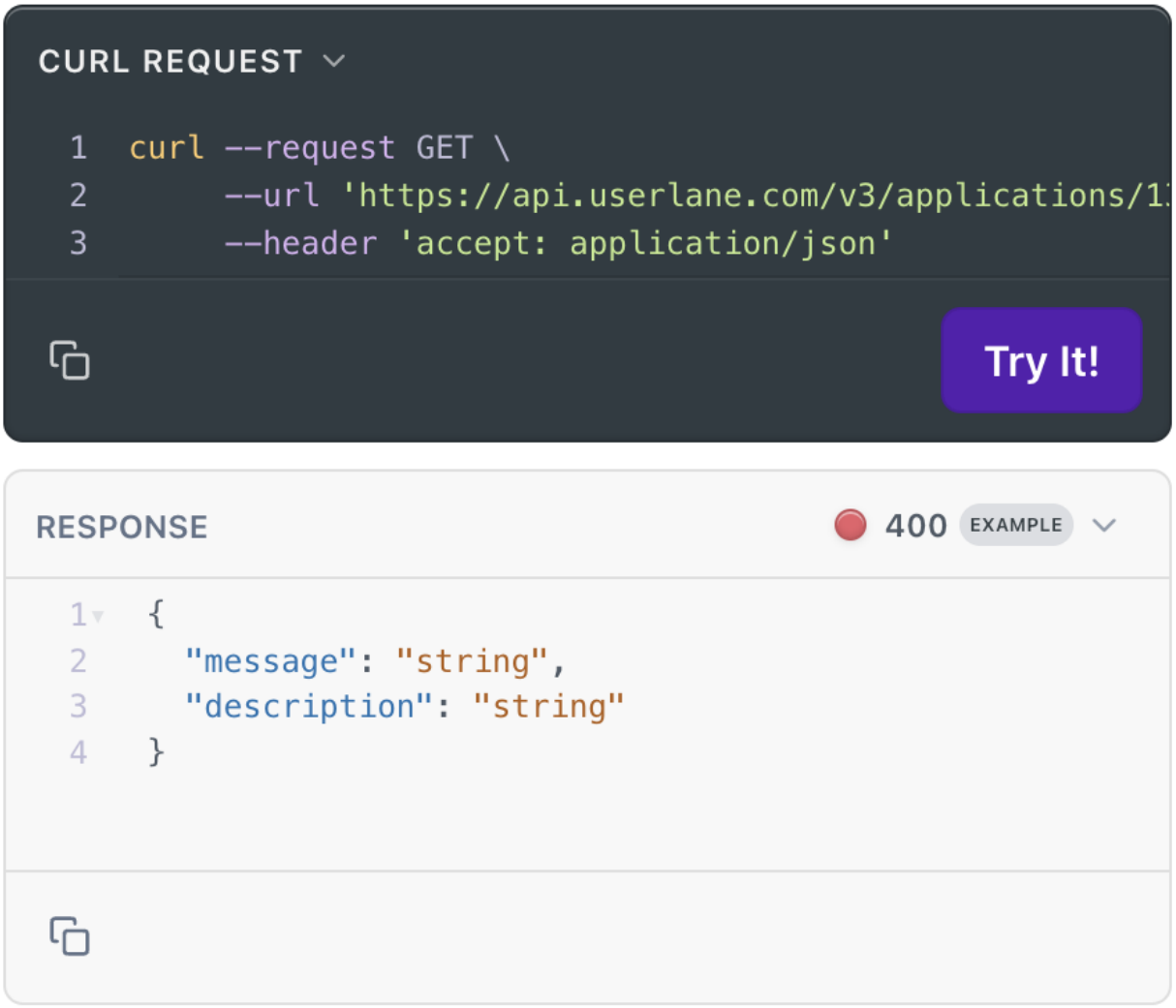
Copy the results by clicking on the Copy icon.

The request code can be copied as well and used in another tool.

Troubleshooting

If the request is not successful, you will see an error message in the result section. You may look for possible issues based on the message it contains.

The most common errors relate to the wrong date format or incorrect/ invalid token being used, like in this example:



If you see any errors, please revise all the data based on the article. If the issue still occurs, please reach out to us.

Push user attributes via API

Last Modified on 18.06.2026

About the Attribute Import API

The Attribute Import API lets you send user attributes into Userlane from your own systems, in JSON format. Use it to push attributes such as role, department, region, or licence type from your data warehouse, internal service, or a scheduled job, so Userlane always reflects the user attribute data you already hold.

Why use it

Use the API to:

- keep Userlane user attributes current automatically, on your own schedule, instead of uploading spreadsheets by hand
- segment analytics and target content by attributes that live in your own systems, not just those sent at login

What you can send

In a single request you can send two kinds of rows, on their own or together:

- **Attribute definitions:** create or update the attributes themselves (a name and a type).
- **User profile values:** set values for individual users, keyed by your own public user ID.

You only need a definition for an attribute that does not exist yet. If the attribute already exists, skip the definitions and just send the value under its key in the user's profile. Send a definition only when you are introducing a new attribute, or changing an existing one's name or type. In most ongoing updates you are only sending user values.

Company or property scope

There are two versions of the endpoint. They work identically and differ only in scope:

- **Company endpoint:** the attribute applies across your whole company.
- **Property endpoint:** the attribute belongs to a single application.

An attribute sent to one scope never affects the other.

Company endpoint

Your company ID is a number.

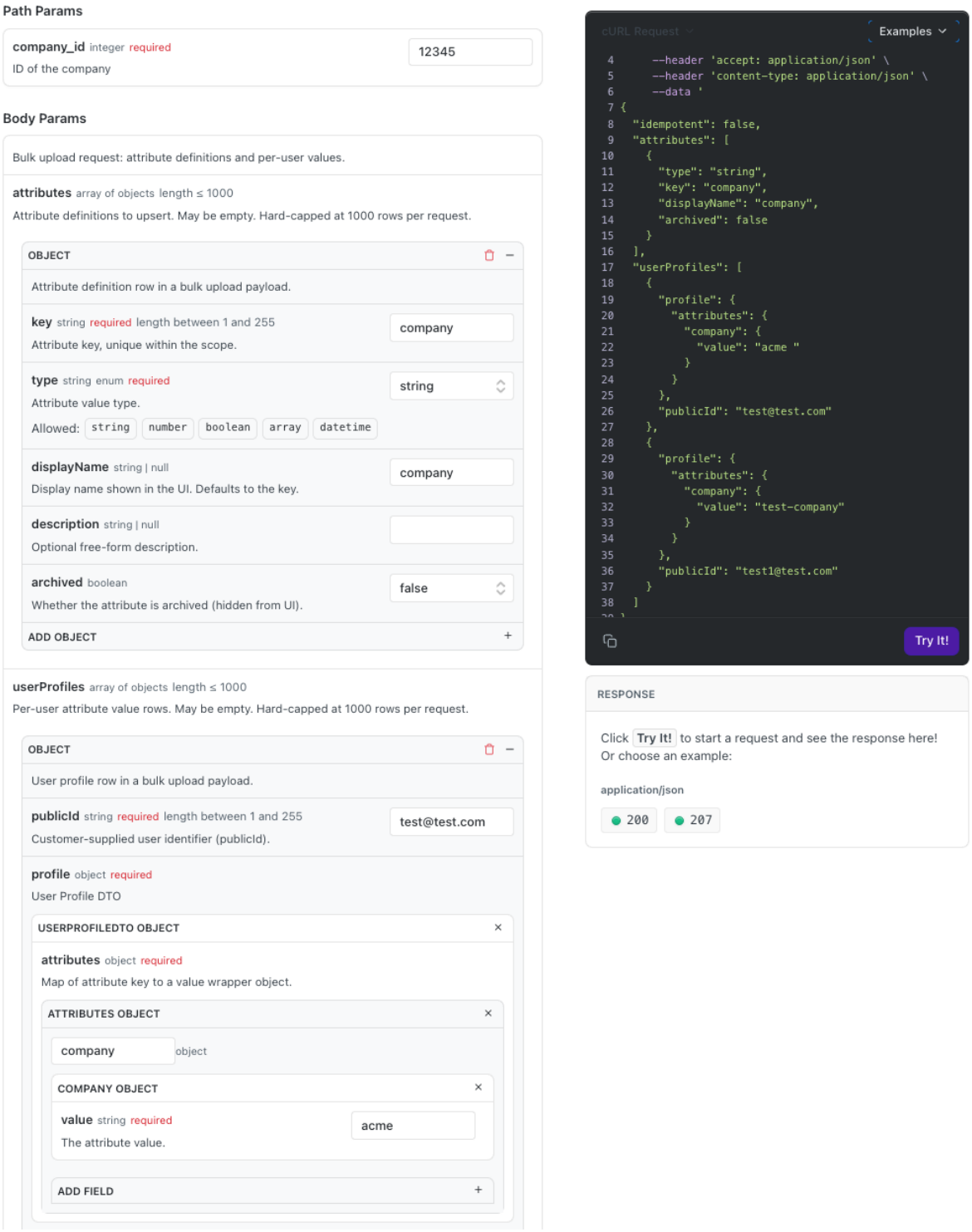
Public ID: test-user-123 USER CREATED

Last seen: - • Date created: **28 May 2026**

Company Attributes | Application Attributes

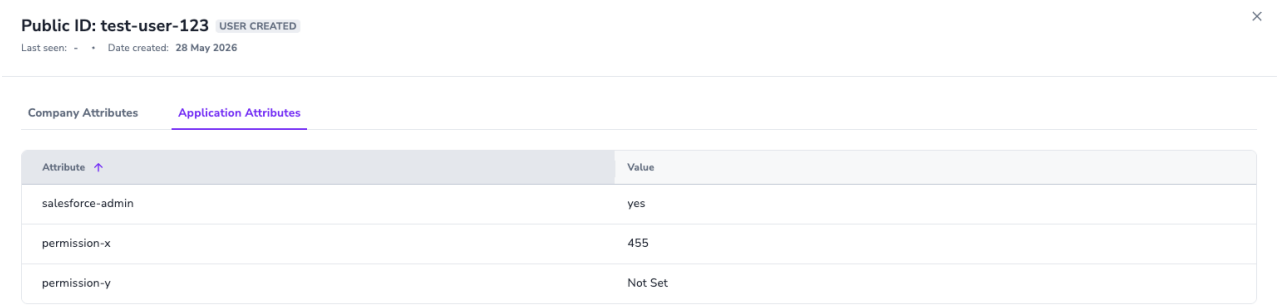
Attribute ↑	Value
City	Munich
role	product
is-manager	no
test-attribute	Not Set

Company endpoint

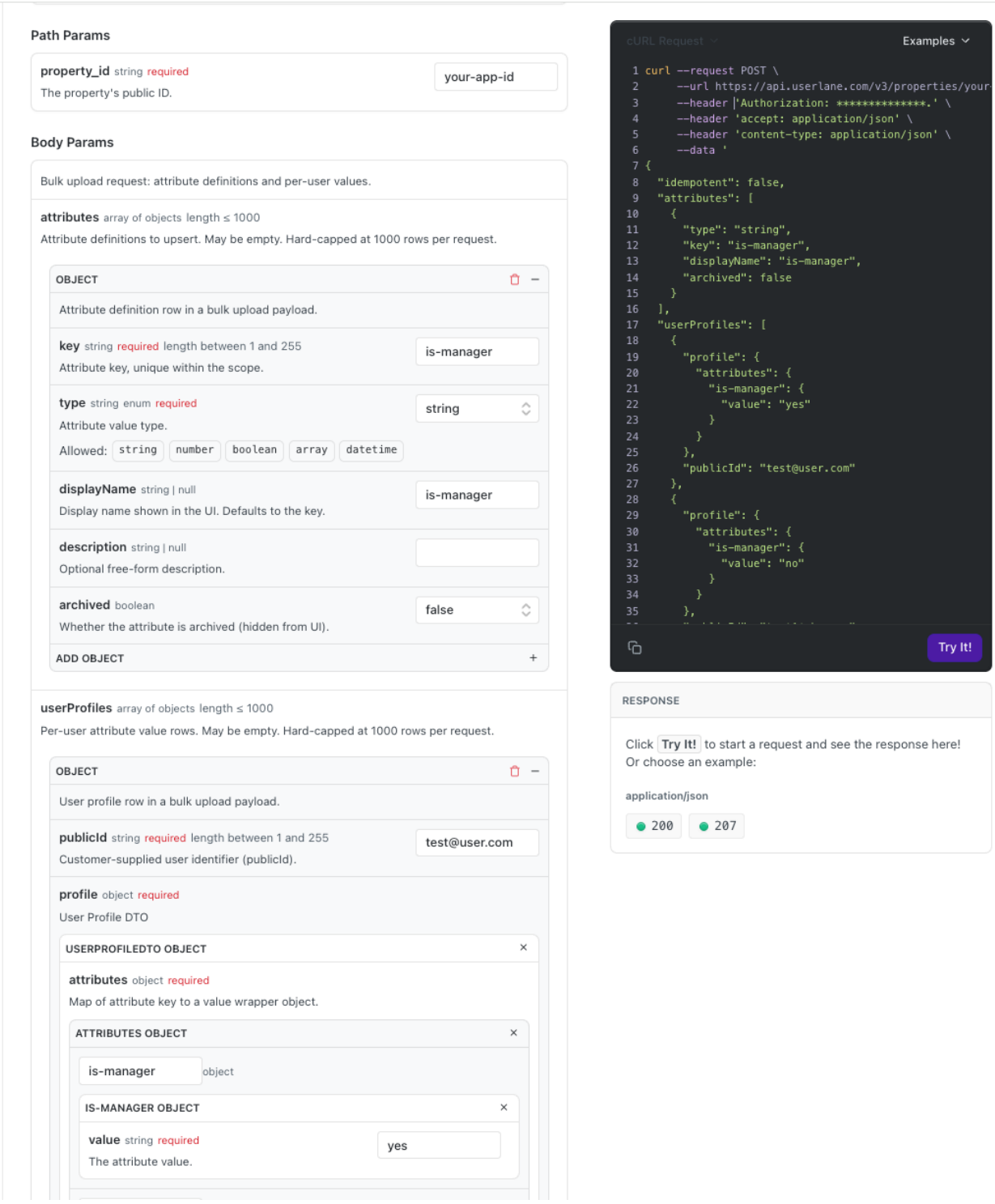


Property endpoint

In the API, a "property" is what the Userlane Portal calls an application, your property ID is a short text ID that you can find in your url path in the Portal when you are logged in to your property.



Property endpoint



How values are sent

Each value is wrapped in a small object with a `value` field. You do not send the value on its own.

Sending the value without the `{ "value": ... }` wrapper is the most common reason a first request is rejected.

To put the two pieces together: to set a value on an **existing** attribute, send only the user profile part with the value under its key. To introduce a **new** attribute, add a definition object for it first, in the same request, then set its value for the user.

Add new values, or replace existing ones

One setting, `idempotent`, controls what happens to a user's existing values:

- **`idempotent: false` (the default) adds.** The values you send are created or updated. Anything the user already has is left untouched. This is the safe, everyday mode.
- **`idempotent: true` replaces.** The values you send are written, and any other values that user already has, within the same scope, are removed.

Leave `idempotent` out when you want to add to what a user has. Only set it to `true` when your request contains the complete, final set of values for the users it names, and you intend to clear anything else. `idempotent: true` only affects the users you include in the request: users you do not mention are never changed.

How to push the data

Generate your token

The API is protected and requires authentication via an Authorization Token. You can generate your token in the Userlane Portal under **Settings > API Token**. The token is generated for each Userlane Manager individually, and the manager must be a **company admin**.

Test a request before you automate

Each endpoint is available in our developer documentation, which includes a "Try It" button you can use to send a request directly from the browser. This is the fastest way to confirm your token, IDs, and request body are correct before you write any code.

This is not a test sandbox. A request sent from "Try It" writes to the real users you name, using your real token. Always test against a test **user whose attribute values do not matter**, so your first attempts never touch real data.

To run your first request:

1. Open the Attribute Import API reference and choose the company or property endpoint.
2. Paste your token into the **Authorization** field.
3. Enter your **company ID** or **property ID** in the path field.
4. In the request body, set one attribute and one value for your**test user's** ID.
5. Leave `idempotent` as `false`
6. Click **Try It** to send the request.
7. Open that test user's profile in the Userlane Portal and confirm the value now appears.

Once a simple request works end to end, build the same call into your own system and run it on your schedule.

What each request needs

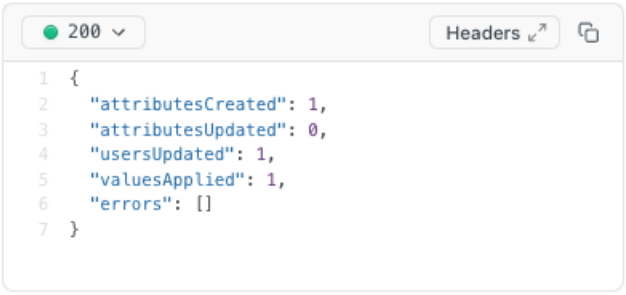
- **Company ID or Property ID** — the scope you are sending to, in the path.
- **Authorization token** — pasted into the Authorization field.
- **Attributes, user values, or both** — in the request body, with each value wrapped as `{ "value": ... }`.
- **`idempotent`** (optional) — `false` to add (the default), `true` to replace.

Limits

You can send up to 1,000 attribute definitions and up to 1,000 user records in a single request. The two limits

are separate. To update more users than that, split them across several requests (for example, 5,000 users as five requests of 1,000).

Reading the result



Every request returns a summary of what happened: how many attributes were created or updated, how many user values were applied, and an `errors` list.

- If `errors` is empty, everything succeeded.
- If some rows failed, each entry names the exact user and attribute that failed and the reason, so you can fix just those and send again.

A response code of `207` means part of your request succeeded and part did not: check the `errors` list. A `422` means the whole request was rejected and nothing was applied: correct the request and resend.

Good to know

- **Attributes are matched by their key.** Sending a key that already exists updates it; sending a new key creates a new attribute. To avoid duplicates, keep your keys consistent (for example, always `job_title`, not sometimes `jobTitle`).

Troubleshooting

If the request fails, you will see an error in the result section. Most issues relate to:

- a token whose manager is not a company admin (`403`)
- an invalid or expired token (`401`)
- a request body that did not validate, usually a value missing the `{ "value": ... }` wrapper (`422`)
- values disappearing, which means the request was sent with `idempotent: true`

Review your parameters against this article. If the issue persists, please reach out to us.

For full request and response schemas, copy-pasteable code samples (curl, Python, Node), and every error code with its meaning, see the Attribute Import API reference.

Userlane Cookie Inclusion Policy

Last Modified on 31.03.2025

1. When Userlane Does Not Need to Be Included in a Cookie Policy

Userlane does not need to be included if:

- It is used **internally for software used by an organization's employees**
- It is used **externally in a B2B environment**, where the users are business users accessing software in a professional capacity.

Reason: In these cases, the use of cookies falls under corporate IT policies rather than consumer data protection regulations (e.g., GDPR).

2. When Userlane Must Be Included in a Cookie Policy

Userlane **must be included** in the cookie policy if:

- It is used in a **B2C (Business-to-Consumer) platform**, where the end-users are private individuals (not business users).

Reason: In B2C environments, consumers must be informed about cookies and tracking technologies under GDPR and similar regulations.

Note: Userlane places several cookies, and they should either all be set to "essential" or all to "functional", depending on whether Userlane is implemented to

a. support regulatory duties, e.g. mandatory onboarding or training of functionalities related to security/privacy (**essential**) or
b. is used for analytics only (**functional**)

3. Userlane as an Essential Cookie (No Opt-Out Required)

Userlane should be classified as an **essential cookie** (without opt-out) if:

- Both Userlane Guides and Analytics are used to comply with legal or regulatory requirements (e.g., GDPR, DORA) by training users in specific features related to compliance, such as setting up 2FA or guiding them through critical workflows.

Reason: Essential cookies are required for the platform to meet regulatory obligations, and user consent is not required for their use.

4. Userlane as a Functional Cookie (Opt-Out Required)

If Userlane is used only for analytics purposes, it should be categorized as a functional cookie, requiring user consent with an opt-out option.

Action:

- The cookie policy should state that users can opt out of Userlane analytics tracking.
- Implement the process outlined in Annex 2 for enabling opt-out.

Reason: Functional cookies enhance user experience but are not necessary for the platform's core functionality. Therefore, under GDPR, users must have the choice to opt out.

Note: Userlane sets several cookies Opting out also disables the option to display Userlane guides or any other Userlane content in the application.

5. Userlane Is Not a Marketing Cookie

Userlane **must never be classified as a marketing cookie** as:

- It does not track users for advertising purposes.
- It does not collect or share data for remarketing or third-party ad platforms.
- It is used strictly for **platform guidance, usability, and analytics**.

Conclusion: Userlane is either an essential or functional cookie, never a marketing cookie.

Summary Table

Use Case	Include in Cookie Policy?	Cookie Category	Opt-Out Required?
Internal employee use (B2B, training, onboarding)	□ No	Not applicable	Not applicable
External B2B use (business users, corporate software)	□ No	Not applicable	Not applicable
B2C use (private individuals as end-users)	□ Yes	Functional or Essential	Depends on category
Userlane used for regulatory compliance (e.g., GDPR, DORA)	□ Yes	Essential	□ No opt-out
Userlane used only for analytics	□ Yes	Functional	□ Opt-out required

A comprehensive list of Userlane cookies can be found here.

Required Actions

- Evaluate if Userlane needs to be included in your cookie policy.
- Ensure Userlane is correctly categorized in your cookie policy.
- Include Userlane cookie policy statement.
- Implement opt-out functionality if Userlane is classified as a functional cookie.

Userlane Cookie List

Last Modified on 31.03.2025

This help doc provides a comprehensive overview of the cookies used at Userlane and their purpose.

List of Cookies

Here is a summary of all Cookies and LocalStorage items that Userlane's embeddable frontend package (userlane.js) might store on the user's device.

Name	Type	Purpose	Storage Duration	Required
userlane-context	Cookie	Storing status of the UI and related context of Userlane	5 minutes	Yes
userlane-app-session	Cookie	Storing status of Userlane analytics session	30 minutes	Only when HEART analytics is enabled
userlane-user	Cookie	Identify the user to show consistent status of content (e.g. mark guide as done)	5 years	Only in cases when no user identifier is passed into the Snippet
userlane-assistant-context	LocalStorage	Storing status of the UI and related context of Userlane	indefinitely	Yes
AUTH_SESSION_ID	Cookie (third-party)	Storing the user authentication session ID.	Session	Yes (if end user has access to the Portal)
KEYCLOAK_IDENTITY	Cookie (third-party)	Storing a token used to verify the identity of the user.	Session	Yes (if end user has access to the Portal)
KEYCLOAK_SESSION	Cookie (third-party)	Storing information about the user session.	Session	Yes (if end user has access to the Portal)

Detailed information on the cookies and local storage items listed above:

Name	Detailed information

userlane-context	**It has two purposes:** 1. When starting a guide on domain A, Userlane saves information about the current guide (e.g. guide ID, current step index, etc.) inside this Cookie. When the user switches to domain B while playing the guide, Userlane initially doesn't know anything about the current guide because it's a new environment. This Cookie informs Userlane about the current context so that the guide can be continued seamlessly. 2. Show the Userlane Editor for end users who create and manage content across different pages or domains. When the end user opens the Editor on page or domain A, the information that the Editor is open is stored in this Cookie. When the end user switches to page or domain B, the end user can continue working in the Editor from the same section.
userlane-app-session	It contains app session information which is used for Userlane-related analytics. With this Cookie, the app analytics events can be aggregated and assigned correctly. It is stored in a Cookie so the user session can be tracked correctly.
userlane-user	This cookie is only used for a special implementation case when there is no user ID passed within the snippet. In this case, Userlane generates a random ID and stores this ID in this cookie. It is used so the Userlane assistant can show the end user the correct progress (e.g. played guides or announcements already shown).
userlane-assistant-context	It contains information about the state of the Assistant. For example, the user can move the Userlane Assistant to different positions by dragging and dropping it around. This position (e.g., "bottom-right") is stored in this local storage entry so that the Assistant can be displayed correctly for each user based on their preference.
AUTH_SESSION_ID	It contains the ID of the authentication session for a user during the authentication process. It is used by Keycloak to identify the user in the authentication flow (e.g., after the user has typed the email, before the password is typed).
KEYCLOAK_IDENTITY	It contains an authentication token for an authenticated user in the format of JWT (JSON Web Token). It contains information about the user, its authorization roles, and other information useful for the application to determine and identify the user and its permissions.
KEYCLOAK_SESSION	It contains the ID of the session for an authenticated user. It is used by Keycloak to determine if a user is logged in.

Userlane Cookie Policy Statement

Last Modified on 02.07.2026

If Userlane is used in a B2C environment targeting private individuals, we recommend including one of the following statements in the cookie policy.

Userlane places several cookies, and they should either all be set to “essential” or all to “functional,” depending on whether Userlane is implemented to

a) support regulatory duties, e.g. mandatory onboarding or training of functionalities related to security/privacy (essential) or

b) is used for analytics only (functional)

Userlane is classified as an essential cookie.

Our platform uses Userlane, to provide in-app guidance and ensure compliance with regulatory and security requirements. These cookies enable critical workflows and help users navigate required processes. Disabling these cookies would impact the platform’s ability to fulfill compliance requirements.

- **Purpose**: Ensuring compliance with regulatory requirements, guiding users through mandatory security and operational workflows, and ensuring users understand required platform features.
- **Data Processed**:
    - **Session data** (e.g., active session ID, authentication status) to ensure continuous access to required compliance processes.
    - **Interaction data** (e.g., completed steps in mandatory workflows) to verify that users have followed necessary procedures.
    - **Feature usage data** (e.g., whether a compliance-related feature was used or acknowledged) to document adherence to legal requirements.
    - **Navigation events** (e.g., page visits related to legal training) to confirm that regulatory training was completed.
- **Retention Period**: Data is retained only as long as necessary to demonstrate compliance with legal requirements.
- **Opt-Out Option**: These cookies are essential for compliance and security purposes and cannot be disabled.

More detailed information is available at Userlane’s End-User Privacy Policy at userlane.com/end-user-privacy

Userlane is classified as a functional cookie.

Our platform uses Userlane to enhance user experience and improve usability by analyzing how users interact with features and guidance elements. These cookies help us optimize workflows, identify areas where users need more support, and enhance overall usability. As these cookies are not required for the platform’s core

functionality, you can choose to disable them.

- **Purpose**: Tracking platform engagement, improving usability, and understanding user interactions.
- **Data Processed**:
    - **User interactions** (e.g., clicks, hovers, engagement with tooltips and guides) to analyze feature adoption.
    - **Navigation patterns** (e.g., pages visited, time spent on certain sections) to identify usability bottlenecks.
    - **Guide completion data** (e.g., whether users finish an onboarding tutorial) to improve tutorial effectiveness.
    - **Error tracking data** (e.g., failed actions or frequent exits from a process) to optimize platform guidance.
- **Retention Period**: Data is stored for analytics purposes and is anonymized where possible. Retention follows standard data protection policies.
- **Opt-Out Option**: You can disable these cookies in your [cookie settings] or [privacy preferences].

More detailed information is available at Userlane's End-User Privacy Policy at userlane.com/end-user-privacy

Implementing the Cookie Opt-Out Functionality

Last Modified on 31.03.2025

Note: This should only be implemented if Userlane is on an external application for private individuals (B2C) and only the Userlane analytics (not guidance) is in use.

Userlane should be configured as a functional cookie in the cookie banner. If a user opts out of the functional cookie, Userlane won't load, and no Userlane content will be available for this specific user.

Please complete the following instructions:

1. Executing Userlane after the user has provided cookie consent

1. The Userlane 'init' (short for initialize) command is used in conjunction with a Userlane-specific property ID to execute a customer instance of Userlane.
2. Trigger the 'init' command after the user has accepted Userlane cookies. This can be done by configuring a logic where the 'init' command is only triggered if and when the user has accepted the cookies.
3. The Userlane API 'init' command Userlane('init', your_property_id); is customer-specific and requires your specific property ID, which can be found in the Userlane Portal.

2. Removing Userlane if a user has adjusted their cookie preferences

1. The Userlane 'remove' command can be used to withdraw the initialization of the Userlane product.

2. Trigger the 'remove' command after the user has adjusted their cookie settings. This can be done by configuring logic that triggers the 'remove' command if the user changes their cookie preferences and chooses not to accept Userlane cookies if they have been classified as functional.

3. Notably, the customer must also ensure that this user's cookie preferences are stored and that the Userlane 'init' command is not executed for that user again at a later time.

4. The Userlane API 'remove' command Userlane('removeUserlane'); is global and does not require the use of a specific id in order to withdraw the Userlane product from the application.

More information on working with the Userlane API can be found in the Userlane API documentation.

Data Security & Privacy Principles of Userlane

Last Modified on 29.12.2025

The security and integrity of all data that enters or leaves any Userlane system are of high value to us.

We constantly strive to build on our high standards and leverage them to provide our clients with the peace of mind that their business is running in a secure environment.

We do this by living and fostering a culture that is security-aware and privacy-aware.

We built Userlane as a privacy-first company because we strongly believe that security and privacy must be a deep-rooted and upheld value of organizations worldwide.

Our approach to security and privacy is built on the following three principles:



Data frugality

Userlane only stores data that is required to deliver its services.

By default, we minimize the amount of data that runs through our systems.

Thereby we ensure critical data is neither collected nor processed by us unless our customers explicitly demand it for targeting, analytical or compliance purposes.



Proven technologies

We validate our technology choices with industry best practices and vendor compliance processes.

We rely on languages, frameworks, and systems that are used in business-critical applications by various enterprises and governmental agencies around the world.



Highest security standards

We apply high-security standards with every change we make.

We are aware that a chain is only as strong as its weakest link, so every choice matters.

Our culture and values embody the high responsibility we take on.

Security & Privacy Certifications

Last Modified on 09.08.2024

Userlane is ISO 27001 certified.

About ISO 27001

ISO 27001 is widely recognized and respected and provides a framework for information security management practices. It establishes requirements for information controls to manage people, processes, and technology. ISO 27001 is accepted worldwide to ensure that proper and continual measures have been taken to protect valuable company data.



Statement of Applicability: Development, operation, and support of a digital adoption platform

The current certificate is valid from 25th July 2024 until 24th July 2027 and can be viewed here.

Userlane will of course renew the certificate continuously.

Rolling out the new Userlane Browser Extension to all users

Last Modified on 19.06.2024

The following article is addressed to organizations that have rolled out the Userlane Browser Extension to their employees. If you have implemented the Userlane snippet in the underlying application, no changes are required.

Introduction

We have built a new Userlane Browser Extension to create a safer and more enjoyable browsing environment for our end users. Adhering to the most recent extension architecture guidelines introduced by Google, known as Manifest v3, our new Browser Extension comes with an improved performance alongside heightened security.

What is Manifest v3?

Google introduced a new framework for the development of browser extensions, known as Google Manifest v3. This framework is designed to enhance the privacy, security, and overall performance of browser extensions. It is scheduled to be implemented in Google Chrome and Microsoft Edge by the end of 2024. Meanwhile, Mozilla Firefox has already incorporated support for extensions based on Manifest v3.

> If you want to get into more technical details, access the following documentation link from Google.

Upcoming changes

The new Userlane Browser Extension is a security and performance upgrade. **This upgrade will not impact any existing user workflows**.

Migration process

Throughout the summer of 2024, we will gradually introduce the upgrade to all of our Browser Extension users, paying close attention to their feedback every step of the way. The upgrade procedure is designed to be smooth and hassle-free. Users selected for the rollout will have the upgrade automatically installed by their web browser.

However, there might be instances where the latest upgrade does not get installed:

- If you are using an outdated version of your web browser, or
- if your organization's IT team has not yet allowed the Userlane Browser Extension upgrade to its users.

That is why we created a checklist you can share with your IT team to ensure a smooth rollout of the new Userlane Browser Extension.

Checklist

1. Use a supported web browser

The following web browser versions are supported:

- Chrome: 88 and above
- Edge: 88 and above
- Firefox: 109 and above

The Userlane Browser Extension will **not** work correctly if you use an unsupported web browser version.

2. **Review the Browser Extension Update Management Process of your organization**

Some organizations manage the time when the latest browser extension updates are deployed to their employees. For example, they schedule these updates to happen weekly. As a result, it could take additional time for the update to be available to you.

To ensure a smooth upgrade process, we recommend you allow the Userlane Browser Extension to receive updates once they are available in the web browser stores.

> If you have any questions about any Userlane Browser Extension requirements, reach out to your CSM anytime.

How do I know if I use the latest version of the Userlane Browser Extension?

Access the settings of your web browser and navigate to Extensions. Check the version of the Userlane Browser Extension:

- version 23.x.x: you are using the old Userlane Browser Extension
- version 30.x.x: you are using the new Userlane Browser Extension

What happens if I continue to use the old Userlane Browser Extension?

Userlane will stop supporting the old Userlane Browser Extension in September 2024.

The old Browser Extension may still work beyond September 2024, but we won't provide any technical support for it if you encounter any issues or bugs. Based on the Manifest v2 support timeline documentation, Google will stop supporting Manifest v2 Browser Extensions in Q4 2024/Q1 2025.

Userlane Partners with Microsoft for Secure Infrastructure & Hosting

Last Modified on 12.01.2024







 Userlane's availability is guaranteed to exceed 99.5%. We regularly achieve higher uptime and the live status as well as historic data can be viewed on Userlane's Statuspage.

Why we chose Microsoft Azure

Userlane decided to work with Microsoft Azure to ensure the strict security and compliance requirements of our enterprise and public service clients are met and allow us to provide a scalable, frictionless service at a global scale.

Userlane is a certified partner of Microsoft.

By joining forces with the industry leader Microsoft, Userlane can rely on a proven security architecture: Over 3,500 dedicated Microsoft cybersecurity professionals help protect, detect, and respond to threats.

All of Userlane's databases, application servers, and network infrastructure are hosted by Microsoft Azure.

By relying on Microsoft, Userlane can leverage significant investments that have been made towards the security and compliance of data centers:

- Microsoft Azure is certified with ISO 27001 - a common standard in the industry.
- Since the beginning of 2017, Microsoft Azure is also certified with ISO 27018 - a new standard for the protection of personal data in the Cloud.
- Read Microsoft's Whitepaper about Microsoft Azure Security, Privacy, Compliance

Security Operations

Last Modified on 29.12.2025

Encryption

Data at rest

All databases use a so-called "at rest" encryption. This means that data can only be read if proper authentication takes place on the respective database system. The files in which the data is stored are stored in encrypted form so that they can only be read by database systems that have the appropriate decryption key. Userlane strives to keep its systems up to date with the newest and most secure encryption algorithms. The standard algorithm for encrypting data at rest is currently AES256. Encryption keys are securely managed by Microsoft Azure using Key Vault.

- Read Azure's principles on Encryption At-Rest

Data in transit

Userlane applies transport encryption whenever data has to be transmitted over an insecure or public network (e.g. outside the virtual private cloud). The type of transport encryption depends on the encryption requested by the client system. Userlane uses HTTPS connections with SSL certificates and TLS 1.2/1.3 for all communications with clients. This ensures that data is protected against interception or modification.

Selection of encryption algorithms

Userlane follows the NIST standards for selecting strong encryption algorithms and approving built-in encryption used by a Userlane subprocessor.

- Read the NIST SP 800-175B guidelines

Segregation of traffic in multi-tenant environment

Userlane's Cloud systems implement multi-tenancy in a shared cluster. Multiple customers are served from a single cluster. Tenant separation is enforced on a logical level, not on a physical level. Userlane ensures strict tenant separation through the following measures:

1. Input sanitization and pre-built queries
2. Request isolation
3. Use of frameworks
4. Extensive manual and automated testing
5. Security scans
6. Penetration testing (see below)

Firewalls

Userlane works with Azure Network Security Groups to ensure that services running within the Azure environment are accessible only to the networks that need it. Access to network ports of various services is restricted to the extent that access is only possible through services that need access.

Penetration Tests

Userlane works with recognized security experts and researchers. Together we aim for the highest possible security of our systems.

We perform penetration tests on a yearly basis. Our contractor Cobalt maintains a core of 200+ highly vetted, certified security researchers.

Upon performing each penetration test, Cobalt provides Userlane with a report containing the list of detected vulnerabilities along with recommended fixes. Userlane commits to implement fixes depending on the severity of the vulnerability. The timeline for such fixes is set as follows:

- Critical vulnerabilities: Fix immediately
- High vulnerabilities: Fix within 30 days
- Medium vulnerabilities: Fix within 60 days

Once a fix is implemented, the vulnerability is re-tested. The cycle is repeated until all vulnerabilities are confirmed to be fixed.

Monitoring

Userlane uses various monitoring tools to ensure maximum availability, performance and security of the application. The monitoring includes but is not limited to the following parameters:

Availability

- Availability of the application
- Accessibility of backend systems and services

Resources

- CPU utilization
- Utilization of network interfaces
- Utilization of persistent and volatile storage

Performance

- Response times of the application
- Response times of backend systems
- Query times for database contents

Security

- Update status of systems
- Error logs
- Access logs (IP address, URL, browser type and version)

Backups

Userlane drives continuous backups of databases. With those database systems that support it, the database state can be restored to a previous state down to the second. Other databases are backed up regularly, e.g. every 24hrs. The backups are stored in the same datacenter region, but a different availability zone. Backups are retained for 30 days. These backups are treated as sensitive data. Only specific personnel can access these backups after an internal authorization process.

Data residency options

Last Modified on 10.06.2026

ℹ Data is completely separated between the hosting options to assure compliance with the requirements of data being held either in the EU or the US. Hence, we offer 2 residency options that customers can choose during Userlane account setup.

Userlane offers dedicated hosting in the EU 🇪🇺

In order to ensure full compliance with GDPR and the Schrems II ruling, Userlane guarantees to only use Microsoft Azure Datacenters based in the EU. Microsoft is our trusted partner in keeping customer data secure and operating in compliance with all EU regulations.

Read Microsoft's commitment to store and process EU data only in the EU.

- EU datacenter: Microsoft Azure "Europe West" in Netherlands

Userlane offers dedicated hosting in the US 🇺🇸

In order to ensure full compliance with CCPA, Userlane guarantees to only use Microsoft Azure Datacenters based in the US.

Microsoft is our trusted partner in keeping customer data secure and operating in compliance with all US regulations.

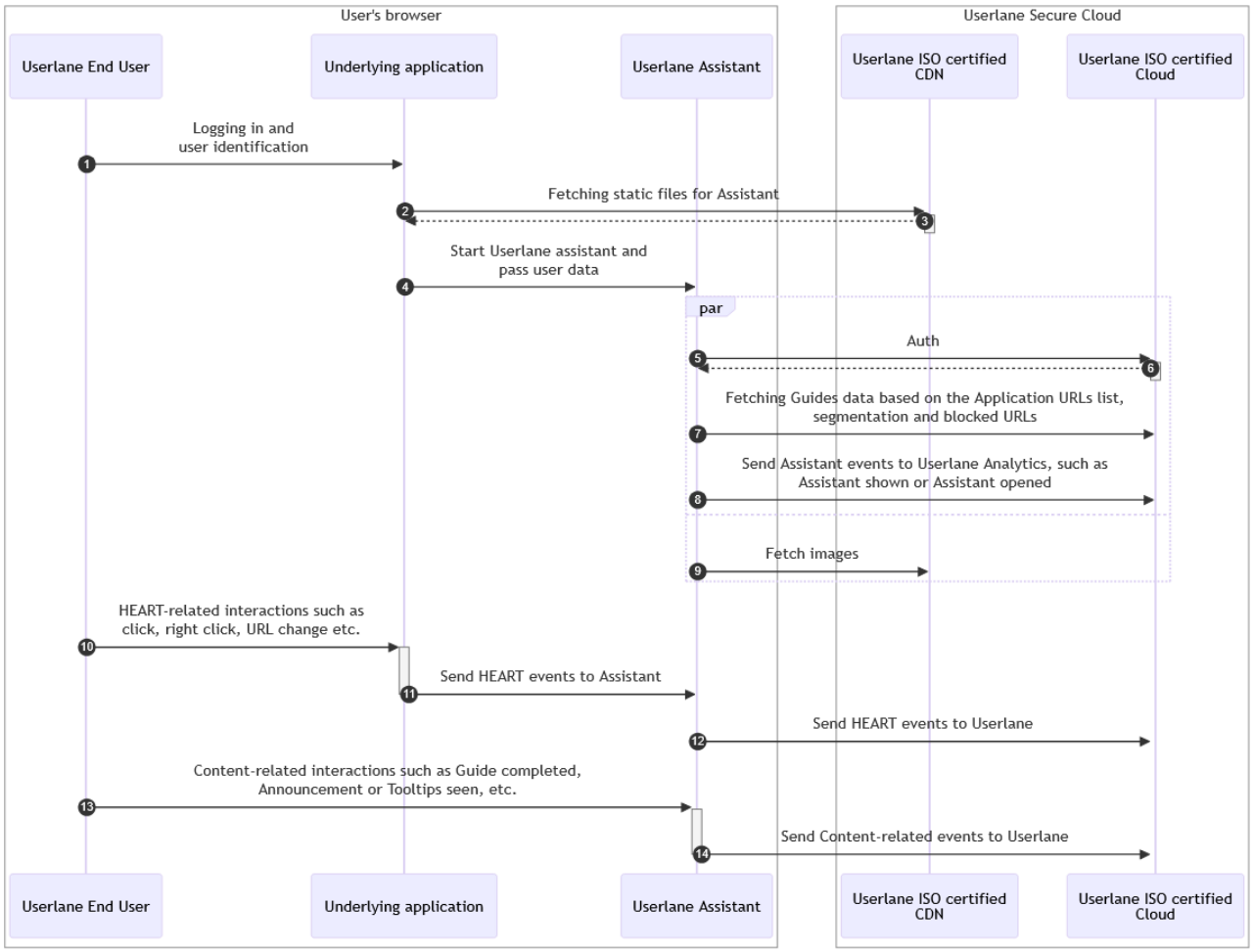
- US datacenter: Microsoft Azure "East US" in Virginia, USA

Data flow for Userlane JavaScript Snippet implementation

Last Modified on 09.01.2025

What is this article about?

This data flow maps out the flow of information from the end user to Userlane and back.
Below, you can find a diagram of the data flow, followed by a list of the recorded data fields and their purpose.



Recorded data field	Purpose
Information that can be sent to Userlane based on the Portal configuration	
Userlane Application and Company IDs	To identify which application Userlane is loaded upon and fetch relevant content.

Recorded data field	Purpose
URL	To identify which application Userlane is loaded upon and fetch relevant content. The URL is also used within HEART analytics if the corresponding options are enabled in the Portal. For more information, please check below the type of events that Userlane can collect based on your configuration.*
URL patterns	To have the snippet detect whether Userlane should be loaded.
User ID	To identify the same user again when returning to the underlying application. If no User ID is passed into the JavaScript Snippet, Userlane automatically creates one and stores it in a Cookie. This can be an anonymous identifier that does not qualify as personal data. Once the user is identified, Userlane shows how many Guides have been completed, whether the Announcement was already shown, etc.
Origin	To identify how the user was created (e.g., whether it was generated by the Userlane JavaScript snippet, BX, via email invite, etc.)
User Data (optional)	To segment users with the help of attributes. Attributes are never automatically collected by Userlane. If no user data is passed into the JavaScript Snippet, Userlane works with empty/anonymous user profiles.
Browser	To guarantee browser compatibility.
Browser language and page language	To guarantee that the content will be shown in the correct language.
Sign-up time	To be able to use date/time-related segments. For example, by knowing the sign-up time, you can show certain onboarding materials only for one month.
User session	It passes user session-related information that is used to calculate various analytics-related metrics in Userlane. For more information, please check below the type of events that Userlane can collect based on your configuration.*

* When the end user interacts with certain underlying apps or Userlane elements, data is sent to Userlane

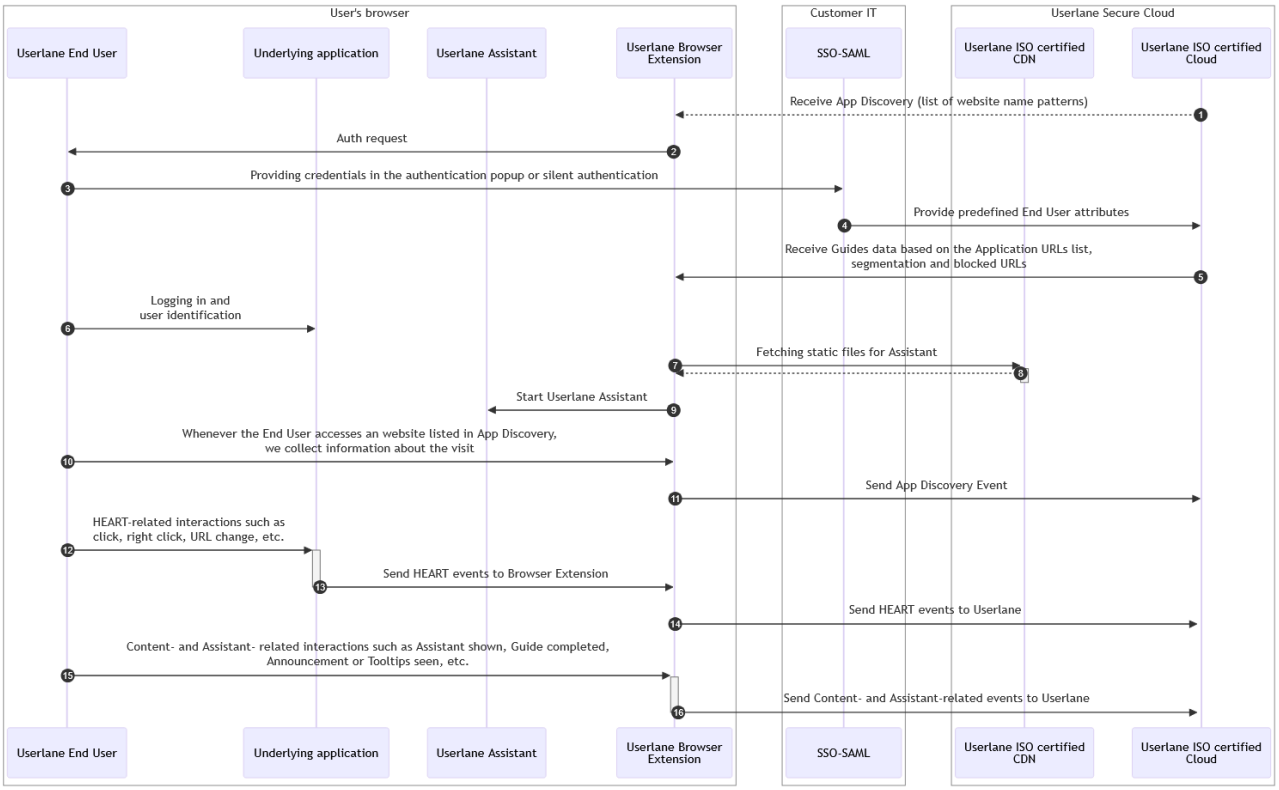
Cloud in the form of raw events. To learn more about Userlane-related events, please check the following wiki documentation.

Data flow for Userlane Browser Extension Implementation

Last Modified on 09.01.2025

What is this article about?

This data flow maps out the flow of information from the end user to Userlane and back.
Below, you can find a diagram of the data flow, followed by a list of the recorded data fields and their purpose.



Recorded data field **Information that can be sent to Userlane based on the Portal configuration**	**Purpose**
Userlane Application and Company ID	To identify which application Userlane is loaded upon and fetch relevant content.

Recorded data field	Purpose
URL	To identify which application Userlane is loaded upon and fetch relevant content. The URL is also used within HEART analytics and App Discovery if the corresponding options are enabled in the Portal. For more information, please check below the type of events that Userlane can collect based on your configuration.*
URL patterns	To have the Userlane Browser Extension detect whether Userlane should be loaded on that page.
User ID	To identify the same user again when returning to the underlying application. The User ID is automatically generated by Userlane when the Browser Extension is used. Once the user is identified, Userlane shows how many Guides have been completed, whether the Announcement was already shown, etc.
Origin	To identify how the user was created (e.g., whether it was generated by the Userlane JavaScript snippet, BX, via email invite, etc.)
User Email Address	To authenticate the user on the Browser Extension. Depending on the application setup, the user may have to share the email address: • when logging into the Userlane Browser Extension • when confirming the authentication process by clicking on the confirmation link received in the email invite. • when the user authenticates via SSO.
User Data (optional)	To segment users with the help of attributes. Attributes are never automatically collected by Userlane. They can be passed in the following way: • via CSV file upload (in the Userlane Portal) • automatically if passed from the Identity Provider via SSO.
User session	It passes user session-related information that is used to calculate various analytics-related metrics in Userlane. For more information, please check below the type of events that Userlane can collect based on your configuration.*

Recorded data field	Purpose
Browser	To guarantee browser compatibility.
Browser language and page language	To guarantee that the content will be shown in the correct language.
Sign-up time	To be able to use date/time-related segments. For example, by knowing the sign-up time, you can show certain onboarding materials only for one month.

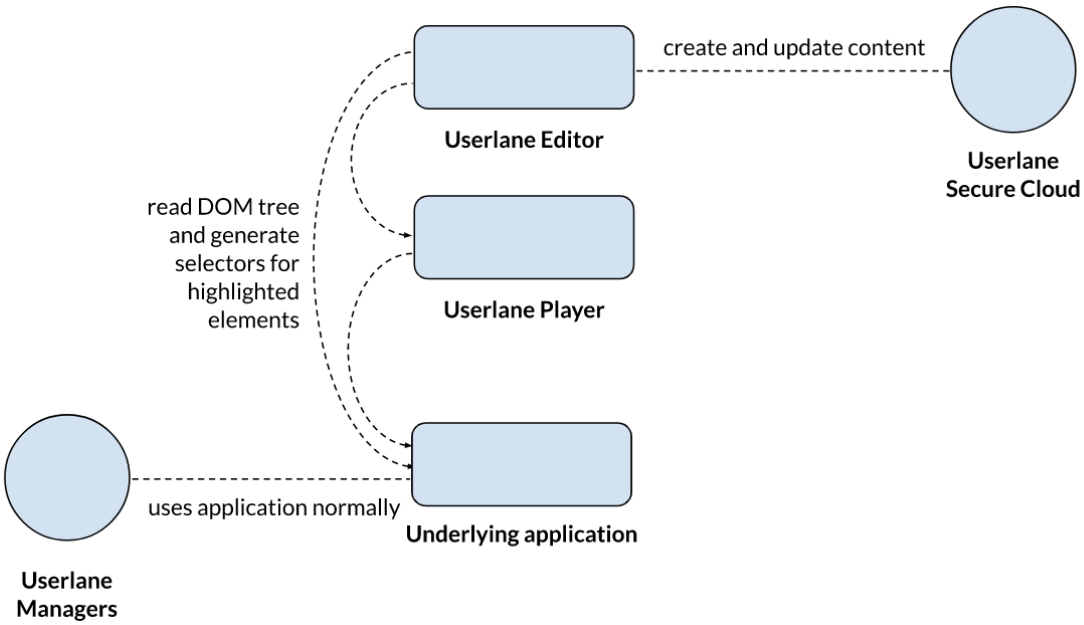
* When the end user interacts with certain underlying apps or Userlane elements, data is sent to Userlane Cloud in the form of raw events. To learn more about Userlane-related events, please check the following wiki documentation.

Data flow with the Userlane Editor

Last Modified on 03.01.2025

When using the Userlane Editor, there are additional data flows.

This applies to both the JavaScript Snippet and the Userlane Browser Extension.



In addition to the data fields recorded by the implementation method, the Editor records these fields:

Recorded data field	Purpose
Element Selectors - potentially including • Node type • All node attributes (id, name, role, class, and others that are set on the element) • Number of parents, siblings, and children • The same is also for all parents • The text content of the highlighted element during the recording	To generate selectors that allow Userlane to highlight the same element again in the Player. The text content might be used as a fallback if there is a complex element structure (e.g., dynamic CSS-IDs) for the highlighted element.
URL of each step	To identify which page each step was recorded on.

AI & Data Security

Last Modified on 29.12.2025

At Userlane, we understand the importance of transparency, security, and privacy, when it comes to handling your data and utilizing artificial intelligence (AI) technologies.

We are committed to follow these principles:

1. Your data is your data

Your data belongs to you, and we treat it with the utmost respect and confidentiality.

2. Always secure

We employ robust security measures to ensure that your data is always secure, whether it's in transit or at rest.

3. Never shared with 3rd parties

Your privacy is paramount. We never share your data with third parties, ensuring complete confidentiality.

Frequently Asked Questions

Do you utilize AI?

Yes, we utilize advanced AI technologies, including large language models and proprietary machine learning models, to enhance our services.

What provider do you use?

We leverage the Azure OpenAI service hosted within our own infrastructure, tailored to your location or preferred data residency region.

> ℹ As Microsoft partners, we utilize Azure OpenAI services for some applications. This is an enterprise service provided by Microsoft and should not be confused with OpenAI's own offerings. Azure OpenAI service is a private deployment of OpenAI models that runs inside our own infrastructure and shares no data with OpenAI or any other third party.

How is data handled?

Like with any other of our services, your data is exclusively used and/or stored within our private tenant in Azure, guaranteeing its security and confidentiality.

Do you use customer data for training AI models?

No, we do not use customer data to train our AI models. We prioritize the privacy and security of our users'

information.

Is it in compliance with AI related regulations?

We are proactive in adhering to regulations such as the EU AI Act long before it entering into effect, prioritizing the safe and responsible use of AI.

How Userlane Uses AI

Last Modified on 24.10.2025

At Userlane, we integrate artificial intelligence (AI) to enhance the experience across our platform.

Our AI capabilities are designed with data security, user value, and transparency in mind. We use a **locally hosted** version of OpenAI's language models to power selected features in the Userlane Platform. Read more in this article.

Where We Use AI in the Userlane Platform

Portal Features

- **HEART AI-powered Insights:** We generate insights from HEART data to help you quickly understand what is going on and identify trends. The App overview page and each HEART letter contain those insights.
- **Survey and NPS responses summary:** We use AI to summarize text responses from the NPS comments and survey responses. That way it's easier to get a glimpse of what your users are saying without reading through all their comments.
- **Auto-translate Messages:** To save time, you can automatically translate your Messages (Announcements, Surveys, NPS) to different languages using our AI option.
- **AI-Powered User Segmentation:** Feature that helps you build user segments faster using conversational language.

Player Features

- **AI Assistant:** An intelligent Assistant within the Userlane Player that answers natural language questions.

Editor Features

- **Generate Text: Use AI to generate Guide text for you to reduce the amount of time and effort needed to create meaningful content.**
- **Auto-Translate Text:** An option to help you accelerate the content creation by instantly translating instructional text into multiple languages with AI.
- **Regex Validation in Guides:** AI helps you simplify the creation of validation patterns using natural language to generate regular expressions.
- **AI Regex Helper for Validators:** Easily generate complex regex validation rules using plain language descriptions.

Understanding Amplitude in Userlane

Last Modified on 22.10.2025

What is Amplitude?

Amplitude is a trusted product analytics platform used by many software companies to understand how users interact with their products. It helps teams make data-driven decisions by analyzing usage patterns and feature adoption. This allows organizations to continuously improve their software experience and deliver greater value to their customers.

Why does Userlane use Amplitude?

Userlane uses Amplitude to collect product usage data that helps our Product, Design, Engineering, and Customer Success teams better understand how our product is being used.It enables our teams to identify what delivers the most value for you.

This data allows us to:

- Measure customer health and adoption – to proactively identify how well your teams are engaging with Userlane and ensure you realize maximum ROI from your investment.
- Identify usability improvements – to continuously refine the Userlane experience, reducing friction for your end users and helping them achieve results faster.
- Prioritize enhancements that bring the most value to our customers – ensuring our product roadmap focuses on the features and improvements that directly accelerate your business outcomes and user success.

All data collected through Amplitude is used internally only by Userlane.
We do not share any data externally or with any third parties.

What kind of data is collected?

Userlane only collects data about usage within the Userlane product itself. This includes:

- Events triggered by defined clicks and interactions in the Userlane Editor and Portal.
- Basic information about the Userlane Manager account, specifically:
    - Email address
    - Userlane internal ID
    - Userlane role (Admin, Moderator, or Contributor)

No other personal or customer data is tracked or transmitted.
Our goal is to collect only the minimal information necessary to continuously improve the Userlane experience for all our customers.

What do customers need to do?

If you are using Userlane via the JavaScript snippet, please ensure that your Content Security Policy (CSP) allows connections to Amplitude. To do so, add the following domain to your CSP whitelist:

*.amplitude.com

This ensures that Userlane can send analytics events securely to Amplitude.

If you are using Userlane through the browser extension, no action is required.

Subprocessors

Last Modified on 11.03.2026

Preamble

This subprocessor list identifies processors within the meaning of Art. 28 GDPR of Userlane that provide services that power Userlane's offerings based on the Userlane Master Subscription Agreement / Terms of Service (hereinafter: "Main Contract") and the Data Protection Addendum (hereinafter: "DPA") concluded between the parties.

Subprocessors who provide technologies to power the Userlane's offerings

Subprocessor	Data processed	Purpose of processing	Processing location
Microsoft Ireland Operations, Ltd. (Microsoft Azure)	All as defined in Schedule 1 of the DPA	Data Center Management (Userlane serves all its applications from Microsoft Azure Datacenters)	EU
Mailgun Technologies, Inc. (Mailjet)	Email addresses of Admin Users; Email addresses of End Users only if configured by Admin Users	System relevant Email communications (e.g. Manager Invite, User Invite, Password Reset, Guide Alarm)	EU
Sentry 45	All as defined in Schedule 1 of the DPA	Diagnose, fix, and optimize the code performance.	EU

Subprocessor	Data processed	Purpose of processing	Processing location
Coassemble Pty Ltd	Name, Email addresses of Admin Users;	Provision of online learning management services (e.g., hosting training modules, course enrollments, tracking completions)	Australia Standard Contractual Clauses (SCCs) Used
Planhat AB	Customer account, subscription, and usage analytics data	Customer Success management, analytics, and lifecycle operations	EU
Amplitude, Inc - Amplitude Analytics	Admin user identifiers (incl. email address and user ID), user attributes (e.g., role), and product usage telemetry/event data (user-linked events) for the SaaS Editor/Portal.	Product usage and engagement analytics (e.g., feature adoption, funnels, and reporting) to improve and operate the SaaS service	EU

Data Processing Agreement (DPA)

Last Modified on 08.04.2026

Data Processing Addendum (DPA)

This Data Processing Addendum supplements the Userlane Master Subscription Agreement / Terms of Service concluded by and between the Customer (referred to as “Customer” or “Controller” hereinafter) and Userlane GmbH, St.-Martin-Str. 102, 81669 Munich, Germany (referred to as “Processor” hereinafter).

Preamble

This Data Processing Addendum (hereinafter: ”Agreement” or “DPA”) specifies the contractual parties’ obligations under data protection law resulting from the Processor´s data processing on behalf of the Customer based on Userlane Master Subscription Agreement / Terms of Service (hereinafter: “Main Contract”) concluded between the parties.

Section 1 Object of the DPA; Controller Instructions

1) The Processor processes the Customer’s personal data. Type and purpose of this data processing can be consulted in Schedule 1 of this Agreement and in the Main Contract.

2) The Customer is authorised to issue instructions to the Processor regarding the data processing. In principle, instructions are to be issued in text form. If, on an exceptional basis, instructions are given verbally, they are to be subsequently documented in writing in text form without delay by the Customer. The Processor and all the Processor´s subordinates with access to personal data may only process the data that are the object of this Agreement further to the Customer’s instruction, including the powers granted in this Agreement, unless they are legally obliged to do the processing. This applies in particular to the transfer of personal data to a third country or to an international organization. The Processor shall inform the Customer without delay if they believe that an instruction violates data protection regulations. The Processor shall be entitled to defer the execution of the instruction in question until such time as it is confirmed or changed by the Customer. If the processor is obliged by Union or the Member State law to which it is subject to further processing, they shall inform the controller of the legal requirements prior to processing, unless the law in question prohibits this due to an important public interest.

Section 2 Obligations of the Processor

1) The Processor shall structure an in-house organisation in a manner complying with data protection requirements. The processor shall implement technical and organisational measures that meet the requirements vested within Art. 32 of the General Data Protection Regulation.

2) In executing the work, the Processor shall only use employees who have been familiarised with the relevant data protection regulations and properly obligated to maintain secrecy (Art. 28 (3)(b) and Art. 29 GDPR).

3) In Schedule 2, the Processor has documented the implementation of the technical and organisational measures needed for the specific performance of this Agreement. The Customer is familiar with these technical and organisational measures and is responsible for evaluating whether these measures offer adequate risk protection for the data to be processed.

4) The technical and organisational measures are subject to technical progress and development. The

Processor is permitted to implement adequate alternative measures, provided that the security level of these measures, as outlined in Schedule 2, is not compromised. Important changes are to be documented.

5) The Processor shall assist the Controller by appropriate technical and organisational measures, insofar as this is possible, for the fulfilment of the Controller's obligation to respond to requests for exercising the data subject's rights laid down in Chapter III GDPR. This includes responding to data subjects' inquiries concerning either the Controller's information obligation, their right of access, their right of rectification, erasure, restriction of processing, data portability, and related communication obligations of the Controller, or the right to object to automated decisions, including profiling, if the data subject asserts any such rights. Furthermore, the Processor will assist the Controller in ensuring compliance with the obligations pursuant to Articles 32 to 36, taking into account the nature of processing and the information available to the Processor.

6) Where a data subject submits a request for the exercise of his or her rights under Chapter III GDPR directly to the Processor, the Processor shall forward such request to the Controller without undue delay. The Processor shall not take any measures to fulfil data subject rights or provide any substantive information without prior documented instructions from the Controller.

7) Contact details of the Processor´s data protection officer and the internal representative are mentioned in Schedule 3

8) The Processor shall notify the Controller without undue delay and no later than 24 hours after becoming aware of any personal data breach affecting personal data processed on behalf of the Controller.

Such notification shall include all information available to the Processor in line with Article 33(3) GDPR, including:
(a) the nature of the breach, including categories and approximate numbers of data subjects and records concerned;
(b) the likely consequences of the breach;
(c) the measures taken or proposed to address and mitigate the breach.

Where not all information is available at the time of the initial notification, the Processor shall provide additional details as soon as they become available.

The Processor shall further assist the Controller, taking into account the nature of the processing, in fulfilling its obligations under Articles 33 and 34 GDPR, including communication to supervisory authorities and affected data subjects where required.

Section 3 Customer and Supervisory Authority Controls

1) If, on a case-by-case basis, it should become necessary for the Customer to inspect the technical organisational measures, such inspections will be conducted during normal working hours, without disturbance to operations, further to prior notification and allowing for an appropriate lead time. The processor's facilities may be entered as part of the audit.

2) The Processor may make an inspection contingent upon the signing of a confidentiality agreement regarding the data of other customers, and the technical and organisational measures established, if the Customer does not commission an investigator who is under a secrecy obligation for legal reasons and/or for reasons of professional law.

3) If the investigator commissioned by the Customer is in competition with the Processor, the Processor shall

have veto power.

4) If a data protection supervisory authority or another of the Customer's sovereign supervisory authorities wants to inspect the data processing, the Processor will support the Customer. The above paragraphs apply accordingly.

Section 4 Correction, Restriction, and Deletion of Data

1) The Processor may only delete or restrict the processing of the data to be processed under the terms of this Agreement if this is provided for in the Main Contract, this Agreement, or if the Customer issues a corresponding instruction. If a data subject addresses the Processor directly with a wish for deletion, this request shall be transmitted without delay to the Customer by the Processor.

2) Following termination of the Userlane Master Subscription Agreement, all personal data that is the object of this Agreement shall either be deleted or returned by the Processor, at the Customer's request, unless Union or Member State law requires storage of the personal data. Until the data is deleted or returned, the processor shall continue to ensure compliance with the clauses of this DPA.

3) Copies or duplicates of the data will not be issued without the Customer's knowledge.

Section 5 Subprocessors

1) In terms of this provision, sub-contractual relations entail those services that relate directly to the provision of the main service. This does not include ancillary services availed of by the Processor, e.g., as telecommunications services, postal/transport services, maintenance and user service, or disposal of data carriers, as well as other measures to ensure the confidentiality, availability, integrity, and capacity of the hardware and software of the data processing equipment. However, to ensure the protection and safety of the Customer's data in outsourced ancillary services as well, the Processor is bound to conclude appropriate and legally compliant contractual agreements and to implement control measures.

2) The Customer grants the Processor a general written authorisation to engage sub-processors from the list maintained at: https://docs.userlane.com/docs/subprocessors (the "Subprocessor List"). This list shall always reflect the Processor's current authorised sub-processors. All contractual provisions in the contract chain must also be imposed on the other subprocessors.

3) The Processor shall notify the Customer in writing and in advance of any intended changes to the subprocessor list, including the addition or replacement of sub-processors, at least 30 days before the change becomes effective. The processor shall provide the controller with the necessary information to enable the controller to exercise its right to object.

The Customer may object to the engagement of a new sub-processor on reasonable grounds related to data protection prior to the effective date of the change. If the Customer objects, the Processor shall not engage the proposed sub-processor for processing the Customer's data. If the Parties cannot reach a mutually acceptable solution, either Party may terminate the Main Contract with one month's written notice. In such a case, the Customer shall not be entitled to a refund of any prepaid licence fees or other charges, provided that the proposed sub-processor complies with applicable data protection laws and this DPA.

Section 6 Remuneration

Remuneration for all of the Processor's activities is not part of this Agreement but is based solely on the Main

Contract.

Section 7 Term

This Agreement shall apply in this form upon signature of the Main Contract. This Agreement shall end upon the full implementation of the measures described in Schedule 1, without requiring a notice of termination by one of the parties, or with the end of the Main Contract.

Section 8 Final provisions

1) Changes and supplements to this DPA require written form or text form. This shall also apply to a waiver of this form requirement.

2) This Agreement shall also apply if and insofar as authorities or courts deviate mutatis mutandis from a joint responsibility of the contracting parties pursuant to Art. 26 GDPR.

3) In the event of any conflict or inconsistency between the Main Contract and this Data Processing Agreement ("DPA"), the terms of this DPA shall prevail with regard to the subject matter of data protection, data security, and the processing of personal data.

4) The Data Processing Agreement (DPA) may be updated by the Processor from time to time, to the extent necessary to reflect changes in legal requirements, regulatory guidance, technical or organizational measures, or the Provider's services.

The Provider shall notify the Customer's administrative contact (Admin Contact) of any planned material changes to the DPA at least 30 days prior to the effective date, by email or via the administrative portal used by the Customer.

If the Customer does not object in writing within the notice period specified in this notice, the updated DPA shall be deemed accepted. In the event of a timely objection, the Parties shall work together in good faith to reach an appropriate solution. Until such a solution is reached, the previous version of the DPA shall remain in effect. The current version of the DPA is available at https://www.userlane.com/trust-center/

Liability
The Parties shall be liable for damages caused by processing of personal data in accordance with Article 82 GDPR. As between the Parties, liability shall be allocated in accordance with their respective responsibility for the damage.

Schedule 1: Subject Matter, Type, and Scope of Data

1. Subject Matter

Userlane provides a Software as a Service product as described in the Main Contract.

2. Data Subjects

Processor processes personal data of users of the Software. This can be

● Admin Users (persons who are entitled to manage content and configuration of Userlane) or

●End Users (persons who use the Customer Application together with Userlane's in-app assistance (content edited by Admin users) and who can be, e.g., Customer's clients, prospective clients, and/or Customer´s

employees).

3. Scope, Type, and Purpose of Data Processing

In the context of this DPA, personal data are processed by the Processor within the meaning of Art. 4 no. 2 GDPR. In particular, these include the collection, recording, organization, arrangement, storage, adaptation or modification, reading out, querying, use, disclosure by transmission, dissemination, or any other form of provisioning, matching, linking, restriction, deletion, or annihilation. Furthermore, the type and purpose of processing of personal data by the Processor are described in detail in the Main Contract. Subject matter of the processing of personal data is the following types/categories of data (list/description of data categories)

Function of processed data category	Data categories processed by Processor if data subject is an Admin User	Data categories processed by Processor if data subject is an End User
Identifier	Email address	ID Optional*: email address
Metadata for secure operation of systems	IP address, URL, browser type and version, time zone and language settings of users.	
Custom attributes	Roles & Permissions, Login information	Optional*: Attributes that are defined by Customer
Interaction data of User with Userlane	Audit log of changes made to configuration and content elements	Usage of Userlane content elements (e.g. Guide played, Announcement seen, ...)
Interaction data of User with Customer Application		Optional*: Interactions (e.g. page visits, clicks) in Customer Application Optional*: Usage of specifically defined features in Customer Application

* Optional features and data fields can be enabled or configured by the Customer

Place of Processing

The provision of the contractually agreed data processing generally takes place in a Member State of the European Union (EU) or in another Contracting State to the Agreement on the European Economic Area (EEA). The Processor is nonetheless permitted to process personal data outside the EEA in compliance with the provisions of this Agreement if he informs the Controller in advance of the place of data processing and if the requirements of Art. 44 et seq. GDPR are met. Section 5 para 2 applies accordingly.

Schedule 2: Technical and organizational measures

Processing environment and system architecture

The Processor provides its services as a Software as a Service (SaaS) solution. The processing of personal data is carried out in a cloud-based infrastructure environment.

The application is operated in a logically separated multi-tenant architecture. Customer data is processed in isolated environments to ensure separation between different customers.

The hosting and infrastructure services are provided by a cloud service provider acting as subprocessor. At the date of this Agreement, the Processor uses Microsoft Azure cloud services for hosting, storage, and related infrastructure components.

The cloud infrastructure includes, in particular:

- compute resources for application operation,
- storage systems for structured and unstructured data,
- network components for secure data transmission.

Personal data is processed exclusively within data centres located in the European Economic Area (EEA), unless otherwise agreed in accordance with this DPA and subject to appropriate safeguards under Articles 44 et seq. GDPR.

The Processor does not operate any on-premise data processing systems for the provision of the core service. All relevant production systems are hosted within the cloud infrastructure described above.

Access to production environments is restricted to authorised personnel of the Processor on a need-to-know basis and is protected by appropriate authentication and authorisation mechanisms.

The Processor implements logical separation, access controls, and encryption measures to ensure confidentiality, integrity, availability, and resilience of processing systems and services in accordance with Article 32 GDPR.

I. Physical Access Controls

Unauthorised persons must be denied physical access to data processing equipment with which personal data are processed or used.

Securing the company premises - demarcation:

The company premises / business premises are demarcated from the public area by:
● Office in a larger building complex

● Lockable door

Access control system: The company utilizes a centrally managed access control system.

Access control system - Lockable rooms: All rooms in the company where access to personal data is possible are lockable.

Access control system - visitor registration: In the company, the presence of visitors is registered via: Visitor passes

Access control system - technical means: The access control system is based on the following technical means: Chip card

Access control system - administration: The access control system is managed as follows: Electronically

II. Logical Access Control

Unauthorised persons shall be denied access to data processing equipment with which personal data are processed or used.

Access to Personal Data in Visitor Areas: It is ensured that personal data in the company is not freely accessible in visitor areas.

Password Manager:

A password manager is used in the company.

The following password manager is used: Dashlane

Password Manager - Access Control:
The used password manager offers sufficient access control and encrypted storage.

Portable Terminal Devices - Access Control:
Terminal devices in the company have access control (password, PIN, pattern, etc.).

Single Sign-On Procedure:
The company uses a single sign-on procedure.

Storage of Sensitive Information:
Employees were instructed to lock personal data up when leaving their workplace in the company (so-called Clean-Desk-Policy).

Two-Factor-Authentication:
Two-factor authentication is used in the company.

Two-factor Authentication for Single Sign-On:
Two-factor authentication is used for logging in with single sign-on within the company.

III. Data Access Control

It must be ensured that persons authorised to use a data processing system can only access the data in accordance with the designated access permissions.

Allocation of Access Authorisations:

The assignment of access authorisations in the company is based on the functions of the authorised users.

Departing Persons - Withdrawal of Authorisations:

All access authorizations and access rights of a departing person are promptly blocked/deleted.

IV. Data Carriers Control

Data carriers should not be read, copied, changed or removed without authorisation.

Data Carrier Management

Access Protection: Data carriers in need of protection and collected for disposal are protected against unauthorised access in the company.

Data Carrier Management - Inventory List:

Inventories for the following data carriers are kept in the company:

- Laptops
- Cell phones
- Tablets

Workplace - Sealable Containers:

Lockable containers are available at every workplace to securely store documents and data carriers within the company.

V. Communication Control

It must be possible to determine and establish where personal data can be transmitted by data transmission equipment.

Connection to the Telecommunications Provider:
The following method is used to connect to the telecommunications provider: Regular DSL/fibre optic connection

VI. Transmission Control

It is necessary to prevent unauthorised reading, copying, modification or deletion of data during the transfer of personal data or during the transport of data carriers.

Data Transmission - Data Carriers:
No data carriers with personal data are transmitted

Encryption of Transmission:

Data is encrypted during transmission using the following procedures/protocols:

● SSL/TLS

● WPA2

VII. Input control

It must be ensured that it can be subsequently checked and determined whether and by whom personal data have been entered into data processing systems, changed or removed.

Logging - Processing of Personal Data:
Processing of personal data in the company gets logged.

VIII. User Control

It must be ensured that data processing systems cannot be used by unauthorised persons using data transmission devices.

Administrators - Consistent Accounts:

Administrator accounts are used at the following level in the company:

● Database

● Application

Administrators - Special Accounts:
Special administrator accounts are used in the company.

Blocking Access to Hardware Interfaces:
Access to the hardware interfaces of relevant terminal devices is blocked in the company. Departing

Persons - Reclaiming Company-Owned Property:
All company-owned property containing personal data is reclaimed from a departing person.

Employee Training:
The following measures are taken to make employees aware of the importance of data protection and to comply with them in accordance with the requirements:

● Commitment of employees to the rules of conduct

● Obligation of employees to maintain data secrecy

IX. Service Provider Control

It must be ensured that personal data processed under contract is only processed according to the client's instructions.

External Service Provider - Remote Maintenance:
The company does not provide remote maintenance services.

External Service Providers:
The company does not work with external service providers.

X. Storage Control

Unauthorised entry into storage systems, as well as unauthorised access to, modification, or deletion of stored personal data shall be prevented.

Password Protection - Password List:
No unencrypted password list is kept.

Professional Disposal of Personal Data:
Employees in the company are required to dispose of personal data properly.

XI. Availability control

It must be ensured that personal data is available at all times and is protected against accidental destruction or loss.

Archiving Concept:

An archiving concept is defined that regulates how and for how long documents are archived. Archiving Concept - Legal Retention Obligation:
There is a legal obligation to store archived documents.

XII. Reliability

It must be ensured that personal data is secured against accidental loss or destruction. Critical Systems

Redundancy:
Critical systems and the infrastructure are designed redundantly.

Penetration Tests:
To test the resilience of the IT systems, the company conducts regular penetration tests that simulate high loads on its IT systems.

Penetration Tests - Improvement Measures:
Based on past penetration tests, recommended improvement measures have been implemented within the company.

Penetration Tests - Regularity:
In order to test the resilience of the IT systems, regular penetration tests on IT systems are carried out that simulate high loads in the company.

XIII. Data Recovery

It is necessary to ensure that personal data can be quickly restored in the event of a physical or technical incident.

Backups: Backups in the company are performed by cloud provider

XIV. Separability

It has to be ensured that data collected for different purposes can be processed separately.

IT Security - Particularly Sensitive Personal data:
A dedicated and separate network is used for particularly sensitive categories of personal data.

Segregation of Workplaces:

Workplaces where particularly sensitive personal data is processed are physically separated from other workplaces.

XV. Operating system

Unauthorised individuals must be prevented from gaining access to operating systems. Operating system

Authorisation Concept for Test and Development Environments:

An authorisation concept in test and development environments has been implemented in the company.

Password Protection - Initial Passwords:
Initial passwords must be changed at the first login in the company.

Password Protection - Password Complexity:
There is a default for password complexity in the company.

Password Protection - Password Length:
There is a default for the password length in the company.
The password has a length of at least 8 characters.

Password Protection - User Account:
Each user account of the operating system in the company is protected by a password.

XVI. Applications

It has to be prevented, that unauthorised persons gain access to any applications.

Software - Separation between Environments:
Productive, test and development environments including the data bases are separated from each other in the company.

Schedule 3: Data Protection Contact Details

Data Protection Coordinator

Name	Kritika Chopra
Email	dpo@userlane.com

Data Protection Officer

Company	DataCo GmbH Represented by the managing directors Thomas Regier & Kivanc Semen Sandstraße 33 80335 Munich Germany
Phone	+49 89 740045840
Email	datenschutz@dataguard.de

Userlane Master Subscription Agreement / Terms of Service

Last Modified on 11.03.2026

1. Preamble

Userlane GmbH, registered with the commercial register at the local court of Munich, Germany, under no. HRB 226565 (“Userlane”) is a software manufacturer providing a software serving as a platform for user adoption and interactive support (the “Software”).

Customer wishes to use the Software.

Userlane will issue a binding quotation or accept Customer´s binding quotation only if Customer is a company or a person acting in the exercise of his or its trade, business or profession.

This Agreement will be concluded as follows:

1.1 If the Agreement is concluded by using an Order Form, the provision of the Order Form shall be Userlane´s binding quotation to conclude a contract with the Customer according to the provisions of this Agreement. Customer is entitled but not obliged to accept this quotation. Acceptance will be declared by Customer´s signature on the Order Form.

1.2 If the Agreement is concluded online, Customer´s click on a button with the description “Buy now” or a description with a corresponding meaning shall be Customer´s binding quotation to conclude a contract with Userlane according to the provisions of this Agreement. Userlane is entitled but not obliged to accept this quotation. Acceptance will be declared by email.

This Master Subscription Agreement governs Customer’s acquisition and usage terms of Userlane services. If Customer registers for free services, the applicable provisions of this Agreement will also govern those free services.

Parties therefore agree as follows:

2. Definitions

“Add-ons” are additional features as defined in the Order Form that can be licensed in addition to a Plan to extend the scope of the Agreement.

“Admin User" means a person who is entitled to have access to the Userlane dashboard and create content with the Software for the customer application and who can be (i) the Customer himself if Customer is a person, or (ii) if Customer is a company Customer's employees and/or Customer's contractors working on behalf of Customer, and only in the course of providing services to Customer and who are authorized by Customer to use the Software in accordance with this Agreement.

“Agreement“ shall mean this Master Service Agreement including the Order Form and the Userlane Technology Product Description.

“Affiliate” shall mean any company or business entity controlled by, controlling or under common control with a Party to this Agreement. For this purpose, “control” shall mean the direct or indirect ownership of more than

50% (fifty percent) of the voting stock of a company, or in the absence of ownership of more than 50% (fifty percent) of the voting stock of that company, the power, directly or indirectly, to direct or cause the direction of the management and policies of such company. For the sake of clarity holding, parent, sister and daughter companies are regarded to be Affiliates.

“Beta Services” shall mean applications, features, functions or other technology that are not part of the Software as described in the Userlane Technology Product Description and has been provided to Customer but is not generally available and has been designated by Userlane as pilot, beta, limited release, developer preview or by description of a similar import.

“Confidential Information” shall mean any and all information disclosed by or for one Party

(the “Disclosing Party”) to the other Party (the “Receiving Party”), whether marked “confidential” or not, whether in oral, visual, electronic, written or any other form including, but not limited to, financial data, trade secrets, prices, know-how, strategies, inventions, ideas, formulas, processes, test data, procedures, formulations and specifications, and all notes, compilations, summaries, memoranda or other documents prepared by the Receiving Party which contain, reflect or are otherwise derived from the aforementioned information.

“Content” shall mean any content provided by the Customer to the Customer’s Users via the Userlane Software including but not limited to dynamic or static website elements, text, media, hyperlinks or forms.

“Digital Assets” are elements in digital form, including applications, for which the Customer has a right of use, irrespective of the contractual relationship with Userlane.

“Effective Date” means the date when this Agreement commences.

“Exportable Data” means all input and output data, including metadata, generated directly or indirectly by the Customer's use of Userlane’s Software in connection with the respective Agreement, including all Digital Assets of the Customer, with the exception of assets or data of Userlane or third parties that are protected by intellectual property rights, constitute a trade secret or relate to the security and integrity of the Exportable Data, the Customer, a third party or Userlane and the transfer of which would violate, endanger or disclose them.

“Free Services” means a period when Customer is entitled to use the Software with a limited feature set without being obliged to pay a License Fee.

“License Fee” means the Fee Customer must pay for the Software License according to this Agreement.

“Order Form” means an ordering document provided by Userlane to Customer that includes Userlane´s binding quotation to conclude a contract with the Customer according to the provisions of this Agreement.

“Plan” shall mean a set of features and/or service levels as further described in the Userlane Technology Product Description and/or the Service Level Agreement.

“Software“ shall mean the software product defined in the Userlane Technology Product Description with the features that are agreed in this Agreement.

“Software License” shall mean Customer´s right to use the Software according to the Agreement.

“User” shall mean the end user of the customer application which may include Customer’s employees or customers.

“Userlane Technology Product Description” shall mean a document where Userlane describes the features & compatibility requirements of the Software.

3. Userlane´s Obligations

1. Userlane shall provide Customer access to use the Software to be integrated into the customer application by a browser extension or a code snippet.

2. Userlane shall grant to Customer the Software License as defined in the Section “Software License”.

3. Userlane shall provide Support as defined in the Section “Support and Service Level”.

4. Software License

1. As of the Effective Date, Userlane grants to Customer a non-exclusive, non-transferable, worldwide, irrevocable (during the term) right to use the Software with the limitations as agreed in the applicable Plan or Order Form.

2. The Software License is only valid for one customer application. A separate Software License is required, e.g., if a new code snippet needs to be implemented into another application. This is for example if customer´s application is a SaaS application and Customer wants to use the Software also in a separate intranet platform or a separate training portal.

3. If the Customer reaches the limits of the conditions detailed in the applicable Plan or the Order Form and covered by the Software License, Userlane may work with Customer to seek to reduce Customer’s usage so that it conforms to these limits. If notwithstanding Userlane’s efforts, Customer is unable or unwilling to abide by a contractual usage limit, Customer will execute an Order Form for additional quantities of the applicable Services or Content promptly upon Userlane’s request and pay any invoice for excess usage in accordance with the “License Fees, Invoicing and Payment” section below.

4. The Software License is sublicensable only to Customer´s Affiliates. If customer application is a Software provided by the Customer to Customer´s own customers, then the Customer is entitled to grant access to the Software to the amount of users of the customer application as agreed in the Order Form. For clarification: This does not affect the category of persons who can be designated as Admin Users according to Section 2.

5. Customer shall refrain from either copying or modifying the Software in any way and shall not alter, enhance, adapt, reverse-compile, de-compile or compile, reverse-engineer, disassemble or translate the Software or any part thereof or otherwise create any derivative work based thereon. Reverse-engineering solely for purposes of obtaining such information as is necessary to achieve interoperability with independently created software shall be permitted.

5. Support and Service Levels

1. Customer and Admin Users have access to an online knowledge base provided by Userlane. The knowledge base serves as a handbook and user manual.

2. Userlane shall provide support as agreed in the Agreement according to the provisions of a Service Level Agreement (Annex 3) that forms part of this Agreement.

6. Customer Obligations

1. The Customer shall only use the Software for the customer application.

2. Customer shall always provide true information to Userlane during the registration process and contract term and shall inform Userlane if given information changes.

3. Customer shall keep access keys and/or the browser plugin and/or the code snippet secret and confidential and shall not provide them to third parties other than Admin Users or Affiliates. The browser plugin can also be provided to Users.

4. In the event of any doubt as to the correctness of the use of the Software License, Userlane is entitled to inspect Customer's trading books by a third party (e.g., lawyer, auditor, certified accountant or sworn accountant) to verify the correctness and completeness of the provided information and the use of the Software License. Such an inspection will take place during normal business hours. If there is no concrete suspicion for willful misconduct of the Customer, Userlane will inform Customer. If there are deviations to the provided information to Userlane by Customer, the resulting costs will be refunded to Userlane. Userlane will use the data and information obtained through the inspection only to enforce the claims arising from its intellectual property.

5. Userlane will indemnify Customer and hold Customer harmless for any third-party claims asserted against the Customer due to the infringement of rights of third parties as a result of the contractual use of the Software for which Userlane may be liable, Customer shall inform Userlane immediately. Parties will coordinate the defense of such claims in close coordination, whereby Userlane will take the lead as far as possible and permissible. The Customer will support Userlane. If Userlane does not provide instructions despite reminder within a reasonable period of time, the Customer is entitled to treat the asserted claims against him at his discretion without further consulting Userlane. If Userlane defends an unjustified claim according to this Section 6 (5) Customer shall indemnify Userlane by payment of 50% of Userlane´s necessary costs of legal defense.

7. License Fees, Invoicing and Payment

1. License Fee. Customer shall pay the License Fee as agreed in this Agreement in advance for the initial subscription term and (if applicable) any renewal subscription term(s). Customer shall ensure that the full amount can be received on Userlane´s bank account without being reduced by any applicable transfer payment fee. The License Fee during any renewal term will increase by an amount of 5% compared to the applicable pricing in the prior term.

2. Data porting and erasure pursuant to Section 13 shall be provided free of charge. All additional services in the context of support for termination and switching in accordance with Section 13 shall be invoiced by Userlane on a time and material basis. Userlane’s hourly service rate applicable at the time the Agreement is concluded shall apply, in the absence of an agreement an hourly rate of EUR 150,00 plus VAT shall apply. The remuneration shall be due upon performance of the service and shall be invoiced after performance.

3. Credit Card Payment. If Customer provides credit card information or other bank details to Userlane, Customer authorizes Userlane to charge such credit card or bank account for all services listed in the Order Form or Plan for the initial subscription term and any renewal subscription term(s) as outlined in the section “Term and Termination” below. Such charges shall be made in advance, either annually or in accordance with any different billing frequency stated in the applicable Plan or Order Form.

4. Payments by Method other than Credit Card. If the Order Form specifies that payment will be by a method other than a credit card, Userlane will invoice Customer in advance in accordance with the payment terms specified in the Order Form.

5. Due Date. Fees are due to payment within 30 days upon issuing of a proper invoice by Userlane.

6. Overdue Charges. If any invoiced amount is not received by Userlane by the due date, then, without limiting Userlane's rights or remedies, those charges may accrue late interest at the annual rate of nine percentage points above the base rate of the European Central Bank.

7. Suspension of Service and Acceleration. If any charge owing by Customer under this Agreement is overdue, Userlane may, without limiting its other rights and remedies, accelerate Customer's unpaid fee obligations under such agreements so that all such obligations become immediately due and payable, and suspend services until such amounts are paid in full, provided that Userlane will give Customer at least 14 days' prior notice that its account is overdue.

8. Invoicing. Userlane will send invoices per email only, if not agreed otherwise.

9. Net Prices. All prices mentioned on the website and in the Order Form are net prices and do not include any applicable value added tax.

8. Intellectual Property / Copyright / Trademarks / References

1. Reservation of Rights. Subject to the limited rights expressly granted under this Agreement, Userlane reserves all of its right, title and interest in and to the Software, including all of the related intellectual property rights. No rights are granted to Customer under this Agreement other than as expressly set forth herein.

2. License by Customer to Userlane. Customer grants Userlane a worldwide license to host, copy, use, transfer, transmit, and display the Content created by Customer and/or Admin Users as far as this is required for the performance of Userlane´s obligations according to this Agreement. This license includes but is not limited to the copyright in the written works serving as the information displayed in the Content as well as the copyright in the logical structure of the Content or a collection of the Content as well as any statistical data.

3. License by Customer to Use Feedback. Customer grants to Userlane a worldwide, perpetual, irrevocable, royalty-free license to use and incorporate into its services any suggestion, enhancement request, recommendation, correction or other feedback provided by Customer or Admin Users relating to the operation of Userlane´s Software.

9. General Confidentiality Obligations

1. Except to the extent expressly authorized by this Agreement or otherwise agreed in writing, Parties agree that each Party (the "Receiving Party") receiving any Confidential Information of the other Party (the "Disclosing Party") hereunder shall keep such Confidential Information confidential and shall not publish or otherwise disclose or use such Confidential Information for any purpose other than as provided for in this Agreement. The foregoing provision does not apply to Confidential Information that the Receiving Party can establish:

    1. was already known by the Receiving Party (other than under an obligation of confidentiality), at the time of disclosure by the Disclosing Party and such Receiving

Party has documentary evidence to that effect;

2. was disclosed to that Party, other than under an obligation of confidentiality, by a third party who had no obligation to the Disclosing Party not to disclose such information to others; or

3. was generally available to the public or otherwise part of the public domain at the time of its disclosure to the Receiving Party;

4. became generally available to the public or otherwise part of the public domain

after its disclosure or development, as the case may be, and other than through any act or omission of a Party in breach of this confidentiality obligation;

5. was independently discovered or developed by or on behalf of the Receiving Party without the use of the Confidential Information belonging to the other Party and the Receiving Party has documentary evidence to that effect.

2. Disclosure of Confidential Information. Notwithstanding the preceding paragraph, each Party may disclose Confidential Information belonging to the other Party to the extent such disclosure is reasonably necessary to:

    1. prosecute or defend litigation;

    2. exercise rights hereunder provided such disclosure is covered by terms of

confidentiality similar to those set forth herein and

3. comply with applicable governmental laws and regulations.

3. In the event that a Party shall deem it necessary to disclose pursuant to this clause

Confidential Information belonging to the other Party, the Party disclosing Confidential Information to a third party shall to the extent possible give reasonable advance notice of such disclosure to the other Party and take reasonable measures to ensure confidential treatment of such information.

10. Professional Services

1. Userlane will also provide services related to the Software, e.g., customizing, training or consultancy services ("Professional Services") after appropriate assignment.

2. The assignment with Professional Services can also be done by phone or email.

3. Professional Services are provided for a fee and are invoiced according to the applicable hourly rate.

4. The provider is entitled to engage subcontractors for Professional Services.

5. If the customer commissions training, trainings will be performed via video conference if not explicitly agreed otherwise.

6. Travel expenses of the provider will be reimbursed as follows:

- Travel expenses will be reimbursed in proven amounts, regardless of the choice of means of travel, but not more than (a) for journeys by car of EUR 0.39 per kilometer driven, (b) for journeys by train at the cost

of a second-class train journey (c) for flights only for the cheapest flight in economy class.

- Accommodation costs will be refunded in a corresponding amount, regardless of the hotel category chosen, up to a maximum of each in the amount of EUR 250.00 per night.

- Travel times are charged at 50% of the hourly rate for Professional Services.

11. Subscription Term and Termination

1. Subscriptions. Unless otherwise provided in the applicable Order Form or in the Userlane

Technology Product Description, (a) the purchased Software and access to Content are purchased as subscriptions for the term stated in the applicable Order Form or in the applicable online purchasing portal, (b) any added subscriptions including but not limited to Add-ons will terminate on the same date as the underlying subscriptions. Customer agrees that its purchases are not contingent on the delivery of any future functionality or features, or dependent on any oral or written public comments made by Userlane regarding future functionality or features.

2. Term of Agreement. This Agreement commences with one Party´s acceptance of other Party´s binding quotation and continues for the agreed period. Except as otherwise specified, the term will automatically renew for additional periods equal to the expiring term unless either Party gives the other Party notice of non-renewal at least 90 days before the end of the relevant term.

3. Termination for Cause. Either Party shall be entitled to terminate this Agreement for good cause, if other Party commits a material breach of a contractual obligation under this Agreement, and, in case such a breach is capable of remedy and the remedy is just and reasonable for both Parties, fails to remedy it within 14 days of receipt of a notice from the other Party of such breach and that Party's intention to exercise its rights under this clause.

4. Add-ons. Parties can agree at any time to extend the Agreement to additional Add-ons. If not agreed otherwise, the term of an Add-on commences upon one Party´s acceptance of other Party´s binding quotation and further on depends on the term of the Agreement.

12. Reversibility

1. In case of termination, Userlane will, upon Customer's request, provide Customer with a download link to download Content in an open format (e.g., xml or csv). If Customer does not request for a download link until the end of the Agreement, Userlane is not obliged to keep Content after the end of the Agreement.

2. The download link will work for 60 days upon Userlane´s provision. After this download period, Userlane is not obliged to keep Content.

3. Userlane will not charge additional fees for the provision of a download link.

13. Support during Provider Switching

1. Notwithstanding Section 11 and 12, the Agreement shall end in accordance with the provisions of this Section, if the Customer requests a Switching Process in accordance with the requirements of this Section, at the end of the subsequent Switching Phase (hereinafter: Switching Phase). Userlane shall inform the Customer of the end of the Agreement.

2. The Switching Process includes switching to the Customer's own infrastructure, switching to a data processing service offered by a different provider of data processing services or requesting erasure of all Exportable Data and Digital Assets in connection with the Agreement with Userlane (hereinafter: Switching Process).

3. To initiate the Switching Phase, the Customer must notify Userlane at least in text form no less than two (2) months prior to the desired start date of the Switching Phase (hereinafter: Switching Request). The Switching Phase begins immediately after the expiry of this period.

4. The Switching Request must clearly state that a switch in accordance with the provisions of this Section is intended.

5. The Switching Request should indicate whether the Customer intends to switch to another provider, to its own infrastructure, or requests the erasure of its data. This declaration can be submitted after the Switching Phase has commenced.

6. In the event of a switch to another provider, the Customer shall be obligated to provide Userlane with all information about the new provider necessary to execute the Switching Process no later than after the start of the Switching Phase.

7. The Switching Phase is generally thirty (30) days.

8. If Userlane ascertains that the Switching Phase of thirty (30) days is not sufficient because the switch is technically not feasible within this period, Userlane may inform the Customer of this within fourteen (14) working days of the Switching Request, stating the reasons, and extend the Switching Phase by an appropriate period of up to seven (7) months. If the Customer ascertains that the Switching Phase is not sufficient, the Customer may extend the period once by a reasonable period.

9. During the Switching Phase, Userlane shall provide the following services to the Customer and/ or a third party authorized by the Customer:

1. Userlane shall port all Exportable Data and Digital Assets at the Customer’s request to the Customer to an ICT infrastructure at the Customer's premises or to a third party without undue delay and in no event later than after the end of the Switching Phase.

2. Userlane provides information on the transferable data categories of Exportable Data and structures, open interfaces for porting, the available porting and switching methods and file formats on the following website.

3. Userlane shall provide reasonable support during the switch and act with due care to maintain the continuity of business operations during the switch and to continue the provision of the contractual functions or Services until the switch is completed.

4. Userlane is not aware of any risks to the uninterrupted provision of the Services or information about the Software that would make the switch very complicated or costly or impossible without significant intervention in the data, Digital Assets or service architecture.

5. Userlane shall ensure a high level of data security during the switch.

6. Upon request, Userlane shall reasonably support the Customer in its exit strategy if the Customer informs Userlane at least in text form at an early stage about this strategy and the services to be provided by Userlane for this purpose.

7. If agreed between the Parties, Userlane shall comply with applicable open interoperability specifications and harmonized standards for the interoperability of data processing services in order to ensure compatibility with services of other providers.

10. The Switching Phase ends upon expiry of the period specified in paragraph 7 of this Section or upon actual completion of the switch.

11. If the Customer requests the erasure of the data, the switch shall be deemed completed immediately after the start of the Switching Phase and the Switching Phase shall be deemed to end.

12. The Customer shall owe the agreed remuneration for use in accordance with Section 7. If the Agreement is terminated prior to the expiry of an agreed term according to the provisions of this Section, the claim to remuneration agreed for this term shall remain unaffected.

13. Otherwise, no early termination penalties shall be imposed in the event of premature termination of the Agreement in accordance with the provisions of this Section.

14. Userlane shall make the Exportable Data available for a maximum of thirty (30) days after the end of the Agreement and shall erase all Exportable Data of the Customer and data relating to the Customer still in its possession, unless Userlane and the Customer have mutually agreed on a different period, a switch in accordance with this Section has not yet been successfully completed or Userlane is legally obliged to store and retain the data.

15. The mandatory information pursuant to Art. 28 DA can be found on the following website.

14. Data Protection

1. Both Parties will comply with applicable data protection laws.

2. Userlane will maintain appropriate administrative, physical and technical safeguards for the protection of the security, confidentiality, and integrity of Customer Data as described in the Userlane Technology Product Description. Those safeguards will include but will not be limited to measures designed to prevent unauthorized access to or disclosure of Customer Data (other than by Customer). The terms of the data processing addendum in Annex 3 (“DPA”) are hereby incorporated by reference and shall apply to the extent Customer Data includes personal data, as defined in the DPA.

15. Warranties and Liability

1. The Parties agree that Userlane is the sole manufacturer. Userlane warrants that the Software does not contain third-party applications that prevent Customer from using the Software. Userlane warrants that the Software works with the browsers and the IT-environment as defined in the Userlane Technology Product Description. Userlane is not liable for the interoperability with the customer application.

2. If not explicitly provided otherwise in this Agreement, Userlane is liable in the cases of (a) damages sustained by the Customer from loss of life, bodily injury or damage to health due to a violation of duty on the part of Userlane, (b) damages sustained by the Customer in the context of the German Product Liability Law, a guarantee assumed by Userlane or deceit on the part of Userlane, (c) damages sustained by the Customer through intent or gross negligence on the part of Userlane and/or (d) damages sustained by the Customer through violation by Userlane of a duty which must be fulfilled, if the contract is to be executed at all, and on the fulfillment of which customers regularly and rightfully depend (cardinal duty).

3. Userlane ´s liability is unlimited in the cases of Section 15 para 2, letters (a), (b) and/or (c). In all other cases of Section 15 para 2, liability is limited to an amount of 1.000.000 EUR.

4. Userlane's liability is excluded in all claims not covered by para 2, regardless of their legal grounds.

5. The preceding liability regulations also apply to the personal liability of the organs, employees and vicarious agents of Userlane.

16. Free Services, Beta-Services

1. Free Services. Userlane may make Free Services available to Customer. The use of Free Services is subject to the terms and conditions of this Agreement. In the event of a conflict between this section and any other portion of this Agreement, this section shall control. Free Services are provided to Customer without charge up to certain limits as described in the Userlane Technology Product Description. Usage over these limits requires Customer's purchase of additional resources or services. Customer agrees that Userlane, in its sole discretion and for any or no reason, may terminate Customer's access to the Free Services or any part thereof. Customer agrees that any termination of Customer's access to the Free Services may be without prior notice, and Customer agrees that Userlane will not be liable to

Customer or any third party for such termination. Customer is solely responsible for exporting

Customer Data from the Free Services before termination of Customer's access to the Free Services for any reason, provided that, if Userlane terminates Customer's account, except as required by law, Userlane will provide Customer a reasonable opportunity to retrieve its Customer Data.

2. During any period when Customer is using the Software without being obliged to pay a License Fee including but not limited to a Free Services Period or a Beta Service Period Userlane is only liable for damages sustained by the Customer through intent or gross negligence on the part of Userlane. Userlane is not obliged to provide support for Free Services or Beta Services.

17. Other Provisions

1. There are no oral side agreements. All changes, supplements, and terminations of this Agreement, including this clause, must be made in written form to take effect, whereby "written form" is understood to include digital/electronic form (text form).

2. This Agreement will be sent to Customer by email and will be stored by Userlane for the means of Userlane´s proper bookkeeping.

3. The laws of the Federal Republic of Germany shall apply. This includes European Law and International Treaties with countries such as the United States as far as they have immediate legal effect on the contractual relationship of Parties. The provisions of the UN Convention on Contracts for the International Sale of Goods do not apply.

4. The exclusive place of jurisdiction is Munich, Germany.

5. If individual provisions of this contract prove to be ineffective or unenforceable in whole or in part or become ineffective or unenforceable due to changes in the law after the contract was concluded, the remaining contractual provisions or the effectiveness of the contract as a whole shall remain unaffected

thereby. Each such ineffective or unenforceable provision shall be replaced by an effective and enforceable provision which comes closest to the meaning and purpose of the original invalid provision.

Annexes

Annex 1: Product Documentation (see https://www.userlane.com/product)

Annex 2: Service Level Agreements (see https://www.userlane.com/sla)

Annex 3: Data Processing Addendum (see https://www.userlane.com/dpa)

EU Data Act

Last Modified on 11.03.2026

Mandatory Public Information pursuant to Art. 28 DA

Our services are subject to German law.
To prevent international governmental access to and transfer of non-personal data where such access or transfer would conflict with Union law or German law, we implement appropriate technical, organizational, and contractual measures. These include: primarily hosting data within the EU, encrypting data (e.g., during transmission), technical access restrictions such as identity and access management, password managers, single sign-on with 2FA, authorization management, monitoring and logging of access attempts, regular penetration testing, employee training, internal policies, and the review and contractual obligation of subcontractors.

Mandatory Information for Customers pursuant to Art. 25 and Art. 26 Data Act

1. Upon request, in the event of a switch pursuant to Art. 25 DA, the customer may export the following categories of data and structures from the provider:

- HEART analytics data (e.g. survey results, engagement metrics)
- Content analytics data
- Guide texts and translations
- User list

2. The provider transmits the data using the following switching and transfer methods, open interfaces, and in the following file formats:

- Download link via the Userlane Portal (CSV)
- API-based export (JSON)

3. The following data categories of exportable data are excluded from the exportable data to be transmitted, as they are specific to the internal functioning of the provider's software or involve the risk of infringement, endangerment, or disclosure of the provider's or a third party's trade secrets, intellectual property, or the security and integrity of the exportable data, the customer, a third party, or the provider:

- Internal system algorithms and proprietary AI models
- Raw user event data

Frequently Asked Questions (FAQ)

Last Modified on 21.04.2026

This article includes the Frequently Asked Questions (FAQ), we receive from our customers.

Account

How can I change my Payment Details?

Please reach out to your Customer Value Manager.

Access to Userlane

I am having troubles logging in, what can I do?

- Check whether your credentials are correct.
- Clear your cache and cookies.
- Try logging in again.

Should you still face any issues logging in, please contact the Customer Success Team.

I have forgotten my password, what can I do?

You can reset it via this link here to initiate a Password Reset. You will receive an email to the mail address you entered if it is connected to a Userlane Account. Please also check your spam folder.

Should you still face any issues logging in, please contact the Customer Success Team.

Why is Userlane not showing / the editor is not visible?

This is the most common support question we receive. Work through these checks in order as described in our Userlane is not showing - Troubleshooting article.

What is the difference between global settings and the setting under our "application drop-down"?

The Global settings apply to all the applications that use Userlane and are listed in the Application dropdown. The settings in the Application dropdown apply to a single Application only. For more details check out this article.

Why can I not see my Guides in the assistant once I have created them?

Per default, a newly created Guide is saved under draft and with the status private. You will first have to publish it in order for it to appear in the assistant.

What do I need the Portal for when I am creating Guides?

On the Portal, you can manage your Guides, e.g. publish them, change order, move to a different chapter, set the languages, customize Global settings, e.g. texts, the position of the avatar, and designs. Additionally, you can use the Portal for Announcements, analytics, inviting team members and users.

Will Userlane run on staging and production environments?

We can configure Userlane so it runs either on staging or production or on both by allowing Userlane to be shown only on specific pages or to specific users. For testing the Guides before going live you can use the options described here.

How do I make content available in only staging, not production environments?

You can allow Userlane to show only on the Staging URL or only to users who have access to the staging environment. This is usually needed for testing Guides before going live. You can read more about testing Userlane in this article. About Page/ URL segmentation you can read more here. About user segmentation check out this article.

How do I move content from one environment to the other?

You can "unlock" the content you tested on staging for the production environment by changing the segments that were applied to Userlane and/or by rolling Userlane out to Production or you can move it to another account if applicable.

The invitation email for a new user did not arrive

Invitation emails are sent from noreply@userlane.com. Corporate email filters frequently block or quarantine messages from unknown senders. Steps to resolve:

- Ask the user to check their spam or junk folder.
- Ask your IT team to allow noreply@userlane.com as a safe sender.
- If your organisation uses a strict allowlist, add userlane.com as a permitted sending domain.

Once added to the allow list, use the Portal to resend the invitation.

Content creation

What are real-life examples of skip conditions?

Check out this article to learn more about it.

Can I go back to an older version of a Guide?

No, we recommend you be mindful of making changes to your Guides. Better make a copy of a Guide when you need to make alterations.

Is there an autosave for the Guides?

As of now, there is no autosave option available.

When do I use left clicks and when right clicks?

You can learn more about the step types here.

Can two people edit a Guide at the same time?

No, by having more than one person working on the Guide you risk overwriting each others' changes.

What should I test if a guide is not working?

Please learn more about this here.

How do I properly record drop-downs?

You can learn more about this here.

How can I make the selection in a drop-down, not for one but for all elements?

You can either do this by repositioning the field or adjusting the code selector. You can learn more about this here.

My tooltip is behind a page element or in the wrong position

Tooltips can be obscured by page elements that have a high CSS z-index value, or can appear offset if the target element uses unusual positioning. Please review our recommendations in the Tooltips article.

Why is my segment not working?

Segment issues fall into three distinct categories, each with a different fix:

1. Attribute case sensitivity

Userlane user attributes are case-sensitive. If your application passes the attribute role="Admin" but your segment filters for role="admin", the segment will not match. Check that the attribute values in the Portal exactly match what your application sends.

2. Bootstrap timing

If user attributes are passed to Userlane after the snippet has already initialised, the segment may evaluate before the attributes are available. Work with your developer to ensure attributes are passed before or at the moment the Userlane snippet boots.

3. Missing Moderator permission for the Segments page

Moderator-role users cannot view or edit segments unless explicitly granted access to the Segments page. An Admin must enable this permission under Team → Roles.

Testing Userlane

How can we publish Guides to end-users for them to test?

Please check our article on that topic here.

I only saw an announcement once, what can I do?

Active Announcements are shown to the users either as Popups (only once per User) or are accessible via the Assistant menu later in the Announcement Section (the bell icon). If you want to test an Announcement popup, you will need to log in with a User who has not seen it yet.

Can we reset a user to start from scratch?

We cannot reset a user and have their interaction erased. The way to go would be to create a new user (if needed for testing).

Analytics

Why is HEART not loading or showing no data?

Two causes account for the majority of HEART loading failures:

1. HEART is not activated for this property

HEART analytics must be enabled per property. Go to your application settings in the Portal and confirm that HEART is switched on. If it has just been activated, allow 24–48 hours for initial data to populate.

2. Segment size is too small — timeout

HEART queries time out when the selected segment has very few users, or when the date range is very narrow. Try broadening the segment or extending the date range. If the issue persists with a large segment, contact support.

Security & Architecture

Do you offer SOC 2?

Userlane is ISO 27001 Certified. SOC 2 is in the planning phase.

Why do I see a 401 notification?

There are two distinct types of 401 error in Userlane, and they have very different implications:

Harmless Portal 401 (no action needed)

If a user is not logged in to the Userlane Portal, a 401 message may appear in the browser console. This is expected behaviour and does not affect end-user experience or Guide playback.

Critical SSO 401 (requires immediate action)

During an active SSO (Seamless Rollout / Browser Extension) session, a 401 error indicates an expired or misconfigured authentication token. This breaks Userlane for affected end users — the Assistant will not load. Signs of a critical SSO 401:

- The Browser Extension shows an empty box or prompts login repeatedly (hourly loop).
- End users report that Userlane has stopped working since a recent SSO configuration change.
- The 401 appears alongside an SSO-related URL in the network tab, not just a Portal URL.

If you are seeing a critical SSO 401, contact support immediately and include a screenshot of the network request and the error detail.

Is Userlane impacting my performance?

Userlane should not impact the performance of your application. Should you still be concerned or notice any different behaviour, please do not hesitate to contact us for further investigation.

Branding

Can I have the "technology by Userlane" removed?

Please reach out to your Customer Value Manager.

Userlane Technology

Can I also use it on mobile, e.g. Android?

Userlane Technology is delivered in “Responsive Design”o Userlane also works on common mobile devices as long as the OS and browser versions are up to date. The creation of the Guides rather happens though on the actual online version of the application.

Can Userlane run on HTTP pages?

The underlying app needs to run with an encrypted protocol (HTTPS) to ensure a secure and encrypted communication.

Is Userlane accessible?

The Userlane Suite is WCAG 2.1 certified accessible. You can find more information here.

Why is App Discovery not finding any applications?

App Discovery has two technical limitations that are not always obvious:

1. App Discovery requires the Browser Extension, not the Snippet

If Userlane is implemented via the JavaScript Snippet only, App Discovery will not detect any applications. App Discovery is a Browser Extension feature. Users must have the Userlane Browser Extension installed for App Discovery to work.

2. Only applications on the Userlane SaaS tracking list are detected

App Discovery tracks a predefined list of SaaS applications. If your users primarily use internally-built tools or SaaS products not on the list, App Discovery will return no results. Contact support to ask whether your applications are included.

Why can't the AI Assistant find my Guide content?

The AI Assistant does not read the full text of every step in your Guides. It searches only the following fields:

- Guide Title
- Intro Slide Title
- Intro Slide content

If the key information or task description is placed in step 3 or later, the AI Assistant will not find it. To optimise your content for the AI Assistant:

- Put a clear, descriptive summary of the Guide's purpose in the Intro Slide content.

- Use specific, searchable keywords in the Guide Title and Intro Slide Title.

See How to optimise content for the Userlane AI Assistant for full guidance.

Browser Extension and SSO

Why does the Browser Extension keep popping up or showing an empty box?

Three causes account for most cases:

- SSO token expiry — the extension prompts re-authentication each time the token expires, which can feel like an hourly loop. Your SSO administrator should extend the token lifetime or enable silent token refresh.
- Stuck or corrupted cookies — a stale session cookie causes the extension to show an empty box. The user should sign out from the extension, clear cookies for the Userlane domain, and restart the browser.
- Multiple browser profiles — if a user has the extension installed in more than one browser profile, session state can conflict between profiles and trigger repeated popups. The user should ensure the extension is active in only one profile at a time.

For detailed diagnostics and additional scenarios, see the Seamless Rollout Troubleshooting article.

Questions and Troubleshooting

Who can I reach out to when I have questions or need support?

In the footer of your Userlane Account, you can find the option to contact the support team with the Userlane Contact Form. You can create a support ticket there or you can reach out directly to your Customer Value Manager via email.

What if Userlane is experiencing a downtime?

You can follow our system status here: https://status.userlane.com/ Subscribe for any updates.

Release Note - App Analytics URL exclusions (BETA)

Last Modified on 29.12.2025

21 June 2022

App Analytics URL exclusions (Beta)

What is it:
Userlane cares about privacy. If you want to use App Analytics, but worry because your app has sensitive pages (or for example, you just want to exclude internal staging from app tracking), you now have the possibility to exclude certain parts of the application from the advanced app tracking.

To exclude a page from app tracking you can:

- Just paste a full URL or a path and the underlying events will not be sent to us when users are on this page
- If you have a variable part of the path, you can use a wildcard * (instead of pasting all the link variables). URLs can only have the wildcards at the beginning (e.g. ***.google.com** will exclude both **test.google.com** or **instance.google.com**) and paths could have them anywhere (e.g. /test/* will exclude from tracking /test/123 and /test/456). This logic is similar to the one we have on the App URLs part.

 Userlane events about guides and announcements are still being tracked on these pages, this is **only for the App Analytics tracking.** That means we do not track underlying app activity from these pages (clicks, navigation events, etc).

How to exclude a page:
Exclude pages by entering a complete URL (e.g. **fruits.com**), a path (/apple/), or a combination of both. Note that all subpages of the pages matching your pattern will automatically be excluded as well.
You can also use wildcards to exclude multiple pages with the desired pattern in two ways:

- For the subdomain of the URL host (e.g. ***.fruits.com** will exclude both **apple.fruits.com** and **pear.fruits.com**).
- In the URL path (e.g. **/fruit/*/apple** will exclude from tracking **/fruit/123/apple** and **/fruit/456/apple**).

More in-depth about how to use this asterisk:

- you can block different subdomains with an asterisk *
- for example ***.test.com** will block **cats.test.com** and **dogs.test.com**
- **cats.test.com/123** will also be blocked
- all the children all the time
- you can block with asterisk part of the URL
- **test.com/123/cats** will be blocked by **test.com/*/cats**
- **test.com/456/cats** will also be blocked
- Small improvement: You can only asterisk part of the path **/cats/search=***
- that will block **/cats/search=cat-food** or **/cats/search=dog-food**
- so if you have cats/tuna it will not be blocked
- or just go to the search and have a link like /cats/search then it will not be blocked

Please note that:

- **/apple/** and **/apple** are the same
- you cannot block the parent and not the children, for example, if /fruits/ is blocked then /fruits/apple cannot be unblocked

If you have specified a path, it will also block its children, for example:

- **/passwords/** is blocked
- It will also block **/passwords/3121222**
- HTTP or HTTPS is not going to be compared, they block the same thing

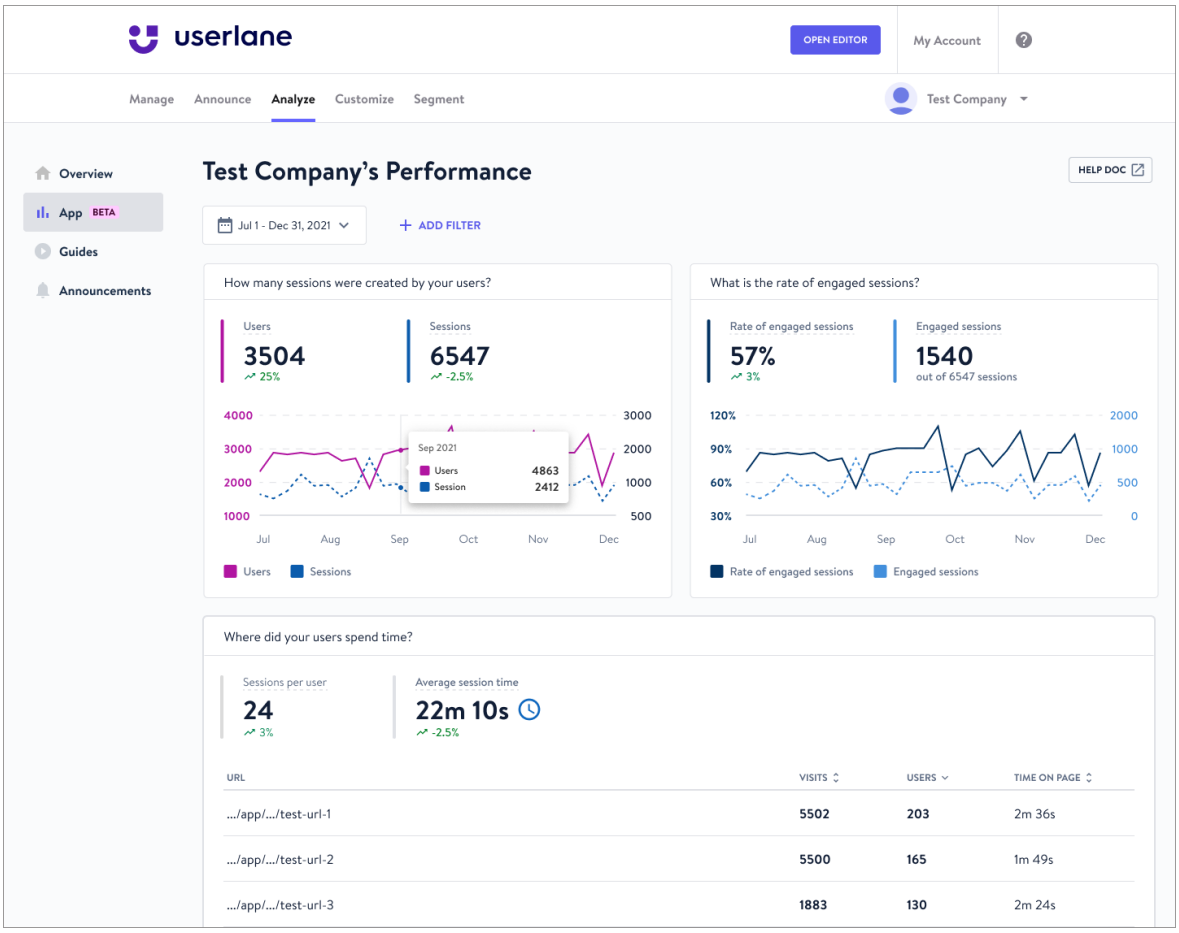
Release note - App analytics

Last Modified on 29.12.2025

xx October 2022

What's new

Now under your Analyze page, you would be able to see details on your application usage with **Userlane App analytics** and not only an overview of your Guides and Announcements performance.



Userlane's App analytics provides a holistic overview of your application, helping you to understand the level of engagement that users have with your underlying applications. The reports provide you with the insights you need to help you inform and validate your decisions.

With Userlane's App analytics, you will get reports on your **users**, **sessions**, and **time** spent within your application. You will be able to see valuable information on user engagement and application usage to decide accordingly. For more details, check out this article.

Userlane Roadmap

Last Modified on 29.12.2025

In order to compete in an ever-changing landscape, you need to constantly innovate and adapt to your software users' needs, and so do we.

At Userlane, we believe in sharing our projects and giving you the chance to provide valuable input in our Product Roadmap.

What is on it

Our Roadmap offers an overview of:

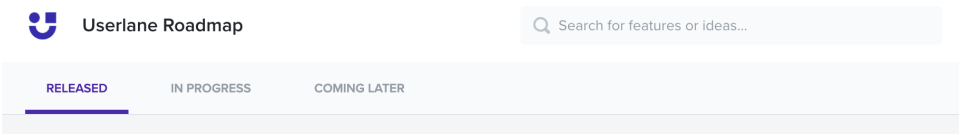
- Released features
- High-priority topics coming up
- The direction we're heading

You additionally have the option to

- submit own ideas
- indicate which topics matter most to you

Where to find it

See our Roadmap here.



Become a member of our Customer Research Community!

As a member of the community you

- actively participate in the design of new functionalities
- get early access to our newest features
- share your feedback
- help us to better tailor product updates to your needs prior to release.

Join now here.

Improvements and Fixes - January 2026

Last Modified on 11.03.2026

Improvements

Assistant

- We improved the AI Assistant by adding additional event parameters, including language classification, to improve analytics and tracking of user interactions.
- We updated the AI Assistant to use the customer's avatar for a more personalized and consistent experience.

Other

- We completed backend authentication improvements to finalize the auth-py implementation, improving security and stability across services.

Fixes

Portal

- We fixed an issue where user segments were not working as expected for certain customers.
- We fixed an issue where Guide lists were not loading correctly in Content Analytics for some customers.
- We fixed an issue where CSV downloads were not possible when the list was filtered by name.
- We fixed an issue where segment analysis was not working correctly for a specific user property.

Editor

- We fixed an issue where the Editor would crash when interacting with Tasks.
- We fixed an issue where elements could not be recorded in the Editor without performing a hard refresh of the page.
- We fixed an issue where the step selector frame would shift position when used inside an iFrame.
- We fixed an issue where adding a "+" character would break Specific Value steps.
- We fixed incorrect text in the AI Assistant interface.

Assistant

- We fixed an issue where content and authentication popups were not displaying correctly for some customers.
- We fixed an issue where disabling a URL in the Portal did not correctly prevent Userlane from injecting on that URL.

Other

- We fixed an issue where additional users were incorrectly created following a user migration, resulting in duplicate or incorrect user records.
- We fixed an issue where the identify endpoint was sending the new public ID as an integer instead of a string, which could affect user identification in certain integrations.

Improvements and Fixes - February 2026

Last Modified on 11.03.2026

Improvements

Editor

- We improved the keyword search functionality to deliver more accurate and relevant results when searching for content in the Editor.
- We made an improvement so that looped Tasks now include a cooldown period after completion, preventing duplicate events from being sent repeatedly.
- We removed the Alert column from the Tasks and Tags views in the Editor to reduce visual clutter and simplify the interface.

Fixes

Portal

- We fixed an issue where Managers were unable to access the Editor when API authentication was enabled for their account.
- We fixed an issue where company settings could not be updated in the Portal.
- We fixed an issue where Moderators with access to a specific property were unable to access Portal pages as expected.
- We fixed an issue where Moderators were unable to access the Segments page.
- We fixed an issue where Moderators were unable to download all survey results.
- We fixed a minor display issue on the Guide Analytics page list.
- We fixed an issue where segment creation and validation were failing when a filter value was set to zero.

Editor

- We fixed an issue where the Editor would crash when starting a Guide Preview for a language that had not been detected.
- We fixed an issue where the title input field in the Editor was broken and could not be edited as expected.
- We fixed an issue where Userlane would disappear after canceling a recording and refreshing the page.
- We fixed multiple issues related to auto-translation: translations were failing or being overwritten with incorrect language versions for some customers.

Assistant

- We fixed an issue where the Assistant was opening unexpectedly on clicks in the underlying application.
- We fixed an issue where images in the Assistant were not loading for customers on the US server.
- We fixed an issue where Tooltips were not all appearing on a page when navigating to it.
- We fixed an issue where content creators needed to add multiple user IDs and perform a hard refresh before Tooltips for a specific segment became visible.
- We fixed an issue where the AI Assistant was opening the Guides menu instead of returning to the conversational chat after a Guide was exited before completion.
- We fixed an issue where the Assistant was not showing on the Userlane Portal for some customers.
- We fixed an issue where user attributes were not being listed in the bootstrap as expected.
- We fixed an issue where the left-click automation action was not working correctly for some customer applications.

- We fixed issues related to region settings not being correctly applied when switching between supported regions, ensuring the correct default region is used.

Other

- We fixed multiple backend stability issues, including errors related to user authentication session handling, foreign key constraint violations, and internal server errors that were impacting reliability.
- We fixed an issue where removing a company Manager was returning a broken response.
- We fixed an issue with user verification logic to ensure the process completes correctly.
- We fixed an issue where JWT-based access to user invitation endpoints was being incorrectly blocked.
- We fixed an issue where segments were intermittently returning a 409 conflict error.

Improvements and Fixes - March 2026

Last Modified on 09.04.2026

Improvements

Editor

- We corrected the alignment of the Refine text button in the Editor for a more polished and consistent interface.

AI Assistant

- We upgraded the AI models powering our AI functionality to improve response quality and ensure continued support ahead of the previous model's retirement.
- We made improvements to the underlying search service architecture to increase performance and reliability.

Other

- We improved SSO error handling in production to provide cleaner, less verbose error messages for easier troubleshooting.
- We updated the browser extension options page to run directly within the extension for improved compatibility and version consistency.

Fixes

Portal

- We fixed an issue where the Announcement list view was not displaying Announcements in the correct order.
- We fixed an issue where manager user emails were incorrectly appearing as identifiers in the Company Users section after migration to the new user model.

Editor

- We fixed an issue where Guides and Announcements could not be saved due to a 409 conflict error.
- We fixed an issue where the Editor would disappear when reselecting an element in certain areas of a customer application.

Assistant

- We fixed an issue where the Assistant and Editor were intermittently not loading for some customers using the snippet and browser extension concurrently.
- We fixed an issue where Tooltips were not displayed or appeared at incorrect positions on certain customer applications.
- We fixed an issue where Validators were not working correctly on applications with complex HTML input field structures.

Other

- We fixed an issue where SSO authentication was returning 401 errors for some customers using specific identity providers.
- We fixed a CORS policy issue that was blocking certain requests between the Assistant and backend services.

Release Note - Expanded Analytics API (Guide progress, Tags, NPS and Survey API)

Last Modified on 13.05.2026

What is new

We've expanded our Analytics API export functionality with four new endpoints, so you can pull more Userlane data into your BI tool (Power BI, Tableau, Looker, etc.) and combine it with data you collect in other systems.

The four new endpoints are:

- **Tags API:** per-user, per-day interaction counts on tagged elements in your application. Use it to measure feature adoption, identify power users, and spot adoption gaps.
- **NPS API:** individual Net Promoter Score responses (score, optional comment, timestamp, user ID). Use it to track sentiment trends and identify promoters and detractors.
- **Surveys API:** individual responses to custom in-app surveys (score, optional comment, timestamp, user ID). Use it to measure feature-level satisfaction and gather post-task feedback.
- **Guide Progress API:** per-user completion state for a specific guide, plus aggregate completion statistics.

Combined with the existing HEART, Guides, and Announcements APIs, you can now build a complete picture of how users engage with your application and how they feel about it.

How to find it

The new endpoints are documented in our developer reference:

- Getting started with the Tags API
- Getting started with the NPS API
- Getting started with the Surveys API
- Getting started with the Guide Progress API

For setup guidance in the Help Center and to see examples of what our endpoints return, see:

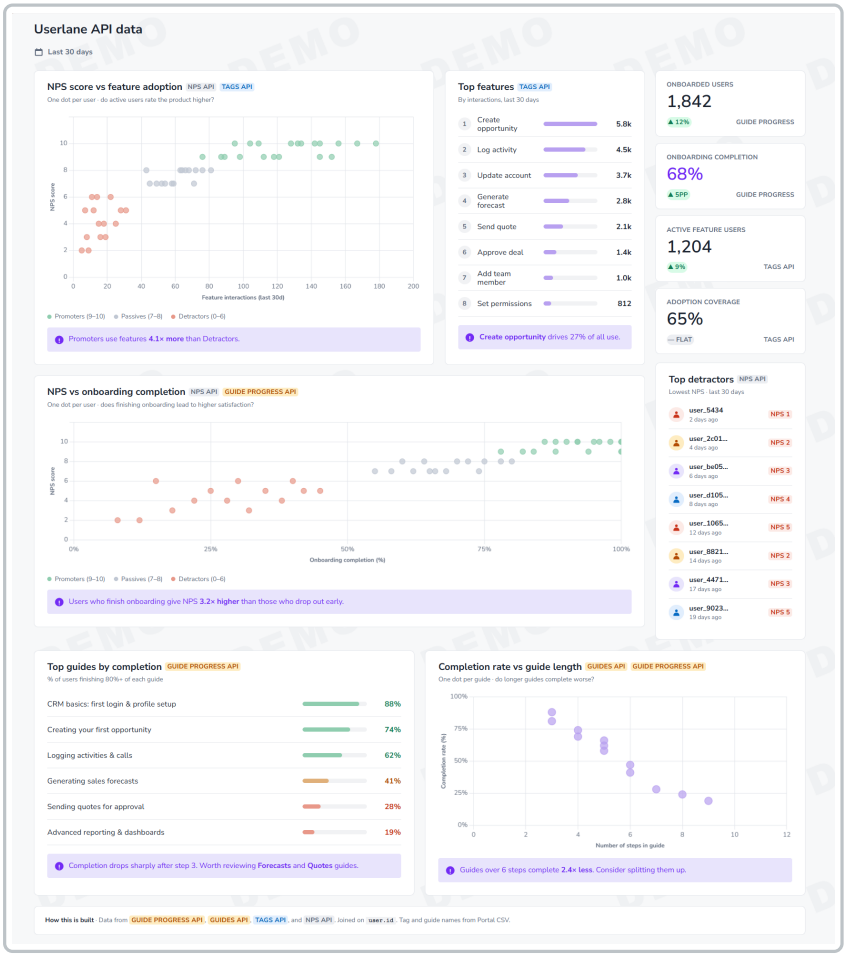
- Export HEART, NPS, Surveys, and Tags data via API
- Export Guides, Guide progress and Announcement data via API

What you can build with it

By combining these APIs with your own user data (role, region, department, licence type), you can build segment-level dashboards that answer questions like:

- Which features are most used by which departments?
- Are promoters using a different set of features than detractors?
- Who are my biggest promoters?
- Who was using X feature the most?
- Is satisfaction improving in segments where adoption is growing?

BI Dashboard example you can build using the API export data:



Userlane provides the engagement and sentiment data; segment attributes come from your own user system, joined on the user ID we return in every response.

ℹ All endpoints return a user ID. To enrich the data with user attributes such as role or region, join the responses with your own user system using the `applicationUserId` field, or use our Enduser API for Userlane-side attributes.

Release Note - Expanded Analytics API with Tasks API

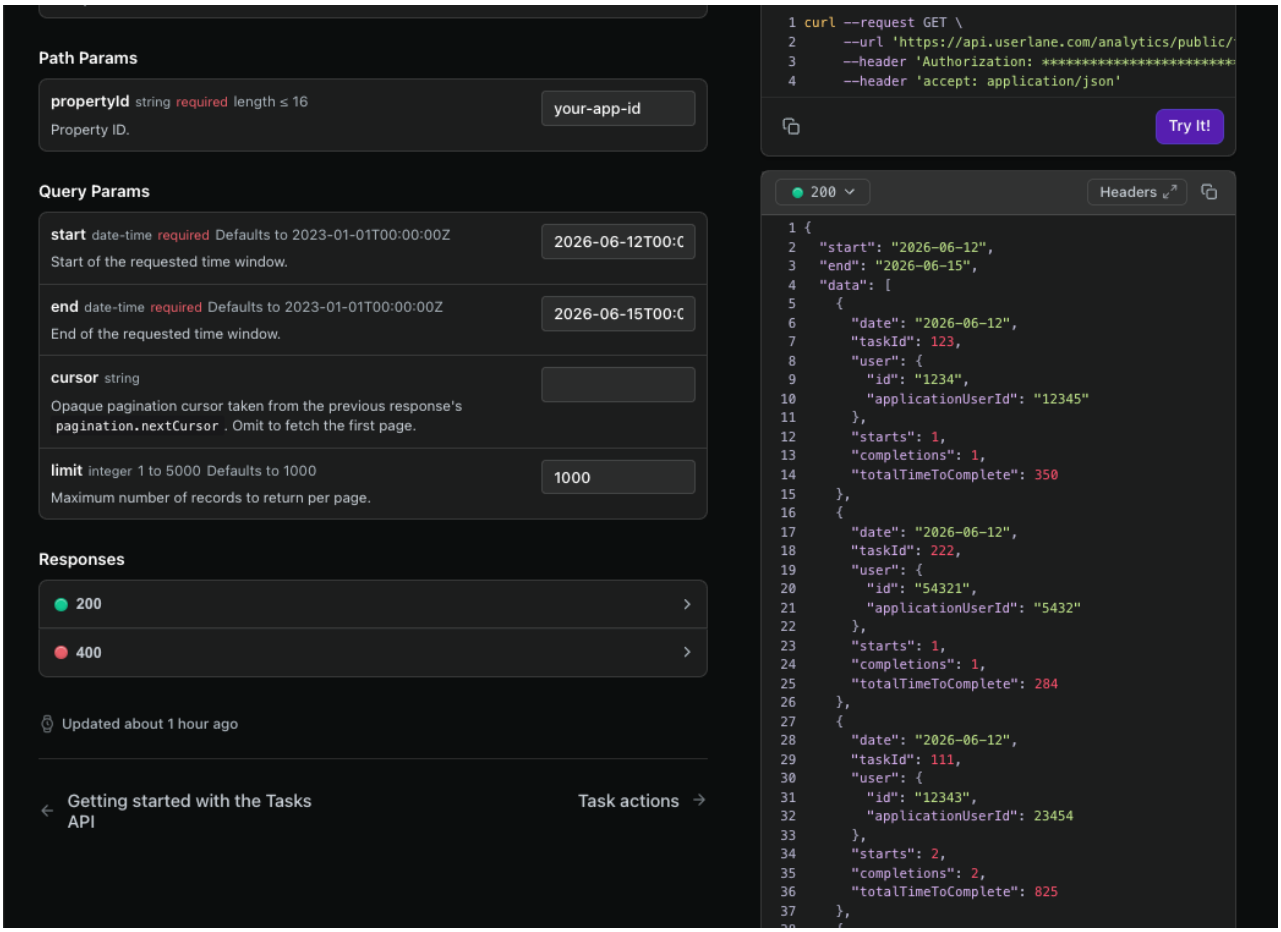
Last Modified on 22.06.2026

What is new

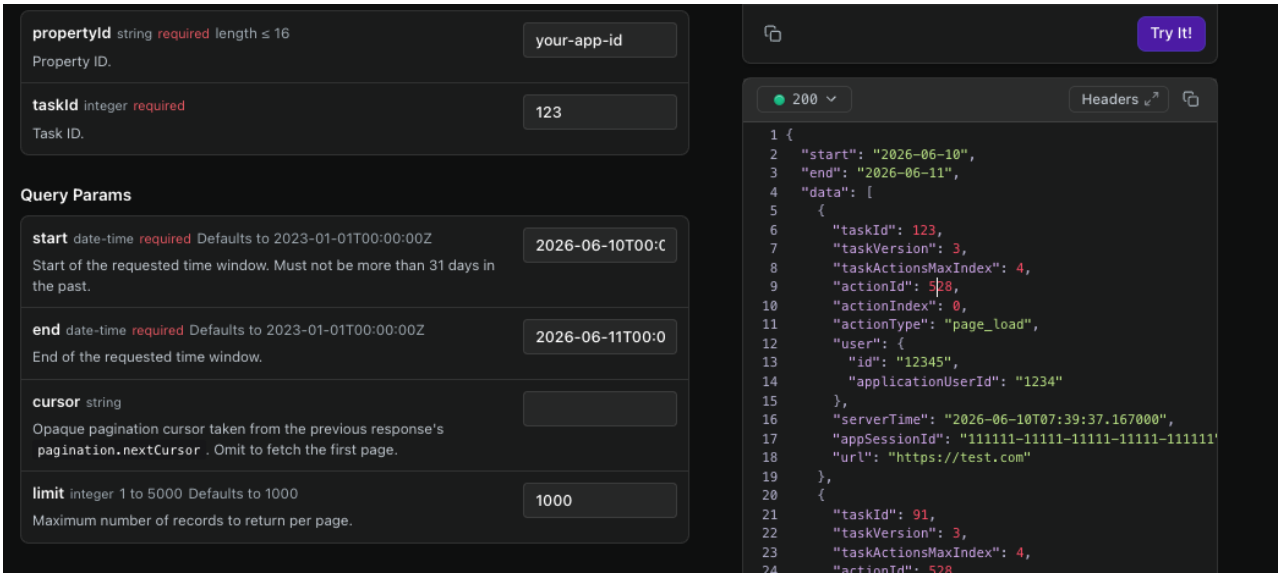
We've added the Tasks API to our Analytics API export functionality, so you can pull task adoption data into your BI tool (Power BI, Tableau, Looker, etc.) and combine it with data you collect in other systems.

The Tasks API has two endpoints, serving two levels of detail:

- Aggregated Tasks API: per-user, per-day starts, completions, and time to complete, across all tasks in a property. Use it to track completion rates over time and spot tasks with high drop-off.

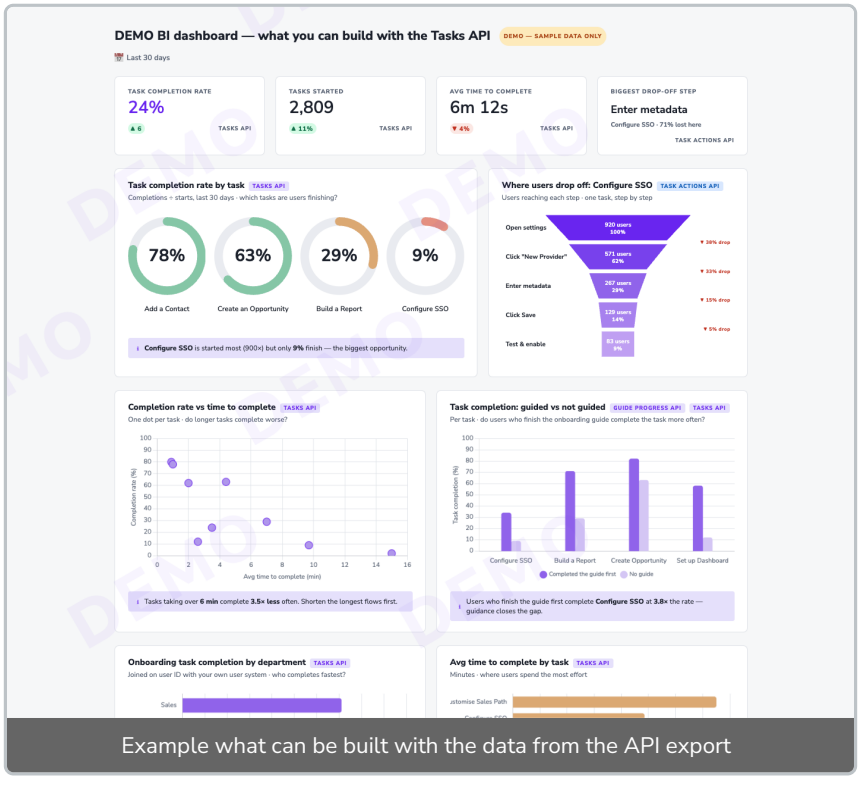


- Task Actions API: the raw, step-by-step action event stream for a single task. Use it to see exactly which step within a task users complete or abandon, for funnel and friction analysis.



The typical workflow is to start with the aggregated endpoint to find the tasks worth investigating, then use the actions endpoint to understand where users drop off inside a specific task.

Combined with the existing HEART, NPS, Surveys, Tags, Guides, Guide Progress, and Announcements APIs, you now have a complete picture of how users move through and complete key tasks in your application.



Example what can be built with the data from the API export

How to find it

The new endpoints are documented in our developer reference:

- Getting started with the Tasks API

For setup guidance in the Help Center and to see examples of what the endpoints return, see:

- Export HEART, NPS, Surveys, and Tags data via API

What you can build with it

By combining the Tasks API with your own user data (role, region, department, licence type), you can build segment-level dashboards that answer questions like:

- Which tasks have the highest drop-off, and at which step?
- Are certain departments or roles completing onboarding tasks faster than others?
- Did a task redesign actually improve completion rates?
- How long does it take users to complete key setup tasks, and is that improving over time?
- Which tasks are started often but rarely finished?

ℹ Both endpoints return a user ID. To enrich the data with user attributes such as role or region, join the responses with your own user system using the `applicationUserId` field, or use our Enduser API for Userlane-side attributes. Task and action names are not included in the response; export them from the Userlane Portal and join on `taskId` and `actionId`.

ℹ Task data is available from 8 July onwards. Each request can cover a date range of up to 30 days; you'll get back exactly the range you ask for, within that limit.

Improvements and Fixes - December

Last Modified on 29.01.2026

Improvements

Portal

- We've updated some double-axis analytics charts for better readability and clearer comparisons.
- We've improved Task Trends by implementing new simpler signals on the Tasks page.
- We've refined the donut chart styling with updated strokes and a smaller heading for a cleaner look.

Assistant

- We updated the expiration status for Task sessions.

Fixes

Portal

- We've fixed company user sorting so users are now listed in the correct order.
- We've removed the misleading tooltip for created users to reduce visual noise and keep the UI cleaner.

Editor

- We fixed an issue where the Editor was not sending the correct name to the Portal for Task Actions.
- We fixed an issue where a customer could not create new Chapters in the Editor.

Assistant

- We fixed an issue where the Tooltip icon would detach from the selected element on tables when CSS anchoring was in use.

Other

- We fixed an issue where Userlane caused a certain page on the underlying application to crash.

Improvements and Fixes - November

Last Modified on 29.01.2026

Improvements

Portal

- The Task detail page is now available and shows overall interaction with actions in a bar view. You can see engagement per task and how many times users interacted with each individual action.
- We've updated the "With errors" filter on the Analytics Overview page to work as a toggle, making filtering faster and easier.
- We've also added a Status filter in most Content Analytics pages, so you can narrow down results more quickly (e.g. filter only Announcements in the draft status).
- App Discovery page now includes *Healthcare* as a category to better support industry-specific app discovery and reporting.

Editor

- We added an improvement to how Validators are stored in the backend when deleted by a customer.
- We added a button in the code selector to help content creators fix small issues quickly and easily.

Assistant

- We added an improvement so that the Assistant does not close on clicks of the underlying application when a knowledge base article is open and being viewed.

Other

- We added performance improvements to our selector algorithm to maintain high quality code and performance.
- We added support for inline CSS nonce to our .js snippet for customers who wish to implement it.

Fixes

Portal

- We've restricted company moderator permissions, so moderators can no longer delete or edit company users.
- We've fixed an issue on the User Activities page by correcting the date display for migrated users.

Editor

- We fixed an issue where auto-translation for Tooltips was not functioning as expected.
- We fixed an issue where the Editor would crash with clicks on specific areas of the Editor.

Assistant

- We fixed an issue where Validators present at the bottom of the users viewport would not render

properly and instead bounce above and below the selected input field.

- We fixed an issue where Input Actions for Tasks were sending events on every keystroke instead of once per total input.
- We fixed an issue where popups in the underlying app were closing when the user clicked on a Userlane element while navigating a Guide.
- We fixed an issue where the search in the Assistant was not returning results.

Improvements and Fixes - October

Last Modified on 19.12.2025

Improvements

Portal

- **Portal Tables:** Introduced a new, clearer table header structure.
- **Messages:** Added filtering by Message status, so you can easily view only active or draft messages.
- **App Discovery:** Discovering additional 90 apps.
- **Segment Analysis:** Filters are now remembered in your browser and no longer reset on refresh or navigation change.
- **Company Users Page:** Simplified user statuses to *No status*, *Pending invitation*, and *Created* (formerly *Imported*).
- **User Details Page:** Improved layout clarity. Standard attributes are now easier to find and take up less space.
- **Tags (Attributes):** User Tags now behave like standard user attributes, with additional UI refinements and backend improvements.
- **App Overview (Validators):** Validator view metrics are now available in Content Analytics and link directly to the Validator page.
- **Portfolio Overview:**
  - Updated financial formatting (e.g. **$1 M** instead of **1M$**).
  - Removed empty table states, app lists are always visible.
- **AI Settings:** Added a success toast when saving a segment.

Editor

- Improved how Task actions are triggered and sent for Click actions on dropdown menus.
- Added support for `appendToTarget` in Guide steps to improve stability on certain flyout menus.

Fixes

Portal

- Removed bugs and duplicate entries in App Discovery.
- Fixed incorrect user counts in Segment user lists.
- Corrected copy on the *Create a message* page.

- Fixed the *Invite all* action in User Import.
- Resolved foreign user parsing issues for attached company users.
- Cleaned up legacy styling.
- Fixed auto-translation copy issues.
- Fixed validation and segment creation when filter values equal `0`.

Editor

- Fixed an issue where Page Load actions did not trigger correctly when testing Tasks.
- Fixed an issue where the *Everyone* segment option was not selectable for Validators.
- Fixed alignment issues in Guide steps.

Improvements and Fixes - September

Last Modified on 14.10.2025

Improvements

Portal

- Filters for segments and date ranges are now preserved as query parameters, maintaining the chosen state after refresh.
- The content analytics section on the App Overview page now links directly to the relevant content pages for easier navigation and consistency across analytics views:
  - Guides now link to the Guide Analytics page.
  - Hints open the Tooltip Analytics page, automatically filtered to show only Hints.
  - Beacons open the Tooltip Analytics page, filtered to show only Beacons.
  - Guides with Errors (if any exist) link to the Guide Analytics page, with the table pre-filtered to display only guides containing errors.
  - Announcement Analytics now link to the Announcements Analytics page.
- Improved currency display for financial numbers on Portfolio Overview, now shown in a more readable format.
- Updated content cards in the Portal App Overview to align with the standardized UI card component.
- Fixed several mislabeled elements on the Overview page for consistency.
- Improved various UI texts for clarity and consistency.
- Enhanced usability of analytics filters, making it easier to unselect options.
- Removed unnecessary back buttons from the “Heart to Happiness” empty-state modal.

Editor

- We improved how Validators work on certain applications where the <input> or <textarea> element is the child of a parent element.

Fixes

Portal

- Added a missing toast success message after CSV upload on the Portfolio Overview page to confirm successful completion.
- Corrected the logic for the “With Errors” filter to properly display affected items.
- Fixed an issue where an empty overlay appeared even when an NPS survey was published. Survey analytics now display correctly even if only an NPS survey exists and no standard Surveys are published.
- Resolved an issue where segment filters on Portal Overview only applied after changing pages; now they apply immediately.

Editor

- We fixed an issue that caused recording elements in cross-origin iFrames to be slow and problematic.
- We fixed an issue where Tooltips with additional selector parameters (subSelector, parentNum) were not able to be saved.

Assistant

- We fixed an issue where Tooltips and Tags for some customers were not functioning as expected.
- We fixed an issue where Tooltips created in a cross-origin Iframe would not refresh as expected.

- We improved how Validators perform when created on form fields in an iFrame.

Improvements and Fixes - August

Last Modified on 03.09.2025

Improvements

Portal

- Added API authentication token - customers can now use a secret key with each API request for extra security
- Added a filter to show all Guides with errors in the Guides list (Guide Analytics page).
- Introduced daily announcement/survey reminders - useful for urgent updates.
- Apps in the side navigation are now sorted alphabetically, with full names shown on hover.
- Minor UI and design system improvements. For example, improvement on the stacked vertical bar chart in the analytics (added gap between bars).

Assistant

- We made an improvement to how the position of Tooltip icons are calculated such that there is no longer a delay on user scroll.

Fixes

Portal

- We fixed an issue where some AI based functionality in the Portal did not load due to a backend service not restarting properly.
- Fixed incorrect texts in the Announcement builder.
- Fixed a bug where Announcement pins sometimes caused a 409 error.

Editor

- We fixed multiple issues where Tooltips could not be saved after manual changes were made to the code selector for a given Tooltip.

Assistant

- We fixed an issue where the AI Assistant chat was visible in the classic Assistant for Managers after closing the Editor.

Improvements and Fixes - July

Last Modified on 18.08.2025

Improvements

Portal

- We updated segment table sorting, so that lists are now filtered by last updated by default.
- We removed the App discovery section from the Applications page to avoid metrics duplication.
- We updated the UI of the card design for main metrics in HEART.
- We deprecated the additional hint (arrow) from settings and customize options.
- We made minor enhancements to the new Application Overview page.

Assistant

- We removed the additional hint (arrow) functionality from Guide steps.

Fixes

Portal

- Fixed routing for Guides so the navigation re-click opens the correct chapter instead of unsorted Guides.
- Fixed comments-only filter for surveys and NPS.
- Fixed missing Survey scores in NPS and Standard survey details pages.
- Fixed Announcement link issue to allow URLs containing commas.
- Fixed incorrect toast message position in Edge browser.

Editor

- We fixed an issue where the Pause Recording mode was not reset when exiting and then re-entering the recording mode.
- We fixed an issue where attempting to publish a Validator before saving it would not actually publish the Validator.
- We fixed an issue where Vimeo videos with a hash query were not able to be properly added to Guide steps.

Assistant

- We fixed an issue where clicks on the underlying app would cause the Userlane Assistant to open.

Improvements and Fixes - June

Last Modified on 25.07.2025

Improvements

Portal

- Updated media modal for a better visual experience on the Welcome slide's Portal page.
- Adjusted color logic for the Heart scores: high scores now display in green instead of yellow to better reflect performance.

Editor

- We improved how segments are sorted in the Editor dropdowns when applying them to content so that they are now sorted alphabetically.
- We improved the authentication flow for how content types are displayed to Managers in the Editor.

AI Assistant

- We improved how the AI Assistant catches and displays errors from OpenAI when the offensive content filter has been triggered.
- We improved how the AI Assistant retrieves documents when a knowledge base integration exists to increase performance.

Other

- Implemented a couple of security improvements
- We improved how the Userlane Editor and Player works with cross-origin Iframes by adding support for nested cross-origin iFrames.

Fixes

Portal

- Reactivated the toggle to enable knowledge base search — previously missing due to outdated logic.
- Fixed an issue preventing CSV uploads on Portfolio Overview for US customers with large app volumes.

AI Assistant

- We fixed an issue where the OpenAI offensive content filter was being triggered for every user question.
- We fixed an issue where clicking on the AI Assistant but not the close button would close the AI Assistant.

Other

- Fixed the issue fix CORS policies that was blocking Assistant from showing up for customers using iFrames

- We fixed an issue where disabling URLs in the Portal did not disable Userlane from injecting on those URLs.
- We fixed an issue where self-hosting snippets stopped working due to a related update.
- We fixed an issue where search requests were being timed out to due a limitation in the backend service.
- We fixed an issue where steps in Guide with attached videos or images would flicker if the attachment was too large or the browser zoom was set to 150% zoom or higher.
- We fixed an issue where one element of the Userlane Assistant was not accessibility compliant.

Improvements and Fixes - May

Last Modified on 18.08.2025

Improvements

Portal

- We added a new privacy policy link to the Portal footer and login page, tailored for managers using the Portal and Editor.
- We added new discoverable apps in the App discovery, including several in the AI category.
- We improved the filtering logic in App Discovery and “AI app” is now displayed as a tag rather than a category

AI Assistant

- We updated the AI Assistant to respond to user questions with its general knowledge when no Userlane content can be found for the user question.
- We improved when and how Announcements are returned as responses to the user question.
- We updated and improved the search mechanism for the AI Assistant to make it faster, more accurate, and better able to respond to user questions.
- We added formatting to general knowledge responses in the Userlane AI Assistant.
- We improved how the AI Assistant remembers previous messages in an individual chat session.
- We updated and improved the prompts that the AI Assistant agent uses to find the correct answer to the user question.

Other

- We updated particular libraries to mitigate and avoid vulnerabilities.
- We updated and improved the options page in the browser extension with a new design.

Fixes

Portal

- Corrected the redirect URL on the Snippet setup page.
- Resolved an issue where Announcement descriptions couldn't include text with file extensions.
- Improved CSV upload reliability for the Portfolio Overview.

AI Assistant

- We fixed an issue where questions to the AI Assistant were not being correctly parsed.
- We fixed an issue where the content filtering mechanism in the search service was returning incorrectly formatted responses when triggered.

Other

- We fixed an issue where SSO authentication was being wrongly redirected

Improvements and Fixes - April

Last Modified on 29.12.2025

Improvements

Portal

- We introduced a custom color picker on the Customize page.
- We enhanced the design system with improvements and resolved various bugs.
- We updated the UI dropdown in the email notification settings with a new component.

Other

- We upgraded one of the libraries we use for AI services in order to prevent introducing a vulnerability and maintain our security compliance.

Fixes

Editor

- We fixed an issue where refreshing the page while in the Validator Preview mode removed the previously added content and configuration details.
- We fixed an issue where unpublishing a Validator did not also unpublish other languages for which the Validator had been active.
- We fixed an issue where Moderators were not able to generate regular expressions for Validators or specific value input Guide Steps.
- We fixed an issue where editing the Step Title in a Guide reverted recently saved changes to the same Guide.

Other

- We updated our knowledge base integration API with KnowledgeOwl to fix an issue where not all documents were being returned as expected.

Improvements and Fixes - March

Last Modified on 29.12.2025

Improvements

Editor

- We improved how the Userlane Editor recognizes and selects elements in cross-origin iFrames.

Other

- We applied general system updates and improvements across core services to maintain compatibility and stability.

Fixes

Portal

- We fixed and updated the NPS and Survey summary/insights endpoints for more accurate and consistent data retrieval.

Assistant

- We fixed an issue where hyperlinks added to Userlane content were appearing for end users with asterisks on either side unexpectedly.

Other

- We fixed an issue where custom CSS was not injecting properly for customer instances.

Improvements and Fixes - February

Last Modified on 29.12.2025

Improvements

Portal

- We improved wording in some areas of the Portal to increase clarity.
- We improved the UI in the header and Snippet setup page to unify design.
- We improved readability by updating colors in the UI

Assistant

- We improved how Tooltips with linked Guides display the Guide title for multi-language use cases.

Other

- We updated our IdP for Managers to a more recent version to improve authentication and avoid vulnerabilities.

Fixes

Portal

- We fixed an issue where users were unable to successfully configure the Confluence knowledge base integration.
- We fixed an issue on the Happiness page where the ‘Users Reached’ count was showing incorrectly.

Editor

- We fixed an issue where the ‘test successful’ banner after testing a Tag would result in an undesired animation.

Assistant

- We fixed an issue where data in the event of a Guide Error was not being sent to Userlane content analytics if the error occurred on a step with a skip condition applied.
- We fixed an issue where text in the Guide Error modal was not showing line breaks correctly.
- We fixed an issue where global CSS affected the text formatting in Userlane content for some customers.

Other

- We fixed an issue with cloning property - now while cloning it it doesn’t move all guides to Unsorted folder which simplifies users life
- We fixed an issue where Guides would break after a page reload on the underlying application.

Improvements and Fixes - January

Last Modified on 29.12.2025

Improvements

Portal

- We have released the Benchmark Color Disabling feature flag. This update replaces dynamic color-based benchmarking with a static interval system. Scores are now assigned colors based on fixed ranges (0-20, 21-40, 41-60, 61-80, 81-100) rather than their relative position in the overall distribution of all apps.

Editor

- An important update has been released to the auto-translation functionality, allowing content creators to easily translate longer Guides into multiple languages.

Assistant

- We improved how Userlane interacts with dialog elements for end users who want to view Userlane content on these elements.
- We improved how our step automation behaves by triggering two additional event types for click interactions.

Other

- We have released a new functionality that will be connected to the Userlane features so that longer processes (e.g., long automated translations) can be run in the background.

Improvements and Fixes - December

Last Modified on 08.01.2026

Improvements

Portal

- We improved Segment dropdowns by sorting them alphabetically, making them easier to browse and use.

Editor

- We improved our ability to record Guides on top-layer elements when they present as dropdowns in the underlying application.

Fixes

Editor

- We fixed an issue where Tooltips with linked Guides specified to start from a certain step could not be successfully updated and saved if the linked Guide was updated separately.
- We fixed an issue where Guides would not end for one customer due to a cookie handling update.

Assistant

- We fixed an issue where Guides that were started and then either completed or exited would launch again without user input due to cookie duplication.
- We fixed an issue where text formatting did not appear as expected in Userlane due to global styles from the underlying application still being applied.
- We fixed an issue where the Welcome Slide text alignment was changed from center to left.

Improvements and Fixes - November

Last Modified on 08.01.2026

Improvements

Other

- We implemented a queuing service that will later be connected to multiple Userlane features. Our goal is to make Userlane more scalable when Managers run multiple features in parallel (e.g., user import/export, languages import/export auto-translation, PDF export, etc.).

Fixes

Editor

- We fixed an issue where the close ('X') button was misaligned on enlarged images in Guides and Messages.
- We fixed an issue where the code selector did not accept all CSS syntax.

Assistant

- We fixed an issue where Next Button step types were behaving like Left Click step types in a customer environment.
- We fixed an issue where the scroll position on long texts in Guide steps was maintained when navigating to the next step.

Other

- We fixed an issue where users with invalid user sessions could not re-authenticate with Userlane to receive valid user sessions again.

Improvements and Fixes - October

Last Modified on 29.12.2025

Improvements

Portal

- We have updated the custom date range to display all data, allowing customers to filter for any timeframe they need.

Editor

- We added the step automation functionality to right click and double click step types in the Editor.

Other

- We added support for slot elements to allow Managers to record Userlane content on slot elements.

Fixes

Assistant

- We fixed an issue that impacted the order in which end users can access Guides.
- We fixed an issue where the ‘X’ button on enlarged images was misaligned.
- We fixed an issue where a load event was triggered multiple times for single clicks.

Other

- We fixed an issue where images in our automated user invite emails were not loading properly.

Improvements and Fixes - September

Last Modified on 29.12.2025

Improvements

Portal

- We aligned user calculations on the Retention page to be consistent with the Adoption and Engagement pages in HEART.

Editor

- We added support for top-layer elements in Guides so that Guide steps can be recorded on these elements.

Other

- We improved how we handle errors during the authentication process, when Userlane receives the user's ID instead of the email address from the Identity Provider.

Fixes

Portal

- We fixed an issue where deleted segments were still being shown in the usage section for Attributes.

Editor

- We fixed an issue where Tooltip icons bounced on scroll for Tooltips created in tables.
- We fixed an issue where searching for and selecting a Segment to apply to a Tooltip or Tag caused the Editor to close.
- We fixed an issue where the Editor closed when a customer was trying to edit the name of Tags.
- We fixed an issue where the userlane-context cookie was being saved at both the subdomain and domain level and caused Guide to re-trigger upon page reload.

Other

- We fixed an issue that caused the Browser Extension to not fetch the latest SSO configuration from the Portal if the integrity token contained certain special characters.

Fixes and Improvements - August

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We added Tooltips & Tags to the usage section of Segments in the Portal so you have a complete overview of where your segments are being used.
- We added an end date error to Messages when you configured your end date to be sooner than your start date.

Technical & other improvements

-
- For customers who do not wish to show any user-identifiable information in the Portal:
    - we removed the tables "time spent per page" on the Engagement dashboard and "pages your users visited" on the Adoption dashboard.
    - we hide the user on the error log table in guide step analytics.

Technical improvements

- We can now temporarily remove the Userlane snippet from the underlying application to aid in debugging issues.

Fixes

Portal

- We fixed an issue where Surveys could be created with an end date set before the start date.
- We guard the Tooltips analytics page so it won't be accessible when the Tooltips feature is disabled for a customer.
- The privacy & terms link in the login pages has been fixed.
- We fixed an issue where company attribute titles could not be edited when the attribute was in use.

Editor

- We fixed an issue in the new browser extension that prevented the RegEx from being generated correctly via AI.
- We fixed an issue where Tooltip titles could not be edited in the Editor.

Fixes and Improvements - July

Last Modified on 29.12.2025

Portal improvements

UX/UI

- HEART: The cards for the individual HEART metrics now have a hover effect for a better user experience.
- We redesigned the page to set up the first URL

Scalability & Performance

- The tables for segments and Messages now remembers the previously used filter when navigating to another page in the Portal.
- Task Success page: The dropdown list to select individual Tags to show interactions over time in the respective graph is now sorted alphabetically.
- HEART: We improved the prompts used to generate the AI insights for each of the HEART metrics.

Technical & other improvements

- App Discovery now tracks more applications, and we improved the URL tracking for existing apps.
- App Discovery: We optimized the pipeline for data events used to track new applications.
- HEART: We optimized the data pipeline that calculates the HEART scores on the multi-app dashboard.
- App Discovery: We optimized the pipeline for data events used to track new applications.
- The start and end date in Messages are now shown in the selected time zone instead of the local time zone of the user.

Editor improvements

UX/UI

- We now allow empty strings for the guide completion success step instead of the default “Well Done!”.

Technical & other improvements

- We optimized our infrastructure capacity to handle an increased load.

Technical improvements

- We updated the UI of the page that is shown to users when the Browser Extension authentication fails.
- We added a search functionality in the Browser Extension that is displayed if Userlane is available on more than 7 applications.

- We added various performance improvements to the new Userlane Browser Extension built using the Manifest v3 guidelines.

Fixes

Portal

- HEART: We fixed the condition that determines whether the Happiness page should be blurred or not.
- HEART: We fixed an issue on the Happiness page that showed different results when a user segment was applied.
- Content Analytics: We fixed an issue for Guides and Announcements tables that caused published content to be hidden.
- We fixed some translation issues on the User Detail page.
- We fixed the header truncation on the Error Log page.

Editor

- We fixed an issue where tooltips on selected elements outside of the initial window size were not being scrolled down to.

Other

- We fixed an issue where the Search functionality in the Userlane assistant was not working via the new Browser Extension.
- We fixed an issue where Userlane was not appearing on certain pages of an application.

Fixes and Improvements - June

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We removed duplicate headers to streamline the design on certain pages in the Userlane Portal.
- We added the option to repeat Announcements automatically at weekly and bi-weekly intervals.

Scalability & Performance

- We upgraded core services for our analytics to the latest versions to improve performance and resolve vulnerabilities.

Technical & other improvements

- We improved how the HEART scores are calculated for the all-apps page so that HEART scores will be shown as long as there was activity for that application in the past 90 days.
- We improved how the Engagement page in HEART measures the time users spend on a page by adding additional checks.

Editor improvements

Technical & other improvements

- We improved the way in which Userlane interacts with Cookiebot.

Technical improvements

- We improved the way in which the new Userlane Browser extension handles the SSO authentication process.

Fixes

Portal

- We fixed an issue where the User Import would not complete if an attribute in the upload file existed but was in an archived state.
- We fixed an issue where users with the role Contributor could see the User Segments filter for analytics but not successfully filter with them.

Editor

- We fixed an issue causing linked Guides to Tooltips to crash under specific circumstances.

Other

- We've enhanced our data-deletion and anonymization process, ensuring even greater security and compliance with GDPR standards. Your data protection is our top priority.

- We continuously squash security vulnerabilities as they are discovered, ensuring our platform remains robust and secure.
- We have enhanced the URL Exceptions list logic to cover more specific scenarios.

Fixes and Improvements - May

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We improved how Page Segments are shown in the dropdown when adding them to a Guide. Previously they were unsorted and now they are shown in alphabetical order just like User Segments.
- We improved the filters in the analytics to make it possible to search for User Segments to use as filters and also make it clearer when no filter has been applied.

Technical improvements

- We implemented a stack upgrade to ensure optimal performance of the Userlane Portal.

Editor improvements

Performance & Stability

- Users can now publish more Tags per page without impacting the performance of the underlying app.
- We implemented a stack upgrade to ensure optimal performance of the Userlane Portal.

Fixes

Portal

- We fixed an issue where expanding the results of a Survey displayed the incorrect Survey title.
- We fixed an issue where the response rate metric for Surveys was not showing the correct calculation.
- We fixed an issue where the email invitation option was not being triggered in the user invite modal.
- We fixed an issue where the ‘draft’ status for Guides was not disappearing from the Portal after a Guide had been successfully published.
- We fixed an issue where the count of imported users who had not received an invitation email was not updated after invitation emails had been successfully sent.
- We fixed an issue where the publish toggle on Guides when accessed via search did not change when clicked.
- We fixed an issue where a URL was not being displayed in the URL table on the Engagement page of HEART.
- We fixed an issue where the date picker for Messages and User Segments was not saving the date selected by the user.

Editor

- We fixed an issue that prevented an image from being applied to all languages if “Apply to all languages” was enabled.

- We fixed an issue causing Userlane Editor not to load on an underlying application.
- Guides are now shown in the correct language if linked to a Tooltip.

Fixes and Improvements - April

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We improved the line charts in our analytics so that animations are bottom up instead of top down and line segments connect in a more visually appealing way
- We added a ‘Last Updated’ icon to the tooltip views over time chart to display when a Tooltip was last updated
- We updated old message and notifications boxes to align with new design components
- We improved that Company Attributes page to ensure that long attributes can be fully read
- We added a helpful note regarding SAML certificates to the User Single Sign-On page

Technical improvements

- We added pagination to the User Segment preview so that all users belonging to that segment can be found if thre are more than 30
- We implemented new error messages for invalid integration URLs to correspond with new backend checks
- We added validation to the name and email fields of the Team Member invite modal
- We resolved an issue so that Team Members can be re-added or edited in the team as expected

Editor improvements

UX/UI

- Updated the Guide Completion check icon animation

Performance & Stability

- Fixed various small issues with the new event schema

Technical improvements

- Language settings in the editor now update button texts like "Let's Go" immediately, ensuring a seamless experience when switching languages

Fixes

Portal

- We fixed an issue where the ‘Announcement interaction over time graph’ showed Views and Users on the incorrect Y-axes
- We fixed an issue where the search in the User or Page Segments dropdown on the Guide edit page was

broken

- Fixed an issue where some admins could see a blank App URLS page

Editor

- Fixed language switching issue where Step UI language was not updated when switching languages in a guide.

Other

- Addressed and corrected access restrictions in our API, ensuring only Admin users can reach certain sensitive functions, enhancing security measures

Fixes and Improvements - March

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We implemented a new date range picker in both the HEART and Content Analytics pages as well as the Survey and NPS builder pages. The new date picker offers a cleaner and improved experience when selecting date ranges in the Userlane Portal.

Technical improvements

- We improved how the ‘Guides started over time’ graph on the Guide’s Performance page is calculated so that archived Guides are not included and the graph total matches the ‘All Guides’ table.

Editor improvements

Performance & Stability

- We now offer content creators the possibility to use CTRL to (un)pause the Recording mode. For more information, please contact your Customer Success Manager.

Fixes

Portal

- We fixed an issue where the BypassSSO setting was not consistently shown as set for Admins as expected.
- We fixed an issue where the self-hosting download was not available for self-hosting customers.

Other

- We fixed an issue that prevented the Guide from starting automatically when opened through a direct link.
- Fixed a problem ensuring moderators now reliably receive email notifications about any errors identified in Guides.
- Strengthened protection against Server-Side Request Forgery (SSRF) attacks in our HelpDesk integration, implementing stricter controls to safeguard internal services.

Fixes and Improvements - February

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We improved and synchronized fonts and styles across NPS and Survey previews.
- We removed the ‘New’ label from App Discovery.
- We improved how long URLs are displayed in the URL tables for the Engagement and Adoption pages, and allowed the full URL to be viewed on hover.

Technical improvements

- We improved the analytics date picker so that previous date selections (e.g. the past 30 days) are now properly reflected when switching to a custom date range.
- We improved the URL processing algorithm for the Engagement and Adoption pages in HEART to accommodate for complex URL patterns in MS Dynamics.
- We improved the export handling for large amounts of data. Content exports with 20-40 languages, and 100-1K guides is now more reliable. These export capabilities ensure customers can access and leverage content for backups, internal workflows, or any other purpose seamlessly.

Editor improvements

Customization & Design

- We updated the design of the well-done check mark shown when a Guide is completed.

Performance & Stability

- We now allow the use of the CTRL button instead of ALT to enter the pause mode when recording content. For more information, please reach out to your Customer Success Manager.

Technical improvements

- When a Tooltip is appended to the target element (appendToTarget is set to true), that Tooltip will also be isolated in a Shadow Dom. This way, we limit the impact of the underlying app’s styling on the Tooltip.

Fixes

Portal

- We fixed an issue causing the Alignment and Automation settings to be overwritten if the Guide was updated in the Portal.
- We fixed an issue where if you had no published Surveys, the loading state for the Surveys list on the Happiness page would continue forever.
- We fixed an issue where Chapter titles were not being updated immediately after editing.

- We fixed an issue where applications shown on the multi-app dashboard had the wrong loading state.
- We resolved an issue preventing moderators and contributors from accessing Personal details and Team Management pages.

Editor

- Line breaks are now correctly applied in the Guide exit confirmation view if texts are long.
- We fixed a broken link located in the Tags section of the Editor.
- We fixed an issue causing the Editor to close on specific pages.
- We fixed an issue causing the Guide to close when interacting with a certain type of module.
- We fixed an issue causing the Refine Selector section to close when a comma was manually added to the selector value.

Fixes and Improvements - January

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We updated the multi-app dashboard so that applications that have been disabled in General Settings are not shown there.
- We updated the text to make the explanation for the Activate Userlane toggle clearer.
- We removed the info box on the API Token Page explaining which applications have the API Token enabled as this is now enabled for all by default.
- We increased the available space for Guide titles on the Manage page to make it easier to read and recognize longer Guide titles.

Stability & Performance

- We updated how we calculate Announcement views so that total views on the Announcements Performance page matches that of the Content Analytics overview page.

Technical Improvements

- We updated the logic for the ‘is one of’ and ‘is not one of’ data connection types when creating user segments so that entered values are lowercased and the behavior is aligned with all other data connection types.
- We improved the Guide behavior when consuming content located inside pop-ups and modals with scrollbars.
- We added additional logs to the Browser Extension Options page to help us debug issues more easily.

Editor improvements

Performance & Stability

- We optimized the way in which Userlane handles elements located inside cross-origin iFrames. We have added additional support for elements located within an iframe that is part of another iframe.
- We improved Userlane’s performance in underlying applications that rely on long URLs.

Fixes

Portal

- We fixed an issue where unpublished Guides were available in the dropdown to link a Guide to an Announcement
- We fixed an issue where users were directed to Announcements instead of Standard Surveys from the ‘View Usage’ page for Languages.
- We fixed an issue where Moderators could see the HEART scores of applications where they did not have

access in the multi-app dashboard.

Editor

- We fixed an issue where Userlane was breaking a functionality available in the underlying application.
- We fixed an issue that was causing Guides to break on certain web pages.

Other

- We enhanced security by updating our NodeJS framework and tightening our checks, along with implementing automated solutions to ensure our platform stays up-to-date.
- We enhanced the verification process for setting up enterprise search integrations (such as Confluence, SharePoint, Zendesk, etc.), ensuring a more reliable connection by thoroughly analyzing the response content beyond just confirming availability. This improvement ensures that our integrations not only connect but also function as expected, offering a robust and dependable search experience.

Fixes and Improvements - December

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We updated the Create an Announcement page. Now, it matches the Survey page.
- You can now search for Segments you wish to add to an Announcement.
- You can now edit the search hint text in the Customize section

Editor improvements

Performance & Stability

- We have added the version number to the Editor.
- When visualizing a step within a Guide, users can scroll through the whole element as long as it is visible on the screen.

UX/UI

- You can now edit the Guide title from the Editor.
- We have updated the Guide title, Tooltip, and Tag name field designs.
- We have updated the Tooltips-related icons from the Editor.

Technical improvements

- We fixed an issue causing the SSO initial setup not to run for US-based customers.
- We updated Node.js to the latest version for multiple services.
- We added the Options section in the Browser Extension. It provides you and our team access to relevant browser configuration information for debugging purposes.
- The Browser Extension can now load Userlane if the accessed URL's domain and path parameters match the URL set in the Application URLs list. For more information, please get in touch with your Customer Success Manager.

Fixes

Portal

- We fixed an issue where NPS response rate calculation could lead to a score of over 100%.
- We fixed an issue where images were not being shown in the Announcement builder for US clients.

Editor

- We fixed an issue causing the Editor to crash if “appendToTarget” is added to the code selector when refining the selected element.
- We fixed an issue causing Userlane to block specific actions in popups.
- We fixed a user segmentation-related issue causing linked Guides to Tooltips not to be shown to users.
- We fixed an issue causing the “Skip if next element is found” condition not to work correctly under specific circumstances.
- Userlane displays the empty Tags section correctly if no Tag has been created.
- We fixed an issue causing page segmentation to fail if the condition contained subdomain and path

parameters.

Fixes and Improvements - November

Last Modified on 29.12.2025

Portal improvements

UX/UI

- We added an export option to the multi-app dashboard.
- We made the date picker dropdown more user-friendly and intuitive.
- We added a UI update to tooltips to indicate the status of them.
- The API Token page is now available for all customers by default.

Performance

- We increased the performance of the Manage Guides page.

Other

- We upgraded the Portal authentication service to a newer version.

Editor improvements

Performance & Stability

- Users can now easily complete guides that require scrolling through a large highlighted area connected to a step.
- We fixed an issue causing the Tags list view not to be displayed correctly if no Tags were created.
- We improved how the Editor search works to provide more relevant results.
- We improved the behavior of Page Segments that use different URL patterns (including subdomains and path parameters).

UX/UI

- We added new icons for Hints.
- You can now filter Tags to display only those available on the current page.
- We fixed several issues that improve the UX in the Editor list.

Technical improvements

- We increased the security and reliability of our password policy.

Fixes

Portal

- We fixed an issue for Page Segments that displayed an error “page segment name already exists”.
- We fixed an issue where the translation import was not working as expected.

Editor

- We fixed an issue that caused a step to be skipped if it was between other steps that contained skip conditions.
- We fixed an issue blocking Userlane from grabbing the right element when recording inside a dropdown.

- We fixed a specific app issue causing simple and NPS surveys to remain open after the response was submitted.
- We fixed an issue causing the Hint icon or Beacon to be shown twice in the Editor mode when manually adjusting the icon placement.
- We fixed an error thrown when using the Editor search functionality.
- We fixed a charset-related issue causing the Userlane snippet not to load in certain apps.

Assistant

- We fixed an issue where the SharePoint enterprise search integration was not displaying results.

Fixes and Improvements - October

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- We introduced a new design for our registration and magic link pages. The designs are now aligned with our login page layouts. Our input fields are optimized to seamlessly integrate with all password managers.
- We merged the two separate pages for User segments and Page segments into one. A single table now displays all your created segments and allows you to filter them by segment type.

Other

- We added missing help documentation to several pages in the Portal.

Editor improvements

Stability

- We implemented several general improvements to better support recording inside Cross-Origin iFrames.
- We improved the stability of the auto-translate feature for long Guides.

Other

- We updated several Editor buttons to follow our Design System.

Technical improvements

- We implemented various improvements to remove the flickering when a Tag or Tooltip is deleted in the Editor list view.
- We unified the logic used for Page Segmentation and the URL Exceptions List.

Fixes

Portal

- We fixed a bug that returned the wrong usage number for user segments in the NPS builder.
- We fixed several UI issues.

Editor

- We fixed an issue causing the RegEx generation process to throw an error under specific circumstances.
- We fixed an issue causing drop-downs in the Editor not to close after they were clicked.
- We fixed a UI issue connected to the way in which the search icon was positioned in drop-downs.
- We fixed an edge case where the Welcome Slide couldn’t be closed.

Other

- We fixed a bug where translations for Indonesian could not be uploaded via the language import.
- We fixed a bug where special characters in application attributes like German umlauts were not being lowercased in the backend.
- We fixed an issue causing the Browser Extension not to load the available Userlane applications under specific circumstances.

Fixes and Improvements - September

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- Before, we only displayed the title of the message in the Messages table. Now, we show both the name and title, making it easier to identify Messages.
- We've introduced an app switch to simplify app management for our Managers on the multi-app dashboard.
- On your multi-app dashboard, you can now view and manage your global settings.
- We updated some illustrations and wording in the Portal.

Scalability & Performance

- Our new Analytics settings page is out! It's a page that combines all the Analytics privacy settings in one place. Previously, you had to navigate through each property individually to enable HEART analytics.
- We now show how many Tooltips are using a User Segment in the View usage column.
- We've improved the success and error bar in the Portal.

Technical improvements

- We have upgraded our Portal authentication service to a newer version.

Editor improvements

Stability

- The Hint and Beacon icon position is calculated faster now (after each interaction with the underlying application).
- You can now publish a Tooltip in all languages with a few clicks either from the List view or from the Edit mode.
- When recording a new Guide or Tooltip, the recording is now always started in the default language set in the Portal.
- The Editor now goes to the last step you saw when exiting the Preview mode.
- If steps with Skip conditions are delayed (for example for heavy web applications) and their corresponding elements can be found on the page, the delay will no longer be applied.

Other

- We changed the Editor buttons to follow the Design System.
- The Editor now uses the word “archive” instead of “delete” for Guides.

Technical improvements

- We have improved the stability of the Player/Editor tech stack with a major infrastructure upgrade.

Fixes

Portal

- Historical HEART URL data now shows parameters better (meaningful content after the “?” character).
- We fixed an issue where the UI was blinking while the user was typing a segment name.
- We fixed some discrepancies between the preview of an Announcement and how it was shown in the actual Player.

Editor

- We fixed an issue causing a step to be skipped too quickly if the “Skip if the next element is found” condition was enabled.
- We provided additional stability improvements for the Cross-Origin-iframe support.
- We fixed an issue causing the Editor to stop working without a valid session.
- We updated the layout in the Assistant if Passive Mode is enabled.
- We fixed a focus issue when editing the code selector of a Tooltip.

Other

- We fixed an issue causing end users to be logged out from Userlane (Browser Extension - SSO) when using Firefox.

Fixes and Improvements - August

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- Our loading states in the Portal have been improved and are more consistent now. You will notice all of them have nicely rounded corners and a smoother transition to the loaded state.
- When navigating the Portal, you will now automatically be scrolled to the top of the page, instead of having to scroll up every time you go to a new page or subpage.
- We have improved the UI in the “add users” flow.
- We have updated the API token page and modal.
- The navigation sidebar has new labels and icons, and will initially be expanded. Your choice to leave it expanded or collapsed will be stored.

Scalability & Performance

- When a Guide is published, the Delete button is disabled now.
- Analytics graphs are now more performant and re-render only when the actual data is changed.
- The design system tables used on analytics pages and most of the Portal are now much more performant. You will no longer have to wait for a long time after setting the page size to 100 or more rows.

Technical improvements

- We reduced the idle session timeout to 12 hours from the previous value of 30 days to increase the security for Portal sessions.

Other

- We have introduced a feature that, if enabled, redirects invited Edge users to the Chrome Web Store for the Userlane Browser Extension installation.

Editor improvements

Stability

- The recording mode now always starts in the default language set in the Userlane Portal.
- When a Guide is published, the Delete button is disabled.
- When a Tooltip is published, the Delete button is disabled.
- We fixed an issue causing the Delete modal not to pop up when trying to delete a non-selected step.
- The Editor now shows the Unpublish button if a Guide is published.

Fixes

Portal

- The Announcement builder will now show the correct "Live since" date, while previously it would show the date the announcement was published.
- We fixed an issue where you couldn’t unpublish the NPS Survey from the messages table.

Editor

- We fixed an issue causing the "In progress" message to still be shown even after the auto-translation process was completed.
- We fixed an issue causing auto-translation to skip certain languages during the translation process.
- We fixed a specific scenario causing the Editor to disappear once the recording was started.
- We provided additional fixes to better support element recording inside Cross-Origin iFrames.
- We fixed an issue causing the cross button to not be aligned with the assistant if the latter was located on the top of the screen.
- We fixed an issue causing the links not to be visible if the assistant was on the top of the screen.
- We fixed an issue causing the Editor to close when changing the language.
- We fixed an issue causing the subselector not to work for elements located outside ShadowDOMs and iFrames.
- We fixed an issue causing classes not to work with the subselector and content selector when manually refining the selector.
- We fixed an issue causing a Hint to close after moving the cursor away from the selected element.

Release note - Surveys

Last Modified on 29.12.2025

What is new

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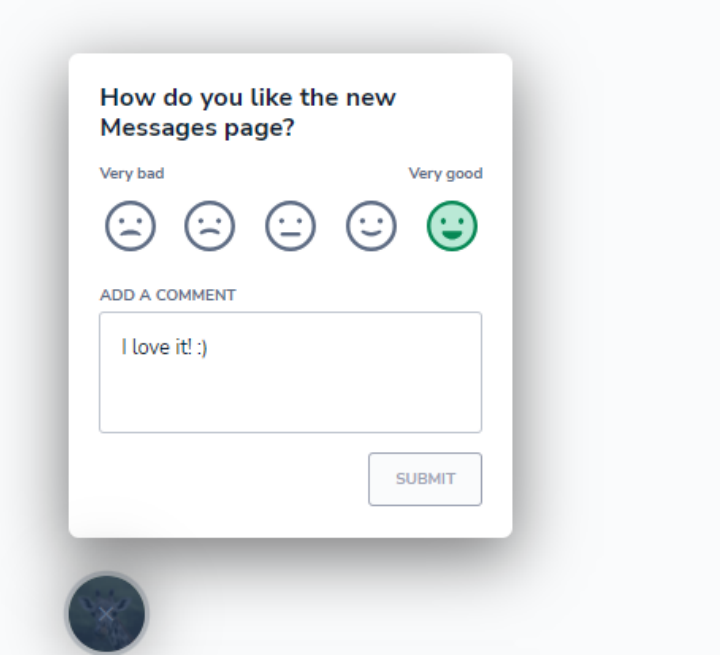
Understanding user sentiment is the key step to improve your digital adoption efforts. Previously, we used NPS surveys to measure the user loyalty. However, NPS surveys are limited to one consistent question that checks how likely users are to recommend your application.

To enhance your ability to collect the user opinions about your app and its features, we've added a more flexible Survey type. This enables you to ask any question and publish multiple Surveys across various pages and user segments within your application.

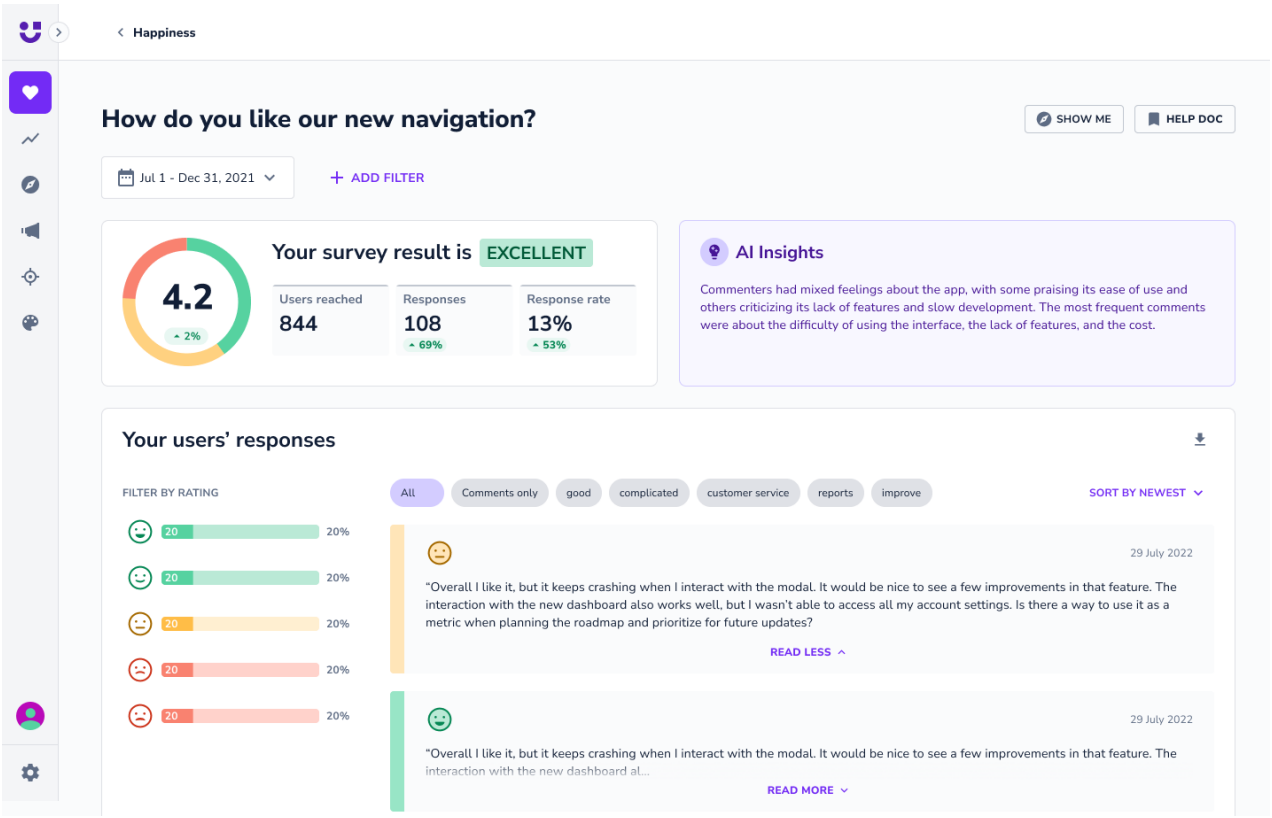
With the new smiley-based scale, Survey participants can easily provide feedback by selecting from a range of 5 smileys representing different sentiments. You will be able to see your overall Happiness score on your HEART dashboard. This score will include results from both NPS and survey responses. Each survey will have its own analytics page, where you can track its responses and view and export the comments users have left.

How to find it

To create a new survey: go to the Messages in the Portal > 'Add a message' > Standard survey



To see the responses: go to the HEART > Happiness > Choose a Survey in the "All Surveys" table



CHECK OUR ROADMAP

Release Note - Process automation via Guides

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

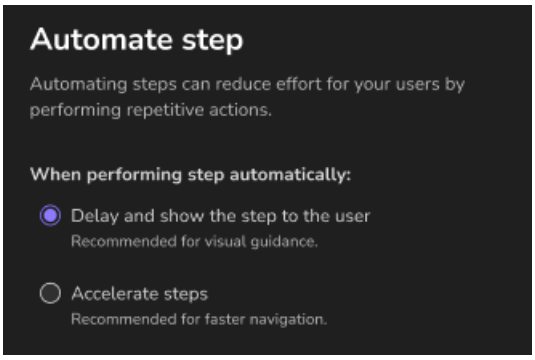
What's new

Some processes require a lot of steps by the user that have no deeper purpose other than navigating to the correct place in the application or entering the same information repeatedly. To reduce the effort for your users, Userlane can now perform repetitive actions.

Managers can now automate individual and sequences of steps in Guides, making the process learning experience more efficient.

Step automation is supported in the following step types:

- Left click
- Left mouse button down
- Specific value



How to do this

Start Editor > Access a step supporting automation -> Click on the automation icon next to the step type, and choose the preferred automation method.

ℹ Please delete the browser cache if you do not see the new functionality in the Editor.

Release Note - Improved HEART scores

Last Modified on 29.12.2025

What is new

Instead of visually presenting the scores with circles, we've transitioned to using a speedometer to represent your main scores for HEART letters. Currently, we are using a 5-point scale for every letter's assessment. Previously we've used a 4-point scale.

New scores for each letter have the following ranges: Very low (0-20), Low (21-40), Fair (41-60), High (61-80), and Excellent (81-100).

How to find it

Go to your HEART page: /analytics/heart/overview



ℹ Please keep in mind that we use a 4-point scale for NPS results to ensure consistency with industry standards for NPS. We grade NPS in the 4 point scale: Poor (-100-0), Good (0-30), Great (31-70) and Perfect (71-100).

CHECK OUR ROADMAP

Release Note - Export Guides as PDFs

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

What is new

Not every user, content reviewer, or translator has access to your application or Userlane. To solve this problem, Managers can now easily share existing Guides in their original app context by exporting them as PDF files.

The Guide export feature comes with the following:

- Multi-language support (support for screenshots per Guide language)
- Guide-level screenshot capabilities
- Step-level screenshot capabilities
- Screenshot-related notifications in the Editor

If you would like to learn more about this functionality, check the following support article.

How to do this

Start Editor > Access a Guide or a Step -> Open the corresponding Options menu, then click the Take Screenshots button.

To export a Guide as a PDF > Access Portal > Guides > Access the Guide that contains screenshots> Click on the Options menu > Export Guide as a PDF file.

ℹ If you would like to get access to this feature, please contact your Customer Success Manager for more information.

Fixes and Improvements - July

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- Smaller UI improvements, e.g. paddings have been adjusted in the HEART Analytics pages.
- Smaller UI updates of buttons in the Portal.

Scalability

- The date picker in the Portal now uses "Current month", "Previous month" and "Last 3 months", and it automatically calculates the "Last 30 days", "Last 60 days" and "Last 90 days".
- The date picker now contains new options for "Yesterday" and the "Last 7 days".

Editor improvements

Stability

- We improved the support of the Editor on smaller screens.
- We updated the Tags overview page to include the case when there are no Tags.
- We added additional improvements for the "appendtoTarget" setting to support more complex scenarios.

Other

- We removed the dark background and element highlight when Managers pause the recording.
- The help docs icon is now linked to individual content pages.
- We removed the pop-over from Tooltips and Tags that have a title that is not truncated.
- Empty states were improved in the Player for empty chapters and announcements.

Fixes

Portal

- Password managers now work with our Portal login form.
- We fixed some wordings in Announcements.

Editor

- The content attached to elements located in Cross-Origin iFrames can now be visualized and interacted with by end users.
- You can now reselect the position for Hints with an icon that have auto-position enabled.
- The lists of page and user segments are now correctly shown when the Manager navigates to another page or changes the language.
- Long words and links get correctly wrapped in tooltip text boxes.
- You can preview from a skip step if the element is found on the page.
- When refining the selector or positioning the step, you can no longer interact with step settings and the underlying application.
- Hints with icons close when hovering away in a Guide.

- We fixed the cursor behavior when hovering over the alerts column header.
- Drop-downs located inside the Editor all use the same UI now.
- The keyboard shortcut labels for Any Value Steps are now correctly displayed in the step box.
- The options menu now closes when interacting with one of its elements.
- The pop-overs for Contributors have been updated in the step options section.
- Contributors can now edit the title of a Tooltip.
- The options menu in the Guide List view no longer overlaps with the Delete Guide pop-up.
- The “+” Add Media button was removed from the alignment mode.
- We fixed an issue causing the Editor buttons to inherit the custom design color.
- We fixed an issue where the content selector was not saved in the code selector.

Release Note - Auto-translation for Guides

Last Modified on 29.12.2025

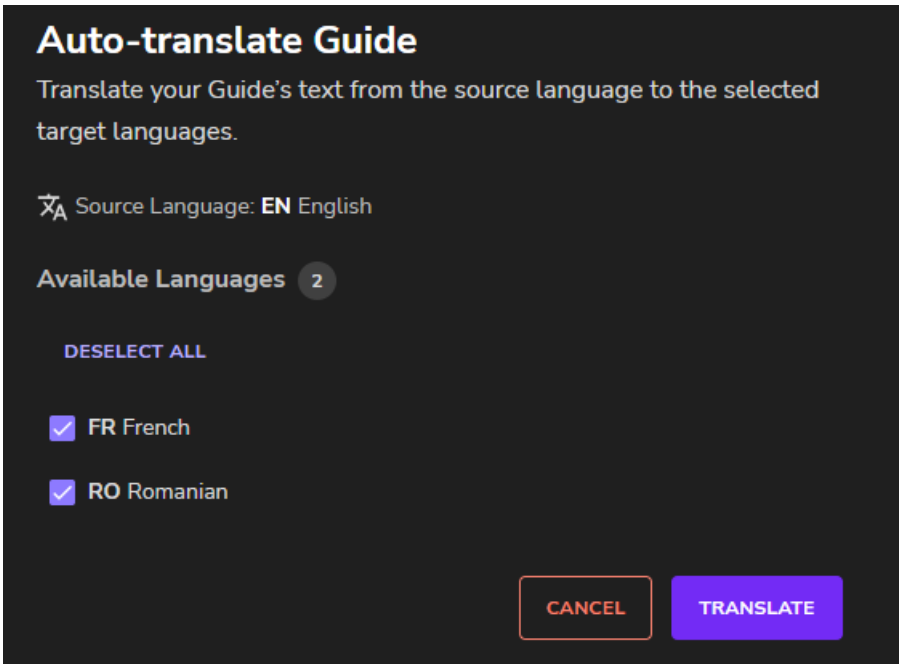
Release Demo

Your browser does not support HTML5 video.

What's new

Managers now have the option to auto-translate Guide content from a selected source language into any number of target languages with the click of one button.

The auto-translation feature is available in the Guide menu of the Editor, and may require a review of the Userlane language keys, which have to be based on the ISO language codes in order for the translation to work.



How to do this

Start Editor > Access a Guide or a Step -> Open the corresponding three-dots menu, and then click on the Auto-Translate button.

ℹ Please delete the browser cache if you do not see the new functionality in the Editor.

Release Note - URL parameters in HEART

Last Modified on 29.12.2025

What is new

We are excited to announce the latest improvement to our analytics. The HEART analytics displayed application URLs by removing everything after the "?" character, commonly known as parameters. This made it easier to see the URLs in a clean way.

However, in certain applications, the parameter section of the URL contains essential information about your application. We have implemented a solution to display the parameter part in these specific cases while keeping the URLs clean where they are not needed. This should improve your URL display so that you can know which parts of your application are being used.

Please be aware that not all scenarios may be covered. We encourage you to provide us with feedback and inform us of any aspects we might have overlooked.

How to find it

To find this URL table, just visit Adoption or Engagement section of your HEART.

- HEART analytics > Adoption > Table "Pages your users visited"
- HEART analytics > Engagement > Table "Time spent per page"



ℹ This change is released and will take effect on the URLs from this moment onward. We plan to improve the historic data as well, which will happen in the second half of the August.

CHECK OUR ROADMAP

Release Note - Element selector: Improved UX and functionality

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

What's new

We have revamped the code selector section. The update brings new functionalities that help Managers refine the selector:

- Element uniqueness informs Managers if multiple similar elements are on the respective web page
- You can refine the selector by navigating the HTML element tree
- Use additional selector options to define the selected area's size or the selected element's sibling
- You can now easily preview the impact of the code selector changes as you apply them

How to do this

Start Editor > Access a Step, a Tooltip or a Tag > Click on Refine selector > Start refining the selected element.

Please delete the browser cache if you do not see the new functionality in the Editor.

Release Note - Logos on the Applications dashboard

Last Modified on 29.12.2025

What is new

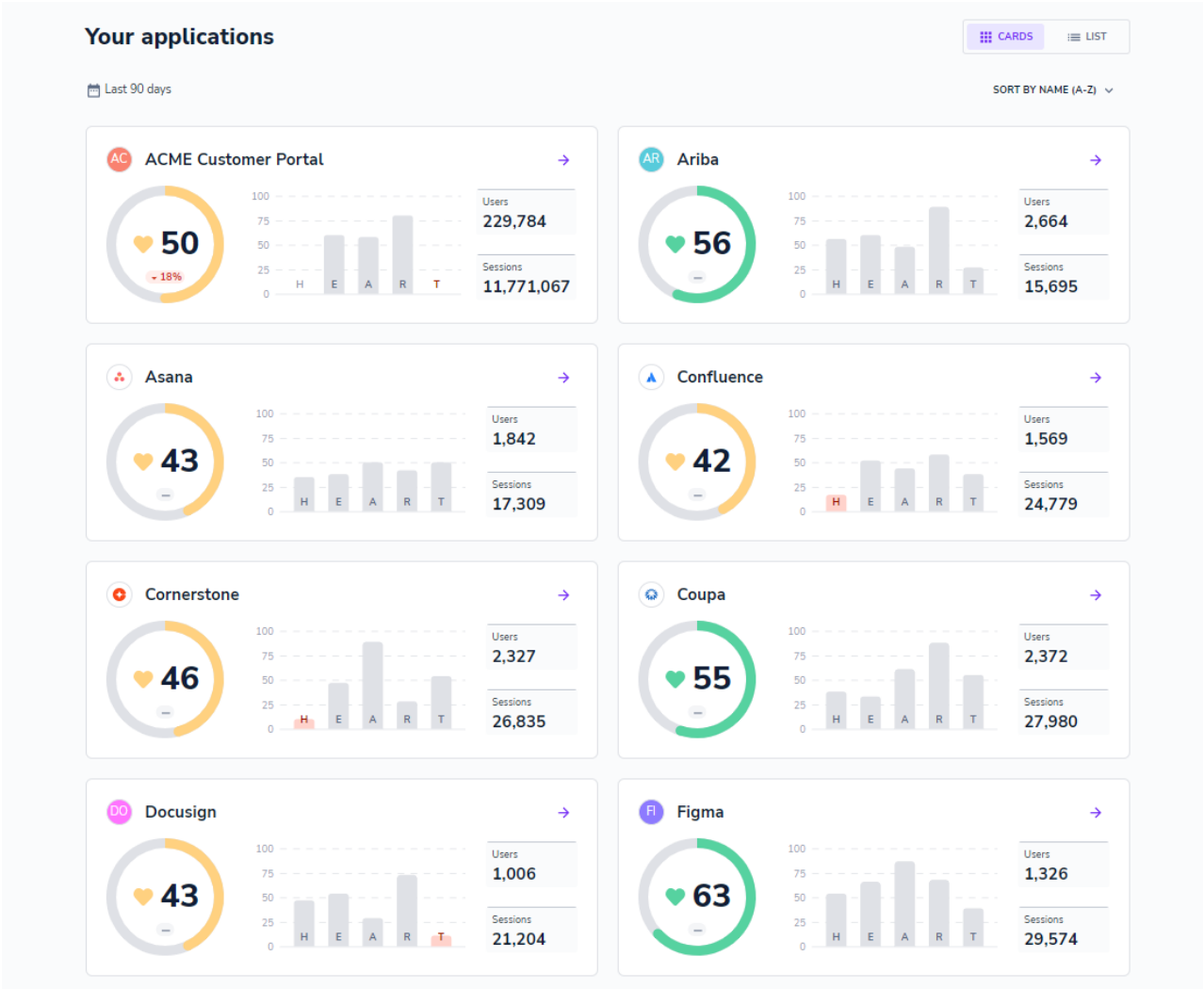
Logos on the "Your application" dashboard were taking the Avatar image. In many cases, this was the same image so every application looked the same at first glance.

We now catch the favicon of the default URL to present it as a logo. If the favicon is not available we create a logo out of first two letters in the Application's name.

This is useful in case you have many applications on that page and it gives you a quick visual indicator of what application you are looking at.

How to find it

In your Portal, click on the Userlane logo.



CHECK OUR ROADMAP

Release Note - NPS AI insights

Last Modified on 29.12.2025

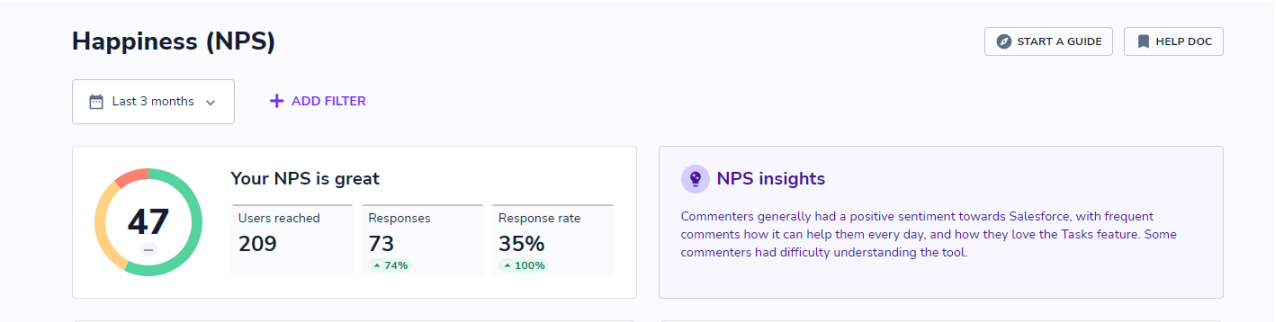
What is new

Your browser does not support HTML5 video.

Your NPS analytics now has AI insights. Our intention was to offer you a short and quick overview of the user sentiment. This enables you to quickly understand and identify areas that require attention, without the necessity of reading through every comment.

How to find it

Heart > Happiness (NPS) page



ℹ The insight might slightly differ when you refresh the page.

CHECK OUR ROADMAP

Fixes and Improvements - June

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- We updated the UI of the Guide section (previously Manage section). Visual changes include a new hover state that aligns better with the overall appearance. The "Promote" action can now be found in the “more” dropdown. Buttons have been replaced with our design system component.
- We improved the Engagement graphs on our HEART page with a few minor wording updates.

Scalability

- The "Messages" section got an update. Apart from viewing announcements in the table, you can now access your NPS (Net Promoter Score) and, in the future, your surveys as well. Release note.

Other

- You can now export the user list from the "Users" settings page to CSV, which helps you to keep track of pending users and determine who needs to be invited again. The user table is now paginated. Additionally, you can also export the "Team" section to CSV to monitor which apps your colleagues can access. Release note

Editor improvements

Stability

- Tooltips are now displayed correctly when attached to elements positioned in fixed containers.
- You can now use appendToTarget inside the code selector to group a content type (Tooltip) with the target element. For more information, check how you can further refine element selection with the code selector.

Other

- Several UI improvements that bring the Editor in line with our design system.

Technical improvements

End User API

- We added a query parameter for lastSeenAfter to allow customers to pre-filter the API query by users active after a certain date. This generates a faster and more targeted data export.

Other

- We have improved the performance of the Assistant.

Fixes

Portal

- Fixed wrong URLs in the Alert email and in the Error log.
- Fixed the Disabled button when adding an integration.
- Fixed duplicate URLs in the Adoption table, as well as the sorting issue on the same table.

Editor

- We fixed an issue that was causing the Editor to crash under specific circumstances.
- We fixed an issue that was causing the Editor to crash when no action key was selected for any specific value step type.
- We fixed a redirect issue connected to the Analyze button.

Release Note - User and team (settings) export

Last Modified on 29.12.2025

What is new

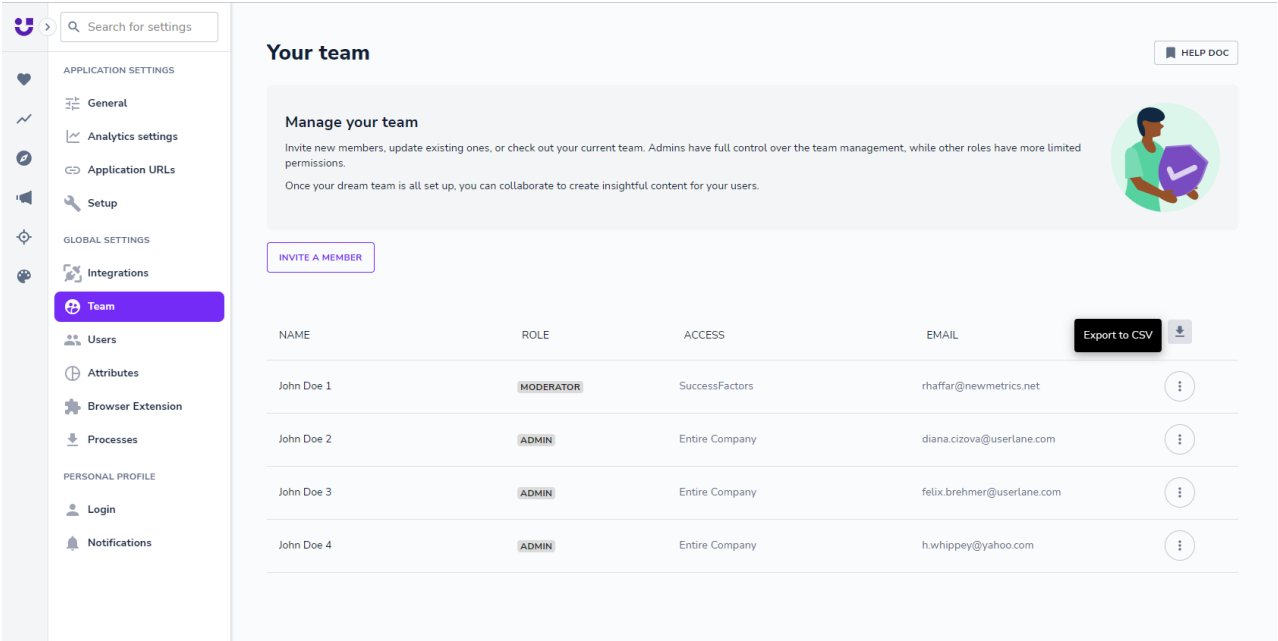
You can now export the list from two "Settings" pages: Team and User.

You can use Team export to track what apps your colleagues have access to. On the other hand, use User export to track easier which uploaded user is still pending or who should be invited again or removed from your user list. We have also added the pagination to the User's table and you can load (and export) 200 rows per page.

How to find it

Settings > Team

Settings > Users



ℹ Keep in mind that you can only export what you see on the page. Extend the "items per page" to 200 rows for smaller amount of pages. Moreover, in your Google sheet or Excel, you can use the "Import" option followed by "Append to this sheet" when importing results from multiple pages to one sheet.

CHECK OUR ROADMAP

Release Note - New messages page

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

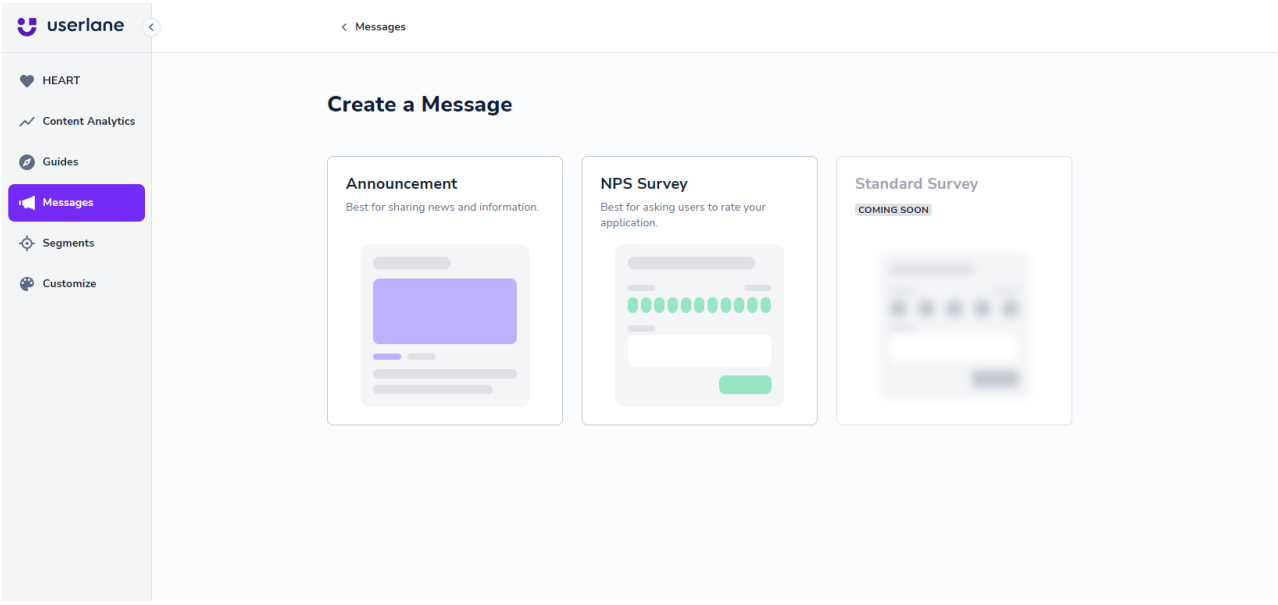
What is new

We have made some changes to the messages intro section. When you click on messages, instead of only seeing announcements in the table, you will also see a table with all your messages, including announcements, NPS (Net Promoter Score) messages, and in future your Surveys.

If possible, the table will display the headline of the announcement or the actual question for NPS or future surveys.

When click on "create a message," you can choose the type of message you want to publish.

How to find it



ℹ Please note that the survey feature is still in development.

CHECK OUR ROADMAP

Release Note - Manage Guides in the Editor more easily

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

What is new

Identifying which element corresponds to each step when creating or maintaining Guides can become tricky, especially when they are longer. With the new redesign of step card panels, Managers will get access to additional visual context for each step directly in the Editor panel, helping them manage Guides with greater ease and efficiency.



The new step card panel contains:

- The step preview for better visual context
- The “Preview from this Step” button and a “More” menu to easily access important step functions
- Icons that indicate if an element is not available on the page or has an error
- And other UI-related improvements, such as colors.

How to find it

The new changes are available in the Editor -> Guides.

CHECK OUR ROADMAP

Release Note - Beacons Clicked Metric

Last Modified on 29.12.2025

What is new

Your browser does not support HTML5 video.

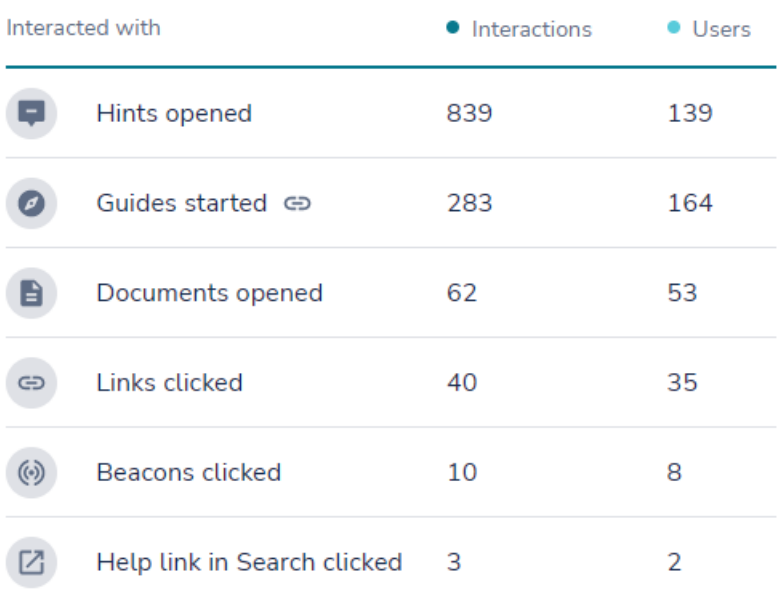
In order to make it easier for managers to track the performance of different content types, we have added interaction metrics for Beacons to the Content Analytics overview page in the Portal. This small improvement allows you to differentiate between your different Tooltip types:

- Hints opened - user was hovering over an element with a hint

- Beacons clicked - clicking on a pulsating beacon to open it

How to find it

Analytics > Content analytics overview > All content types table



Interacted with	Interactions	Users
Hints opened	839	139
Guides started	283	164
Documents opened	62	53
Links clicked	40	35
Beacons clicked	10	8
Help link in Search clicked	3	2

ℹ Currently, this includes only aggregated metrics. Stay tuned for a separate subpage in future with more detailed information on individual Tooltips interaction.

CHECK OUR ROADMAP

Fixes and Improvements - May

Last Modified on 29.12.2025

Portal improvements

Customization & Design

- The Beacons color can now be set in the Portal.
- General step-related improvements in the Design section to better reflect the latest stepbox interaction improvements.
- We implemented a new datepicker in the Announcement and NPS builder.
- Login pages got redesigned.
- All radio buttons in the Portal are now using our standardized design system component.

Scalability

- We now show the complete view number in the Announcement analytics table, previously it was cut off due to a set limit.
- The NPS responses table now has the “items per page” option, so you can select 100 responses per page for easier export.
- Deleted Tags and Tooltips can now be shown in the Analytics section.

Other

- We removed the “Delete” button from segments that are used in active Tooltips to avoid content creators from accidentally deleting a segment that is still in use.
- Deleted tags now have a “deleted” label in the Task success page.
- We have removed the “Interactive Tour” input field.
- Small wording changes.

Editor improvements

Stability

- Beacons disappear only after the end-user interacts with them. Managers will continue to see them in the Editor mode.

Scalability

- We have refined the permission system for the Tags creation process.

Other

- In the list view, you can now visualize the Chapter a Guide belongs to by hovering over the Guide.

- Guides in the Editor are now linked to their corresponding analytics page in the Portal.
- The Preview button for Guides is now available at the bottom of the Editor.
- A new sidebar design has been released.

Technical improvements

User Authentication

- We improved our passwordless authentication via Browser Policy by allowing the use of various parameters for either openURL or a token authentication.

Fixes

Portal

- Fixed the NPS response export; the user response was down in multiple rows.
- Fixed the bug where the "Open application" button did not open the URL setup page in case the application has no URLs added.
- Fixed the bug in the “Adoption” table where the percentage of users on the page was wrongly calculated.
- Guide ID was missing from the Manage section, so we brought it back.
- Fixed the bug in the Retention page. Some applications had 0 for daily and multiple times a day.

Editor

- Fixed an issue where the Userlane Avatar was positioned outside the viewport when added on the right side of the screen.
- Steps are no longer recorded twice within Same Origin iFrames.
- Links are no longer getting cut in the Announcement popup (when the Announcement is pushed for the first time).
- The property icon now fits the Editor bar.
- Footer buttons in the code selector view are now aligned to the right.
- You can now scroll again in the RegEx view (specific input value type).
- Fixed an issue that prevented Tags and Tooltips from being saved on certain pages
- Current tutorial element is refreshed every 500ms to avoid “step not found” issues for iframes/dynamic content.

Other

- We fixed the broken links and images from the Error alert email.

- We updated some texts used in the Browser Extension.
- Fixed an issue where Properties were still seen by Manager Users after being removed from their Company.

Fixes and Improvements - April

Last Modified on 29.12.2025

Portal improvements

Performance

- We removed the "show 200 rows” per page option from the tables so that it doesn't affect the performance.
- We added pagination to the Announcement and Guides analytics tables so that it doesn't break while loading many items.

Scalability

- We added the Announcement ID to the CSV download.
- We improved the Welcome Slide buttons.

Editor improvements

Stability

- We added a maximum width for Tooltips.

Scalability

- We improved Tooltips analytics to only track those that are available in the main viewport of the user.

Other

- We reviewed and improved the Editor user interface of the Regular Expression tab in the Specific Value Step type.

Technical improvements

Performance

- We implemented a few under-the-hood improvements that allow Userlane to load much faster in the web browser.
- Userlane now requires fewer resources (MBs of data) to run.
- We added additional property configuration information to the troubleshooting page of the Browser Extension.

Fixes

Portal

- Fixed a loading issue on the Retention page.
- Fixed some cache issues, so that no cache refresh is needed after smaller text updates.
- Fixed an NPS response export issue.
- Fixed an NPS builder timezone issue so that the builder doesn't break for customers in a different timezone.
- Fixed an issue with the Platform analytics not loading when a user segment was selected.
- Fixed an issue where the wrong publish date was shown for Announcements.
- Fixed an issue in the color display of hints (Tooltips and Beacons).
- Fixed an issue where deleting a language did not work.

Editor

- The list of available page segments is now correctly shown in Tags on smaller screen resolution.
- The Editor no longer crashes when editing the Code Selector.

Other

- The NPS is no longer animated while the user is typing in the text box.
- Fixed an issue in the registration of new Manager users.
- Fixed an SSO SAML authentication issue.

Fixes and Improvements - March

Last Modified on 29.12.2025

Portal improvements

Performance

- The “All Guides” table export includes a list of Guide names and their corresponding Guide IDs.

Stability

- UI improvements of loading and empty states as well as numbers format and illustrations.

Scalability

- The Portal now uses uniform UI hero boxes and buttons.
- Our analytics wording has been simplified. All calculations remained the same.
- Our csv export has totals added to it.

Editor improvements

Performance

- We have updated the design of toggles and dropdowns in the Editor.
- The speed of Autofill (step type: Specific value input) will adjust based on the length of the text.
- We have provided under-the-hood improvements to the Editor to help us develop features connected to Tooltips faster and more efficiently.

Stability

- A new Guide step design was released to enable end users to interact with the underlying application more quickly and easily
- The Editor has received the following design updates: dark color update and new slide toggle sizes.
- We added a "View Analytics" button in Tags List view to access the Portal and the Task Success page easily.

Scalability

- Tooltips with icons can now be used inside iFrames.
- Tooltip content can now be targeted in context to the underlying page with the help of Page Segmentation
- Userlane will display an error alert for each active Tag if Advanced Analytics is not enabled.

Technical improvements

Stability

- You can now record elements located inside an iFrame located inside a shadow root.
- We have updated our Code Selector Engine to handle better elements located inside Shadow DOMs.
- Improved debugging process for Browser Extension issues connected to iFrames.

Fixes

Portal

- Language codes are now displayed correctly in the activation choice.
- The "Users" metric now matches on both the Retention and Engagement pages.
- You can see the NPS analytics even if you do not have HEART turned on.

Editor

- Prevent a created tooltip from overriding another tooltip name.
- Display Tooltip when in Preview mode.
- Userlane will show an error if you try to create a Tag with a duplicate name.

Other

- Screenshots of the reselected elements are now shown in the exported PDF.
- Screenshots of the elements located on different pages from where the Guide was started, are now shown correctly in the exported PDF.

Release Note - New Portal navigation

Last Modified on 29.12.2025

What is new

Your browser does not support HTML5 video.

We are thrilled to announce a significant improvements to the navigation experience within our Portal. Let's dive into the exciting changes:

- **Sidebar**: Instead of the horizontal navigation all options are now in the new sidebar that enables you to seamlessly navigate trough the Portal

- **Settings location change**: In our new navigation all settings options, e.g. Application URLs, Team, Personal Profile can be found when clicking on the settings icon.

- **Sign out button:** It is now located under the settings icon.

- **Switching between apps**: Easily change applications you are operation in from the sidebar.

- **Search:** You can search through the side bar options.

- **Your multi-application dashboard:** Click on the Userlane logo to go to your dashboard

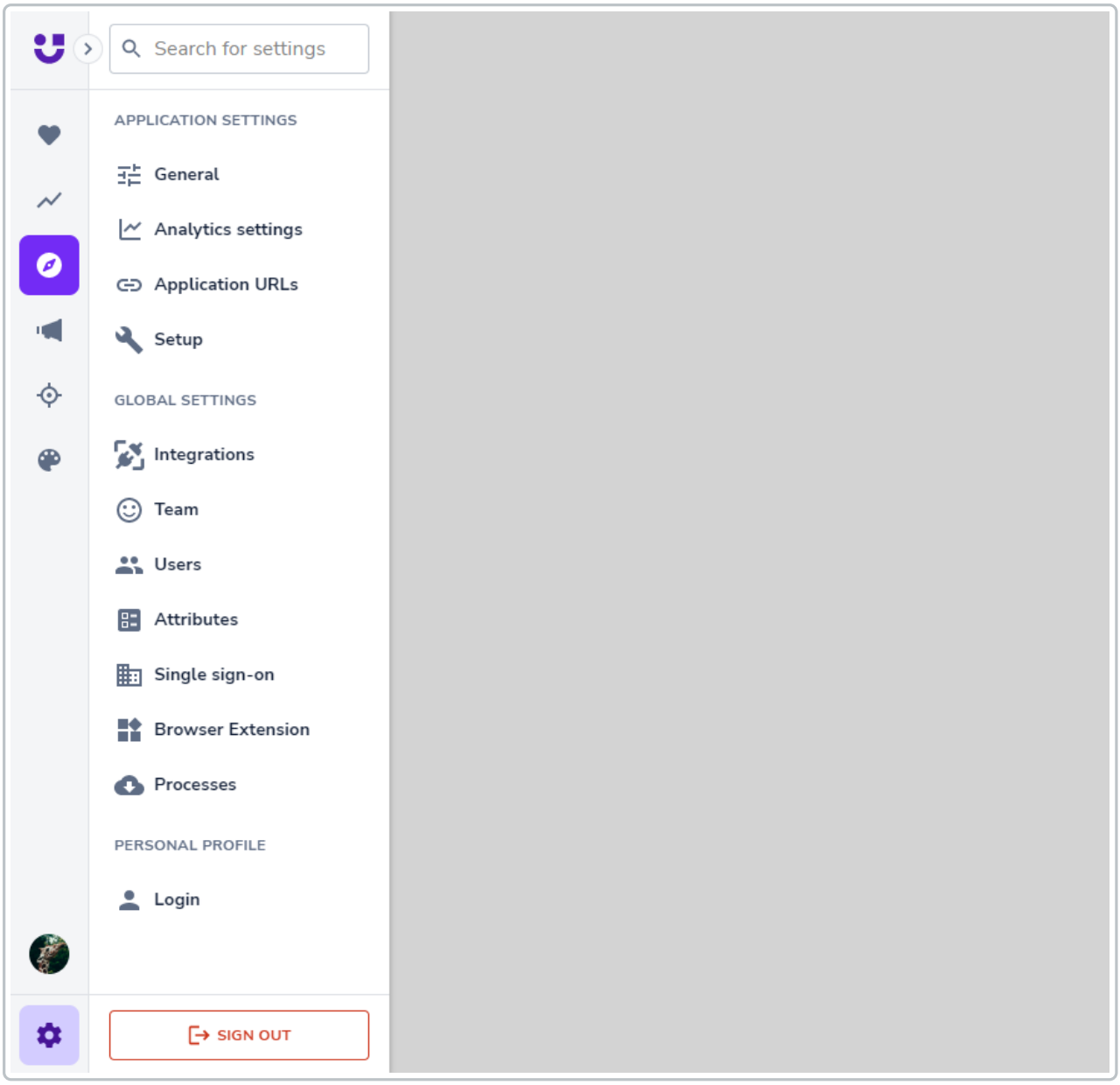
- **Subpages:** For example "Guide analytics" have been replaced with tabs so that they are easily discoverable.

- **Contact us:** Option to contact us is in a new contact form in our Assistant.

- **Userlane roadmap:** Now our roadmap is located in the footer.

How to find it

Log in to your Portal and you will see a sidebar on every page.



ℹ While some changes may not currently be visible in the Portal, they should be implemented within the next two weeks.

CHECK OUR ROADMAP

Release Note - Announcement API

Last Modified on 29.12.2025

Release Demo

Your browser does not support HTML5 video.

What is new

We are excited to announce the expansion of our API export functionality to include announcement data. With this update, you can now collect more comprehensive data on users' views and interaction with your announcements.

There are two event types provided in the Annoucement API:

- **AnnoucementViewed:** this event type is triggered when an Announcement is displayed to a user
- **AnnouncementInteracted:** this event type is triggered when a user clicks on a button or link within the Announcement

In addition, each event will include metadata to help you understand viewer behaviour:

- **Timestamp**: the time the event occurred
- **User**: the ID of the user who viewed or interacted with the announcement
- **Announcement ID**: the unique identifier for the announcement

The expanded REST API functionality is available now, and we are excited to see the insights our users will gain from this new data.

How to find it

Find more information here: Getting Started with Enduser Events (userlane.com)

ℹ Announcement events are created as a separate API call. It provides you with events and a User ID, if you want additional information about the User ID, please use our EndUser API

CHECK OUR ROADMAP

Release Note - User Segmentation for Tooltips

Last Modified on 29.12.2025

Release demo

Your browser does not support HTML5 video.

What is new

Now you can apply user segmentation to display Tooltips (Hints & Beacons) only to specific target groups.

For more information on user segmentation, please check the following help article.

How to find it

In Editor: Create > New Tooltip or click first on Tooltips icon > Create and select Segmentation

CHECK OUR ROADMAP

Release Note - Showing URL fragments in HEART analytics

Last Modified on 29.12.2025

What is new

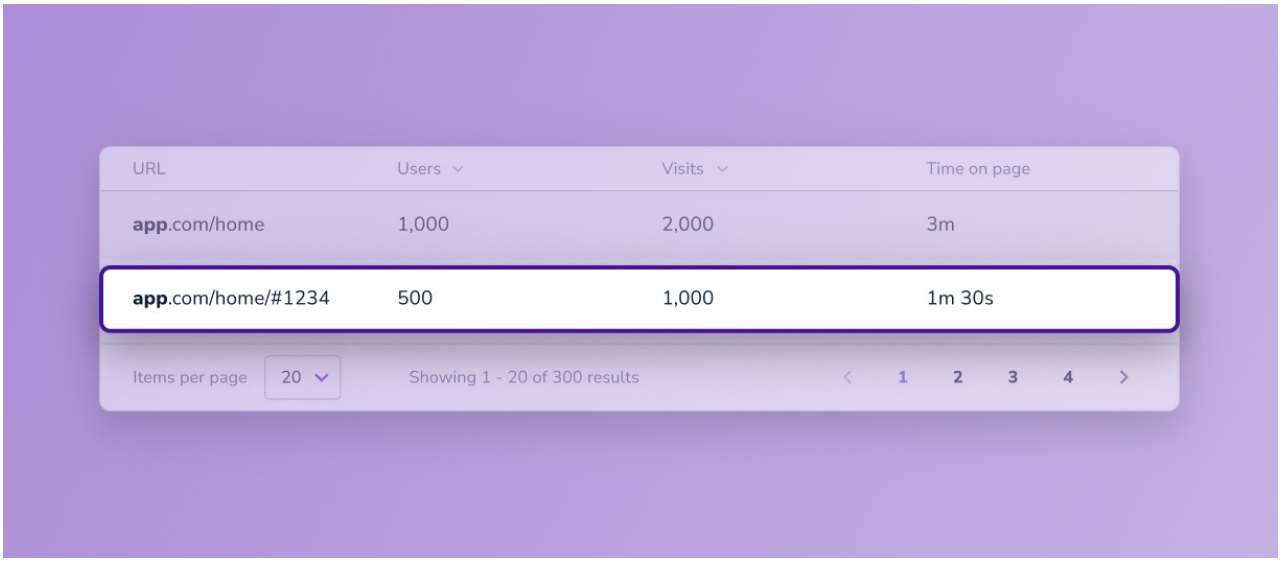
Your application's web addresses were shown in the HEART analytics without the part that comes after the # symbol (also called fragments). HEART analytics now include the fragments too, so you can track which parts of the application are visited. For example, the URL with test.com/#123 will now be fully shown.

How to find it

Adoption and Engagement pages in the HEART analytics.

/analytics/heart/adoption

/analytics/heart/engagement



ℹ Remember that this change is only for the fragments, we still don't display the URL parameters (the part that follows "?").

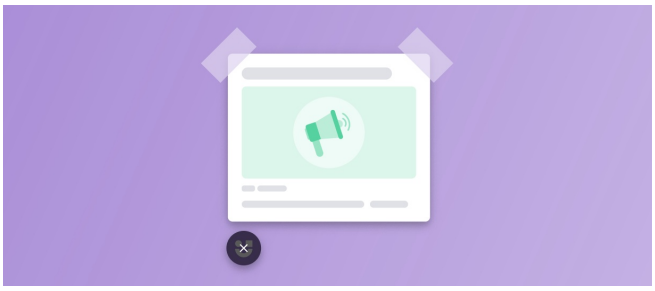
CHECK OUR ROADMAP

Release Note - Improved user interaction experience with NPS

Last Modified on 29.12.2025

What is new

NPS can now be closed only if the user actively engages with them by clicking the Close button.



No action is required from your side, everything is handled by Userlane.

CHECK OUR ROADMAP

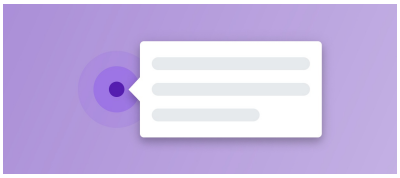
Release Note - Tooltips: Hints & Beacons

Last Modified on 29.12.2025

What is new

We are expanding the use cases for which Tooltips can be used. Managers can now choose the tooltip type: hint or beacon.

Hints are used to **explain** an element to help users complete a process. Beacons are used to **highlight** an element by drawing the user's attention with the help of a pulsating icon.



How to find it

In the Editor: Create > Tooltip > Select element > Choose Tooltip type

CHECK OUR ROADMAP

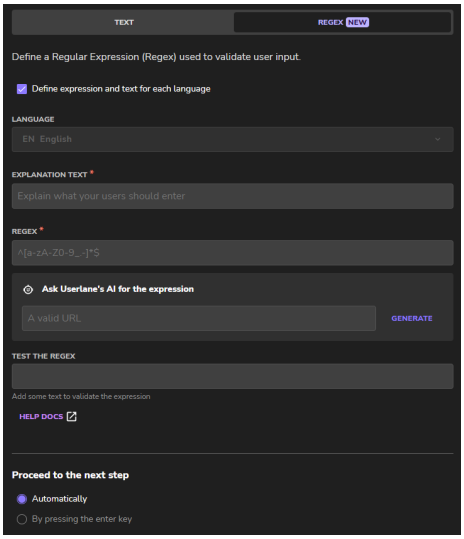
Release note - Assist users when completing tasks by validating inputs

Last Modified on 29.12.2025

What is new

The process of validating data has been done so far with the help of pre-defined texts - the user cannot continue the Guide if the text is not matched.

We have now expanded our data validation capabilities. If a specific value step type is chosen,**regular expressions (regex)** can be used to check if what was typed in a field matches the pre-defined pattern.



For example, you can use regex to ask users to submit expenses only with two decimals, using dot (.) as a decimal separator.

ℹ The Generate button is connected to the OpenAI API service provided by Microsoft. To learn more about the integration, please visit the following help article.

How to find it

In Editor: Record a field > Select specific value step type > click on the Settings button

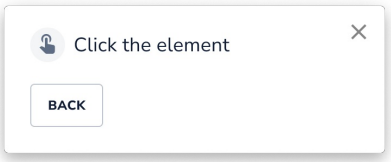
CHECK OUR ROADMAP

Release Note - Step box interaction improvements

Last Modified on 29.12.2025

What is new

The new and improved Guide step design enables end users to interact with the underlying application quickly and easily.



You don’t have to do anything - Userlane will automatically adjust the step boxes following the updated design pattern.

How to find it

In Editor: Access a Guide > Step > Click Step Type

In Portal: Access Customize > Texts > Access each step type

ℹ In case you do not have access to this functionality, please delete your browser cache.

CHECK OUR ROADMAP

Release Note - Tags over time

Last Modified on 29.12.2025

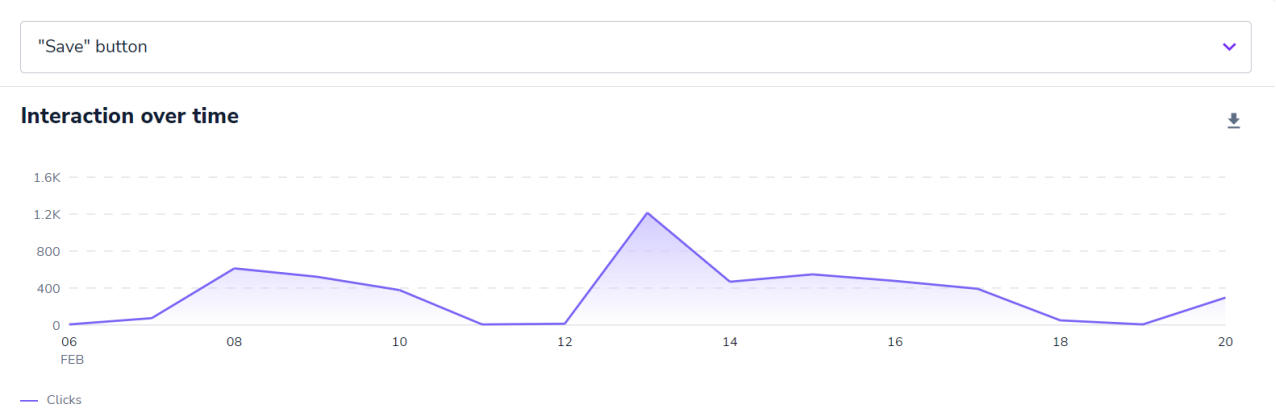
23 March 2023

What is new

The Task success page now includes a time graph that shows how your tags are being used over time. This graph will help you identify when the drop or increase appeared and if it was because of certain actions you took. For example, if you introduced a Tooltip, the usage increased. Previously, the Task success page only showed how many users interacted with your tagged elements.

How to find it

In your Portal go to Analyze > HEART > Task success



ℹ The time graph shows all tags over time by default. However, you can choose an individual tag from the dropdown menu above the graph.

CHECK OUR ROADMAP

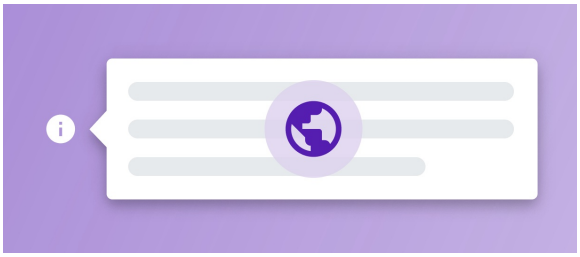
Release Note - Page Segmentation for Tooltips

Last Modified on 29.12.2025

21 March 2023

What is new

Now you can apply page segmentation to Tooltips to provide context-based help for your users.



For more information on how page segmentation works, please check the following wiki section.

Where to find it

In Editor: Create > New Tooltip or click first on Tooltips icon > Create and select Segmentation

CHECK OUR ROADMAP

Release Note - Contact Form in the Assistant

Last Modified on 25.07.2025

14 March 2023

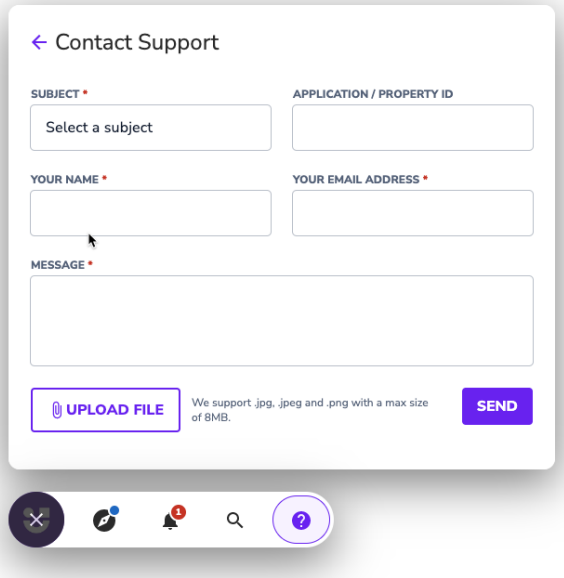
What is new

We have improved the experience of reaching out to our Support Team.

With the new Contact Form you can reach out to the team quicker and also upload files.

How to find it

In Portal: Click on Help > Contact Us or within the Assistant when clicking on Contact Support



CHECK OUR ROADMAP

Release Note - Analytics export to CSV

Last Modified on 29.12.2025

27 February 2023

What is new

We have added an option to export your analytics data directly from the Portal. The export is currently available in CSV.

You can export the graph's data that you see loaded on the page. The downloaded file will have the same date range and segment that you've previously selected in the Portal.

How to find it

In Portal: Analyze > Choose a page and a graph you want to export > Select date and segment > Export icon

ℹ In order to export more rows from the tables, you can now extend the table from 20 to up to 200 rows.

CHECK OUR ROADMAP

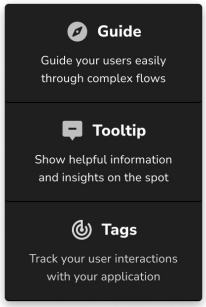
Release Note - Tags

Last Modified on 29.12.2025

14 February 2023

What is new

Tags allow you to track users' interactions with specific elements or features of the underlying application.



The results can be visualized on the Task Success page, which helps you understand whether users are completing predefined processes.

How to find it

In Editor: Create > New Tag or click first on Tags icon > Create

ℹ To learn more about Task Success and HEART analytics, please check the related articles below.

CHECK OUR ROADMAP

Release Note - Task Success

Last Modified on 29.12.2025

14 February 2023

What's new

Now you can easily find out if users are interacting with important parts of your application!

This metric will help you understand if users are interacting with tasks and interesting elements to be aware if users complete tasks or interact with important features easily and efficiently.

This will enable you to tag in your Editor elements you want to track. After tagging we start measuring the usage of the specific elements/features in your underlying app.

When to use this?

For example, you can tag elements like "submit" button, "save", "finish" or anything that indicates an important interaction. With this you will understand:

- What percentage of your user base is doing tasks/interacting with these important elements?
- Are important parts of your app being used?
- How many users interact with your killer feature?

After learning that a part of your application is not used enough, you can promote it with Userlane content options and track if this is changing the usage metrics. This helps in making data-driven decisions, especially if you do not have the possibility to add your own analytics solution to an application.

How to find this?

In Portal: Userlane Portal > Heart analytics > Task success
In Editor: Create > New Tag

CHECK OUR ROADMAP

Release Note - Multi-application analytics

Last Modified on 29.12.2025

14 February 2023

What's new

We've released a dashboard that shows you all your HEART scores and main metrics.

It is a general overview of all the applications/tools that have Userlane's HEART enabled across the business and for each the main metrics can be accessed.

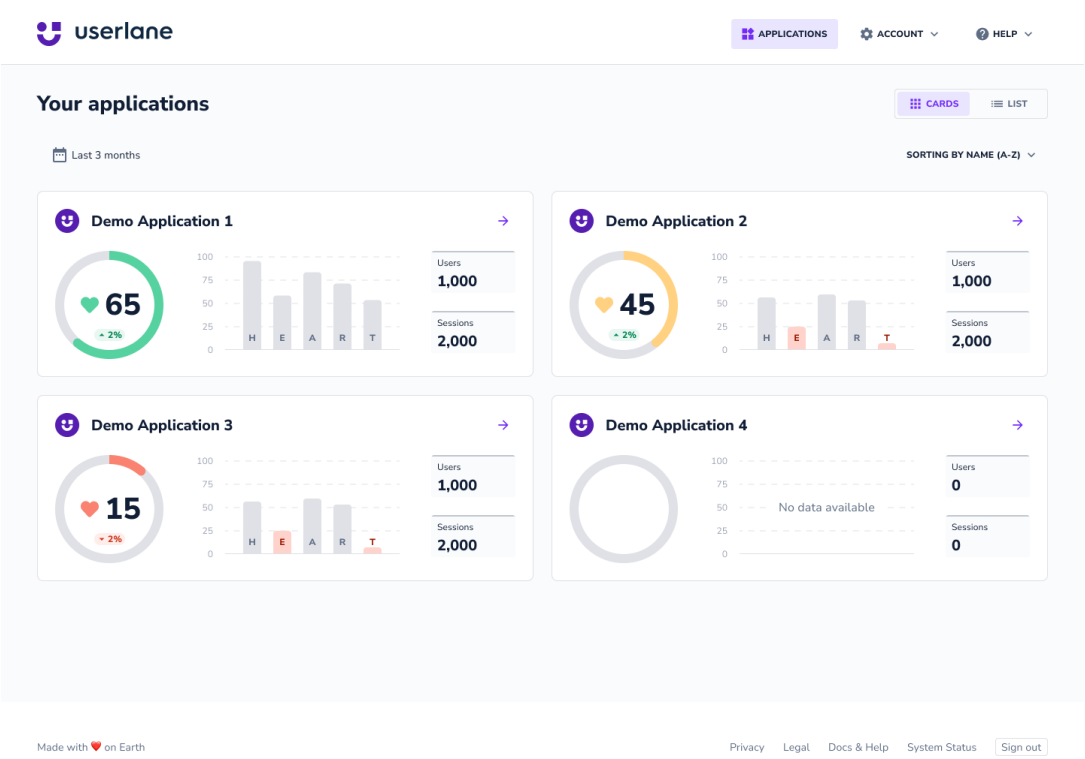
When to use this

It tells you how well different tools are adopted across the business, and where can you focus your attention, budget and energy with leading indicators.

> **ℹ Good to know**
>
> You can sort the cards by name, HEART scores and number of users. The view is available in card or list (table) view.

How to find this

Go to Userlane Portal > Upper navigation button called the "Applications"



CHECK OUR ROADMAP

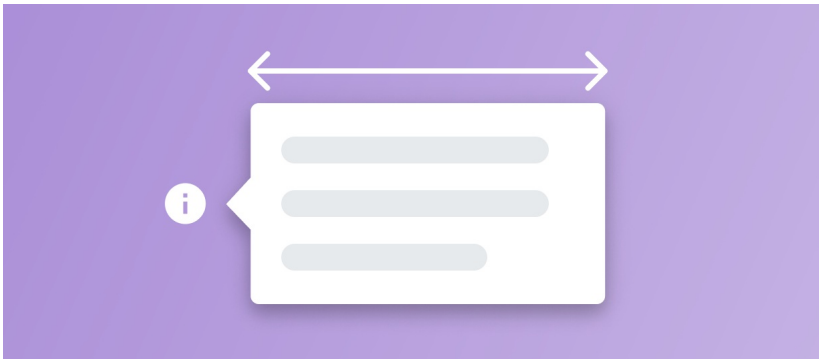
Release Note - Tooltip boxes automatically adjust their size

Last Modified on 29.12.2025

10 January 2023

What's new

A Tooltip is used to provide additional information to the end user. That is why we improved how the Tooltips are displayed based on the amount of text.



Userlane will **automatically** adjust the dimensions of each Tooltip's box to its content and no action is required from you.

CHECK OUR ROADMAP

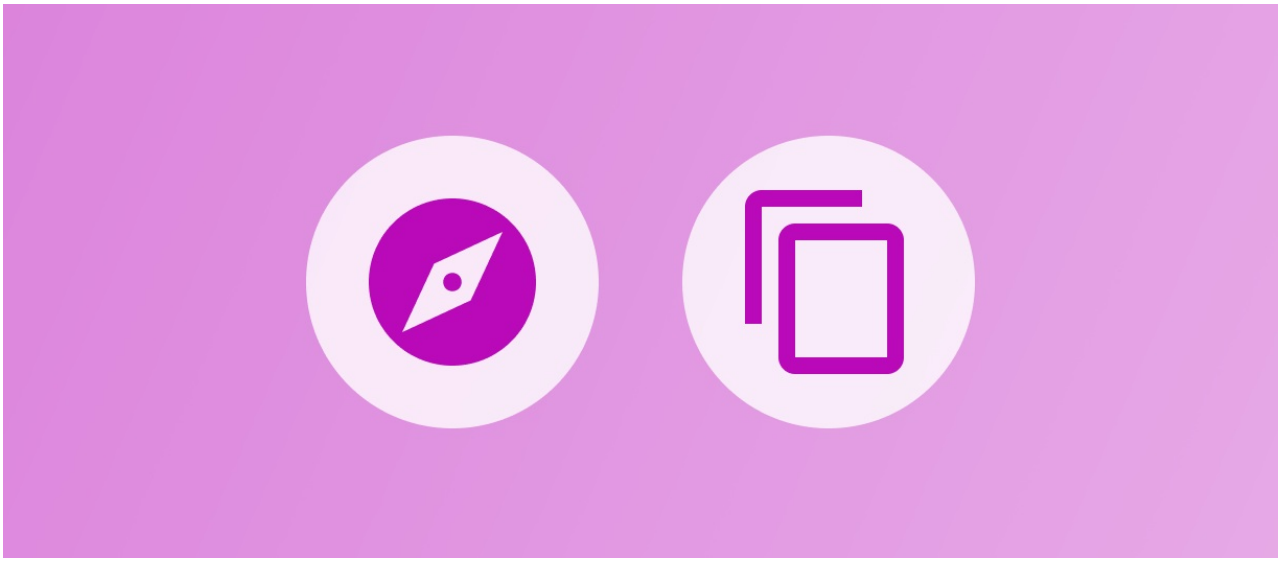
Release Note - Copy Guides between multiple applications

Last Modified on 29.12.2025

05 December 2022

What's new

There is good news for customers who manage multiple similar applications.
We are very excited to announce that Guides can now be copied from one application to another that you have access to.



When to use

- In case you are using a staging environment before any new version release, you can copy the Guides over to the live environment. This allows **fast activation** and **avoids mistakes** in production.
- If you use separate Userlane applications for **different language application** versions (e.g. salesforce Asia versus Salesforce US), now you can create the Guides and copy them over.
- If you manage multiple accounts for a dedicated application you are able to **copy some Guides** over to **another application** to **speed up** the Guide creation process.

Where to find it

You can access this new functionality from Portal > Manage > Guides > Single action menu.

ℹ This is not applicable to self-hosting customers.

Release Note - Manage Single sign-on (SSO) and Browser Extension configuration from the Portal

Last Modified on 29.12.2025

30 November 2022

What's New

There is good news for customers that are using Single sign-on (SSO) and the Browser Extension. It now is possible to manage the configuration for both of these functionalities from within the Portal, without having to wait for Userlane's Customer Support for assistance.

ℹ Single sign-on (SSO) allows your users to authenticate using their company credentials. They do not need to remember multiple credentials.

When to Use

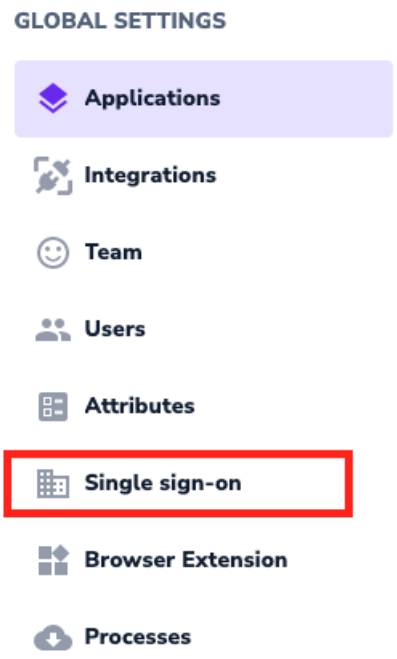
In case you are just setting up Single sign-on (SSO) for your End Users or need to update the configuration, you can now change these settings in the Portal. This allows you to take control of these settings proactively and swiftly.

If you are deploying Userlane with the Browser Extension you can also configure its settings in the Portal.

Where to find it

ℹ SSO and Browser Extension are features that need to be enabled by your Customer Value Manager during setup. Only those will see those configuration options.

You can access this new functionality in the Portal > Account > Global Settings



ℹ SSO is available only for browser extension implementation with Userlane.

Release Note - Guide step boxes automatically adjust their size

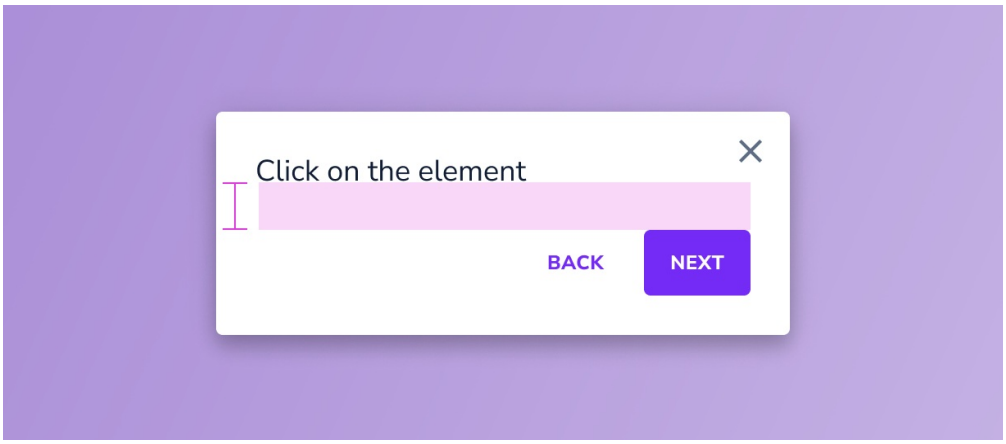
Last Modified on 29.12.2025

17 November 2022

What's new

We have improved the way in which Guide steps are shown to the user.

Userlane will **automatically** adjust the dimensions of each box to its content, as not every step within a Guide requires a lot of text.



ℹ No action is required from your side.

Release Note - Engagement Page

Last Modified on 29.12.2025

18 November 2022

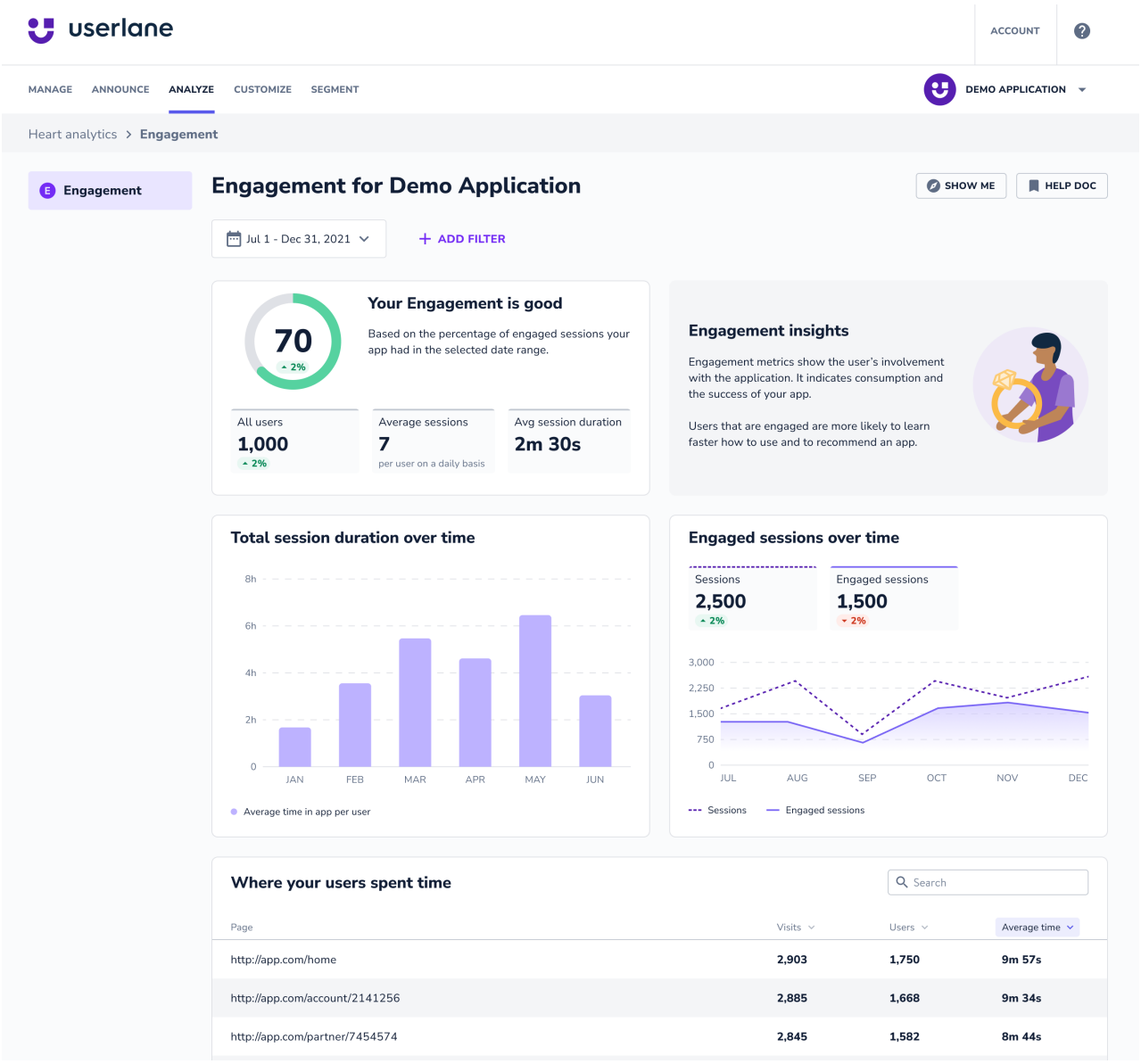
What's New

Within Userlane Analytics you will be able to see new useful metrics on the Engagement page and you can check if the users actively engage and interact with your application.

Where to find it

Sign into Portal > Analyze > Heart Analytics > Engagement

In more detail, engagement metrics show the user's involvement with the application by tracking how many engaged sessions they had. This metric will also present how much time on average users spent and how much time they spend on each part of an application.



Release Note - Adoption Page

Last Modified on 29.12.2025

07 November 2022

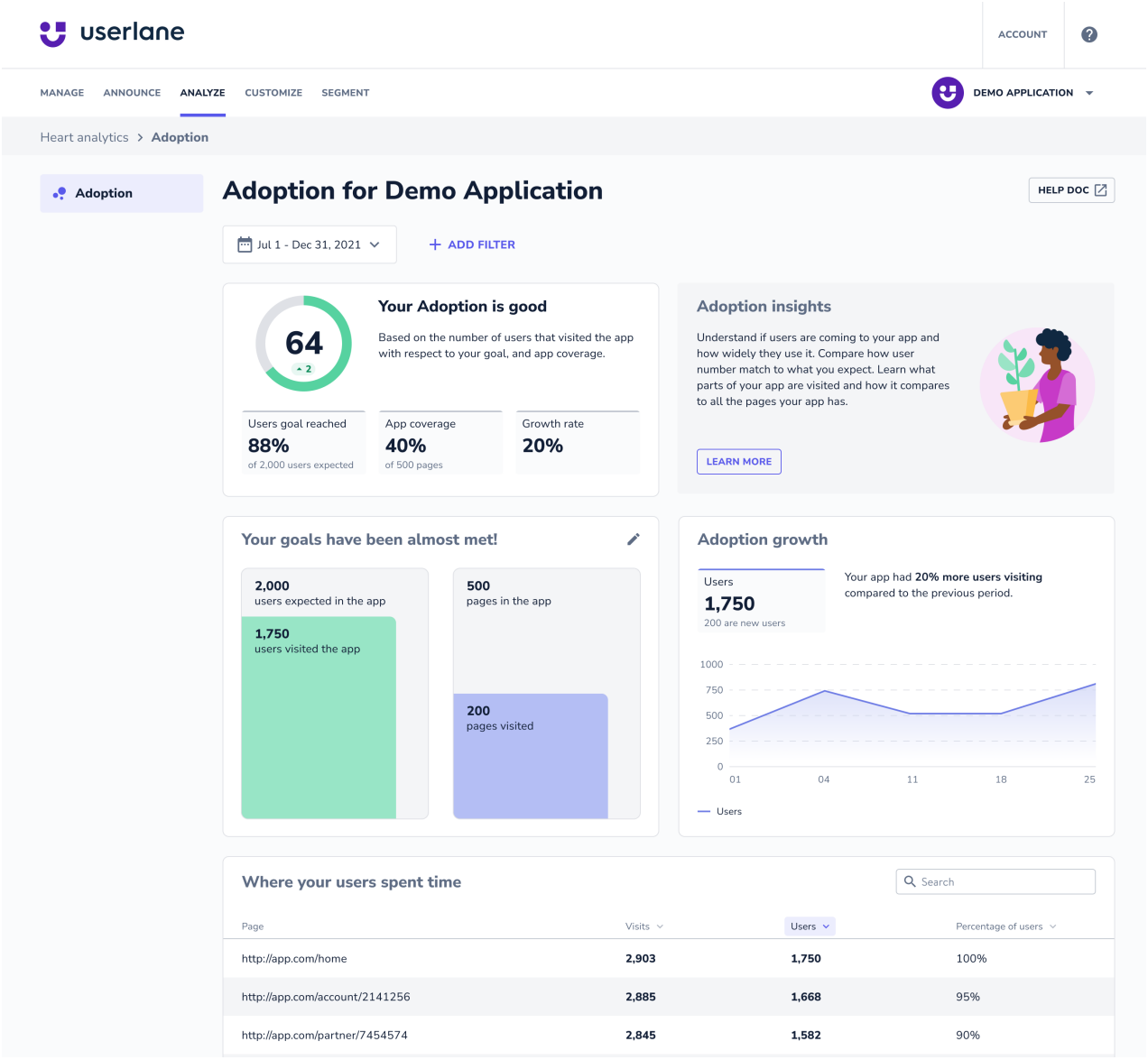
What's new

Within Userlane Analytics you will be able to see new useful metrics in the Adoption page, now you would be able to check how many (expected) users are visiting your application and how widely they use.

How to find it

Sign into Portal > Analyze > Heart Analytics > Adoption

In more details, the user number is the key metric you need to measure. With this metric, you can see how many users arrived and you can track this number compared to the ratio of the expected number of users. You will also see the percentage of new users and you will be able to understand if your users are declining or if they are remaining stable or growing. Thus, with this metric, you would be able to understand your application's coverage and how widely users use it.



http://app.com/attributes/645875689	**2,616**	**1,354**	77%
http://app.com/account/124125	**2,367**	**1,275**	72%
http://app.com/process/745749	**1,983**	**1,245**	71%
http://app.com/manage/1258923	**1,460**	**1,216**	69%
http://app.com/account/214565	**1,440**	**1,103**	63%
http://app.com/profile/412356	**1,397**	**1,099**	62%
http://app.com/sales/5686759	**633**	**1,091**	62%
http://app.com/customer/8452452	**1,304**	**876**	50%
http://app.com/account/125765856	**1,116**	**786**	72%
http://app.com/segments/574526	**1,069**	**746**	45%
http://app.com/setup/867967	**1,050**	**723**	41%
http://app.com/process/137697	**1,006**	**661**	38%
http://app.com/process/764507	**998**	**149**	9%
http://app.com/guide/5643643	**909**	**621**	35%
http://app.com/account	**103**	**325**	19%
http://app.com/setup/66547	**869**	**337**	19%
http://app.com/account/074845	**467**	**177**	7%

Showing 1 - 20 of 278 results

‹ 1 2 3 4 ••• 10 ›

ℹ For getting access to the Adoption page under your Analyze tab, please contact your Customer Value Manager.

Release note - Analytics Data up to one year

Last Modified on 29.12.2025

22 June 2022

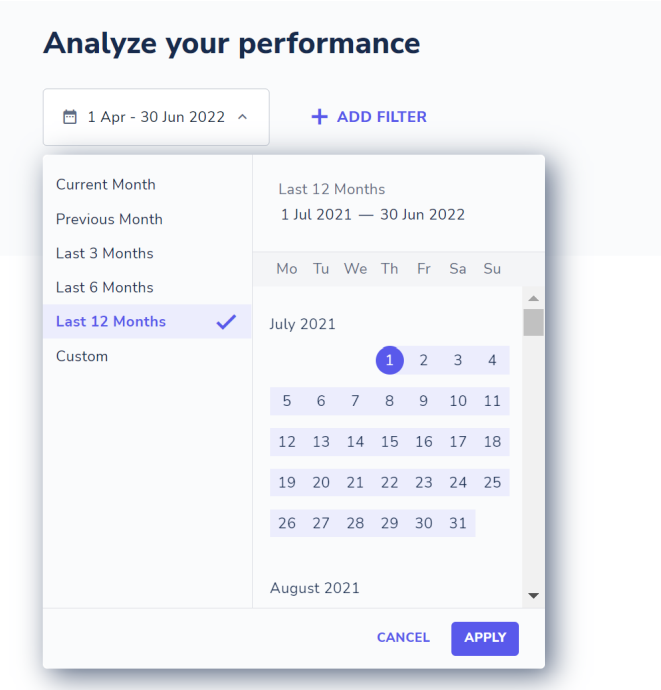
What's new?

We have listened to your feedback that six months of data were not enough to evaluate Userlane's performance.

Based on this, we have expanded the time frame for the Analytics data. Now, you have the possibility to see data back to **one year** in your Userlane Analytics.

How to find this?

Go to your Userlane Portal > Analyze > Click on the calendar dropdown > Last 12 months.



Release Note - Retention Page

Last Modified on 29.12.2025

07 November 2022

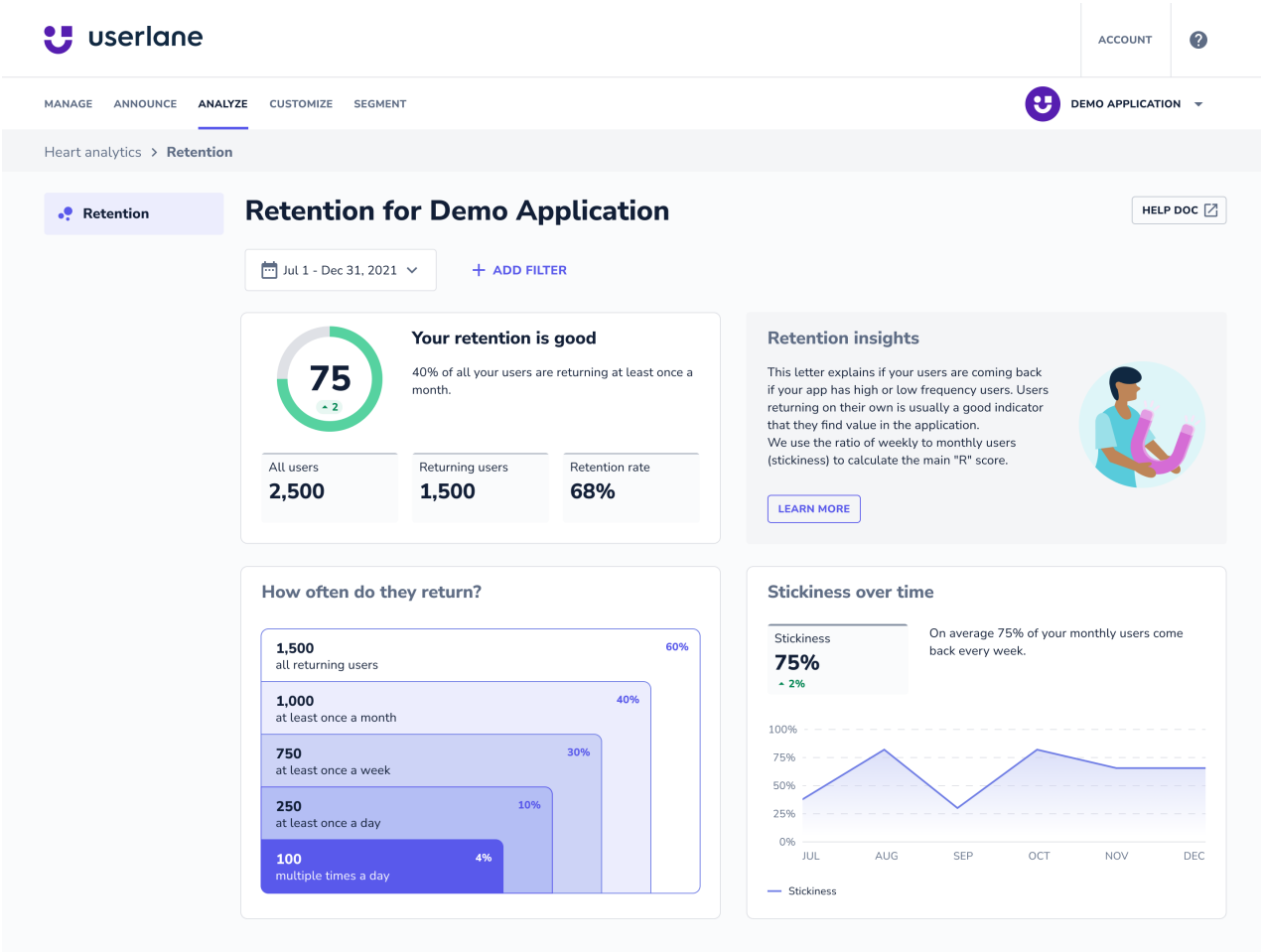
What is new

Now you can check if the users continue utilizing the application and if they keep coming back.

Retention metric tracks how likely your users are to return to your application with metrics like stickiness, retention rate, or percentage of high-frequency users.

How to find it

Sign into Portal > Analyze > Heart Analytics > Retention



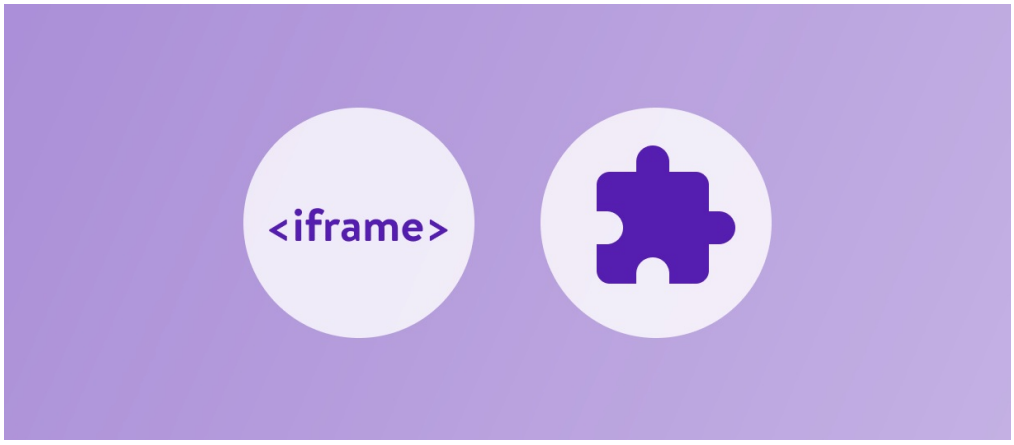
ℹ For getting access to the Retention page under your Analyze tab, please contact your Customer Value Manager.

Release Note - Cross Origin iFrame support for Userlane Browser Extension

Last Modified on 29.12.2025

16 November 2022

Some web applications use iFrames to render content from other sources. We call these "cross-origin iFrames".



What's New

We have improved the Userlane selector algorithm to support the selection of elements within a cross-origin iFrame for both Snippet and Browser Extension implementations.

To find out more about Cross-Origin iFrame support in Userlane, please check here.

Release Note - Drag & Drop Steps

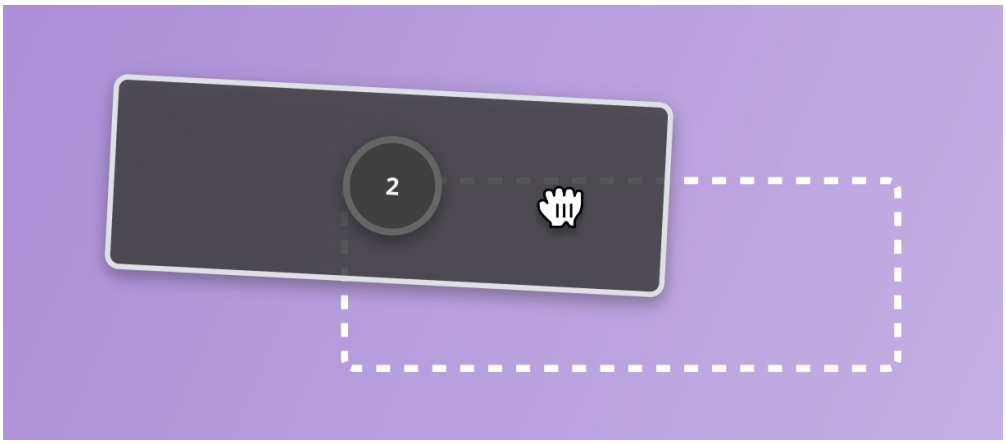
Last Modified on 29.12.2025

14 November 2022

What's new

Now you can drag and drop steps within a Guide in Editor. In case that you need to change the order of a Guide or you just made a mistake now easily you can move the step and change the order.

Restructure a Guide fast and easily by moving steps via drag and drop.



How to do this:

Start Editor > Open the editing mode of the Guide that you need to adjust > just start dragging and dropping steps.

In case you do not have access to this functionality, please delete your browser cache.

Release Note - NPS

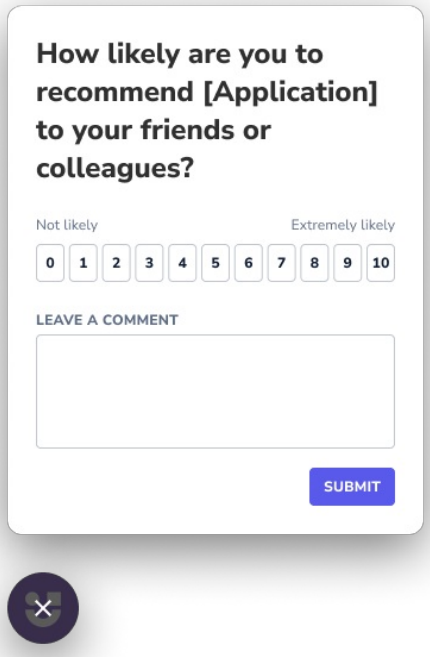
Last Modified on 29.12.2025

18 October 2022

What's New

NPS stands for **Net Promoter Score, a** metric used in customer experience. NPS measures the loyalty of your users and how likely they are to recommend your application to other users.

Now you can measure your NPS with Userlane added to where your users are - inside your application. Userlane now provides you with the tool to **set up** and **automate** your NPS and your users can choose a range from 0-10.



Check out this article to learn more about NPS and how to set up NPS with Userlane. As well as our best practices article.

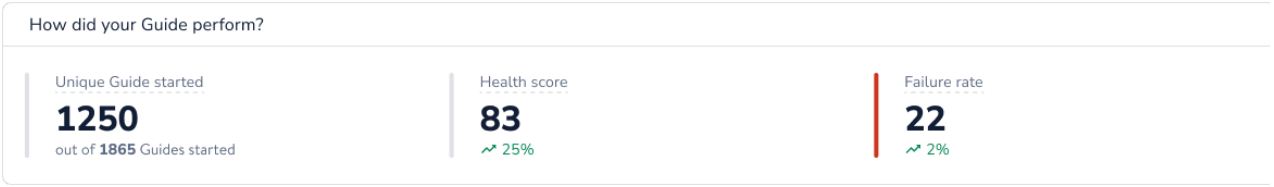
Release Note - Understand your Guides' performance with a new metric: failure rate

Last Modified on 29.12.2025

21 December 2022

What's New

We have added a new metric that is called Failure rate and you will find it in your step details report for you to prioritize better what needs to be fixed within your Guides.



In case you deal with multiple steps errors, we understand that it could be hard to prioritize what error to fix first. We wanted to provide you with some valuable information metrics to assist you with prioritization and for that reason, we created the failure rate metric. As well as, you can check per step how many users left the Guide due to an error.

Failure rate: It's the percentage of users that leave a Guide because of an error, in ratio to all users that started the Guide.

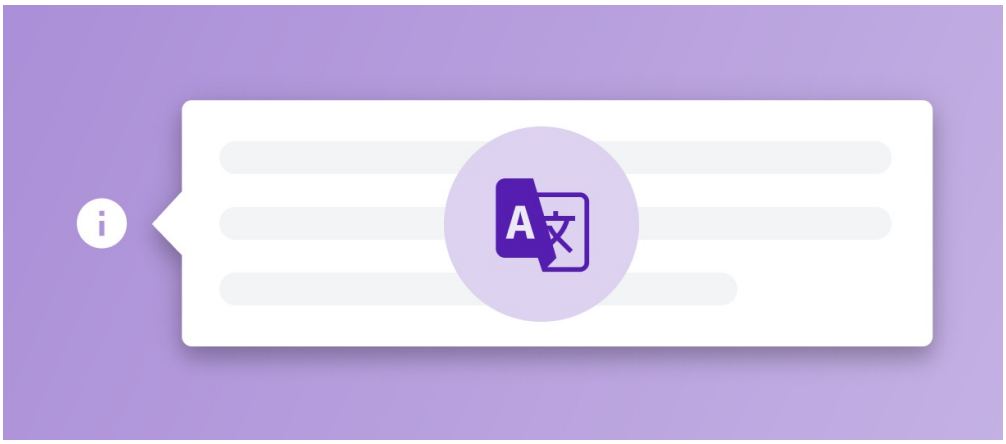
Release Note - Tooltips Language Translation

Last Modified on 29.12.2025

10 October 2022

What's New

Now you can translate your Tooltips' text by exporting and importing the global translation file (which can be downloaded in CSV or XLSX format).



How to do this?

You can translate your Tooltips' text in Userlane Portal:

Sign into Portal > Customize > Languages > Press Export/Import Text > Select file export Format

Then, *add the Tooltip text in the file in the preferred language > Import the file back to Userlane using the Export/Import Text functionality.*

Release Note - SharePoint Integration

Last Modified on 29.12.2025

21 September 2022

What's New

We have implemented our SharePoint integration, our latest offering to our integrations feature. Now your users can access your SharePoint content directly from the Userlane Assistant.

Where to find it

You can access our Integrations page from the Userlane Portal by selecting **Account > Global Settings > Integrations**. See our SharePoint integration article to learn how to set it up.

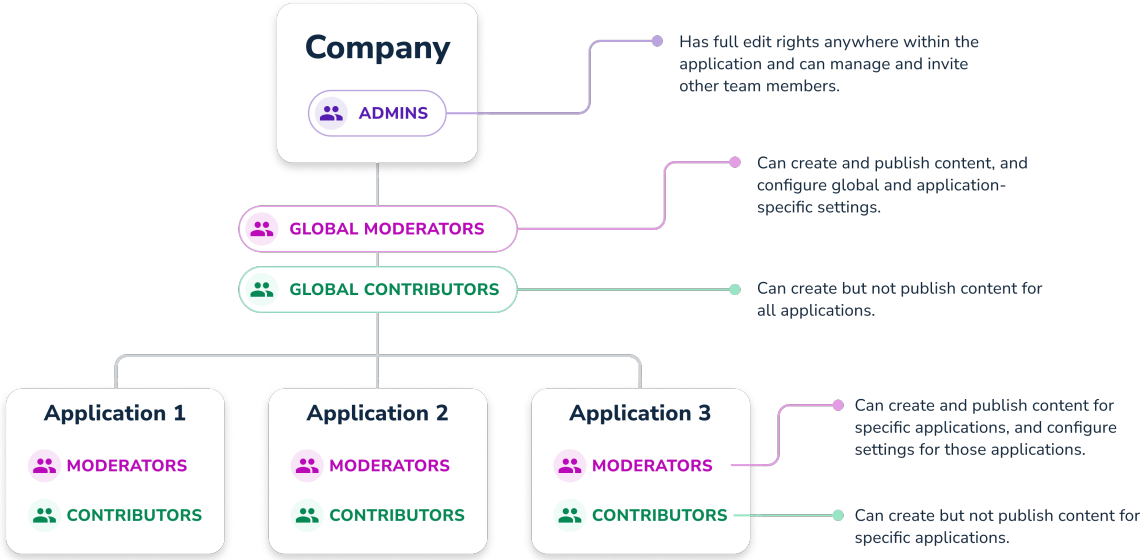
Release Note - global vs. application roles

Last Modified on 29.12.2025

25 August 2022

What's New

Now the admins have the option to assign moderators and contributors of the company to all applications or to a number of applications. Therefore, moderators and contributors, if required, get access and edit rights only to specific applications and not the whole company.



Benefits:

- Manage more applications within one company without running into permission issues across these applications.
- Assign the proper access to each application expert to avoid any potential risk.

ℹ Check out the User role article for further information.

Release Note - Manage languages for Tooltips

Last Modified on 29.12.2025

19 August 2022

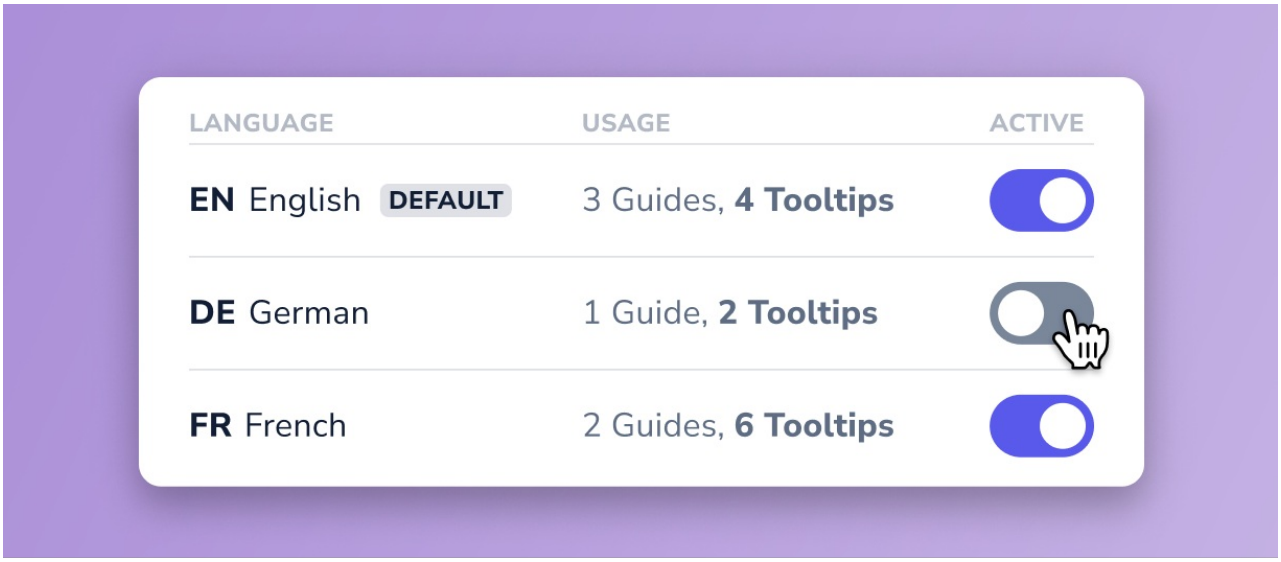
What's New

Now you can see the usage of Tooltips per language in your Portal.

How to check this?

To get an overview of how many Tooltips are published in a language:

Log in to Portal > Customize > Languages > check "your language" Report.



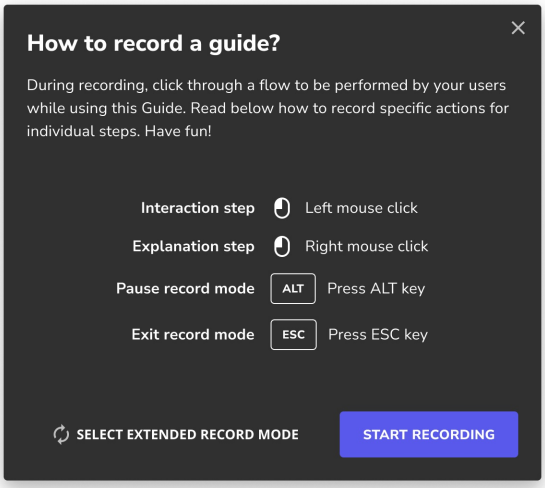
Release Note - Use Pause in all Record Modes

Last Modified on 10.03.2026

15 August 2022

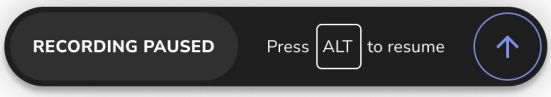
What's new

We are very excited to announce that our pause mode is now available for both record modes and Tooltips. We have introduced a simpler pause mode experience for content creators.



How to use

Now, if you need to pause during the recording of any Guide or Tooltip **press the ALT key (or Option for Mac),** and the recording will pause. To leave the pause mode, **press again the ALT key (or Option for Mac)** to get back to the record mode.



Release Note - End User SSO: Updating User Profiles

Last Modified on 29.12.2025

05 August 2022

What is New

This is an update for customers who have **single sign-on enabled** for their end users and **user attributes mapped** between their active directory and Userlane.

From now on those attributes and their values will automatically be synchronized on a fortnight basis. Consequently, if an update happens to any of the attributes (or values) in the active directory, the change will also be updated in the relevant user profiles in Userlane.

This will allow you to automatically allocate the matching user segments to your users, based on the latest profile changes.

ℹ Keep in mind that this change could impact the existing attributes whenever users authenticate via SSO the next time, especially if those attributes have changed from the last time they got updated.

Release Note - Tooltip reposition

Last Modified on 29.12.2025

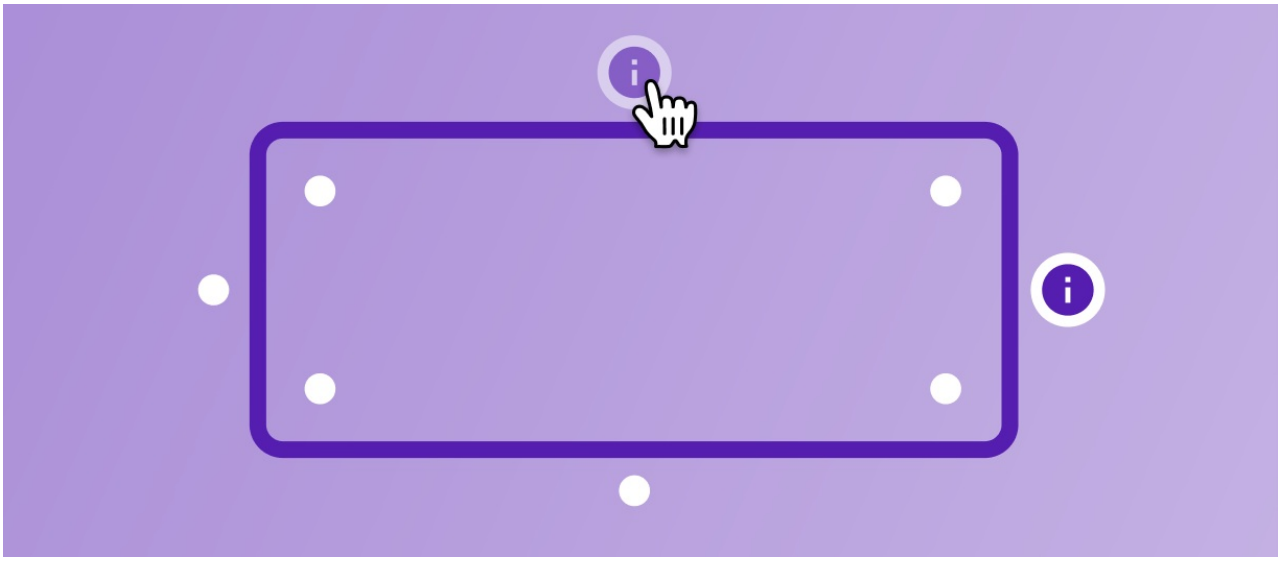
20 June 2022

What's new?

We have listened to your feedback that you would like to choose where your tooltips sit. We have enabled the option to adjust the position of your tooltips and place them in different 8 spots.

Now you can:

- Use the Auto option to let Userlane select the icon position for you, or select Manual to pick the icon position yourself.
- Manually select the icon position from eight positions, including four internal ones.



Try this out now!

Release Note - Tooltips (Beta)

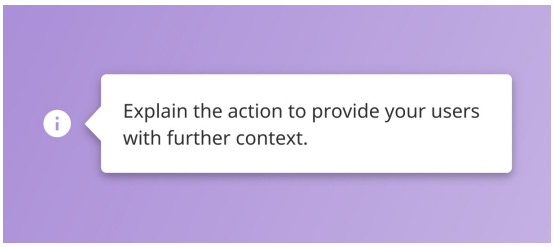
Last Modified on 29.12.2025

27 April 2022

What's new?

Here we are with another great addition on how to create helpful content for your users. Here we are with another great addition on how to create helpful content for your users. In addition to **Guides** and **Announcements,** you now have the option to create a new content type called**Tooltips**.

What is it?



Tooltips allow you to explain elements of the underlying application. Tooltips can be attached to any element of the underline application. They provide descriptions or explanations for their paired element, without the need to use other lengthy manuals or further documentation.

With **tooltips**, you can add additional information to an element such as a button or a form. You can support your users whilst they are working, by informing them what happens next, what something means, or how something works without disrupting the flow of using the underline app.

What does this mean?

- For users, this means there will be additional valuable info shown when hovering over the respective element.
- For you, we designed tooltips in a way that ensures they are easier and faster to create, with no code required and creatable in a few clicks within the Editor

What to expect?

We are releasing Tooltips as a Beta to you, meaning we are still adding and tweaking functionality. Our aim is to create the most valuable and enjoyable experience for you. Tooltips are fully functional and here to stay, and there is more to come. Check out this article to learn how to create Tooltips.

Release Note - New Editing Experience

Last Modified on 29.12.2025

19 April 2022

What's new

We are very excited to be releasing a completely **new editing experience** for all our users, the week following the Easter holidays.

The most visible change is that the Editor and content overview are now being displayed more intuitively along the left-hand side of the screen, from where it can be moved to the right-hand side.

Benefits

- The new engine will help with more speed on our development and faster and more intuitive content creation for you (preview from step, updated recording button).
- The new structure that displays the content overview vertically (left aligned) also means that you now scroll down when working on a Guide with many steps. Also, this leads to higher scalability with new content types and functionality to be released soon (e.g. tooltips)
- Better navigation and organization (search bar, list view, segment info, language publishing info).

Additions

Small UI changes for a better user experience when it comes to organizing, searching for, and managing your Guides.

- **Search function:** users will be able to find all existing Guides in an improved overview design.
- **Hamburger menu:** Guides will be displayed within the familiar chapter structure where you can delete and duplicate a Guide or jump straight to the Guide analytics within the Userlane Portal.
- **New list view:** allows you to display all your Guides, regardless of chapter structure, in a list that can be sorted by status, the date it was last updated, or the title.
- **Re-designed the record button:** this will allow an easier recording and scanning of the content.
- **Code selector:** has received technical enhancements, including an automated code check which will ensure your custom code is correct and displayed as expected, plus the ability to reselect elements.

Current Limitations (Browser Extension Users only):

Editing is currently not possible in **Firefox** via the Userlane browser extension. You may not be able to create, preview, and modify new or existing Guides and Tooltips. Our teams are currently working to resolve this issue.

Workaround: Use another supported browser (e.g. Google Chrome) to edit content.

What to expect?

Upon beta tests, we have confirmed that the changes have greatly improved user experience and Guide building processes. Thus, the new changes will be rolled out for all our users soon. Stay tuned!

Release Note - UX improvements within Guides

Last Modified on 29.12.2025

21 March 2022

What's New

We have released the **UX improvement to the step analytics** to provide you with more insights into **user engagement and Guides' performance**.

The **step details page** will show the **number of users** that have reached each step in the Guide. Adding to the existing metrics of how many times any step was shown, you will also see how many unique users saw any step in the selected period or for the selected user segment.

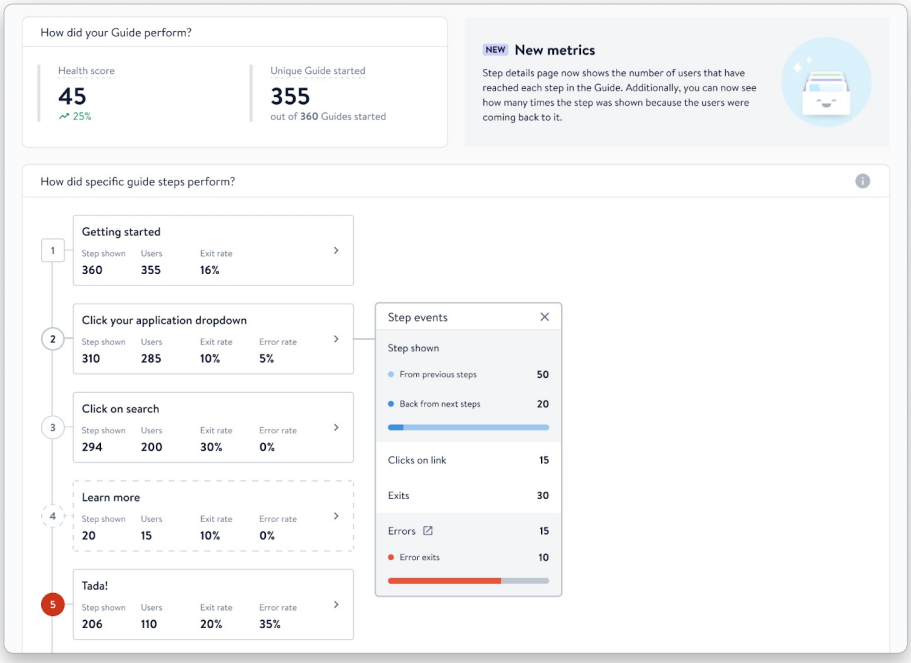
New metrics added:

- **Users:** Number of users that reached each step.
- **From previous steps:** Value indicates how many times a step was shown following previous steps.
- **Back from next steps:** Value indicates how many times a step was shown when users went to a previous step.
- **Skips:** Value indicates how many times an optional step was skipped.
- **Error exits:** Guide exits due to occurring errors.

i You will be able to check how many users reached or dropped off on a certain step. If many users drop your Guide(s) then that's a clear sign to review the content or reassess the complexity of your Guide(s).

Where is this located?

These new metrics can be found **within the step details section** of the Guides' performance analytics page.



ℹ These changes are effective on all properties that are on the EU cluster setup. We are working now on getting these changes to the US cluster as well.

Release Note - Avatar Reposition

Last Modified on 29.12.2025

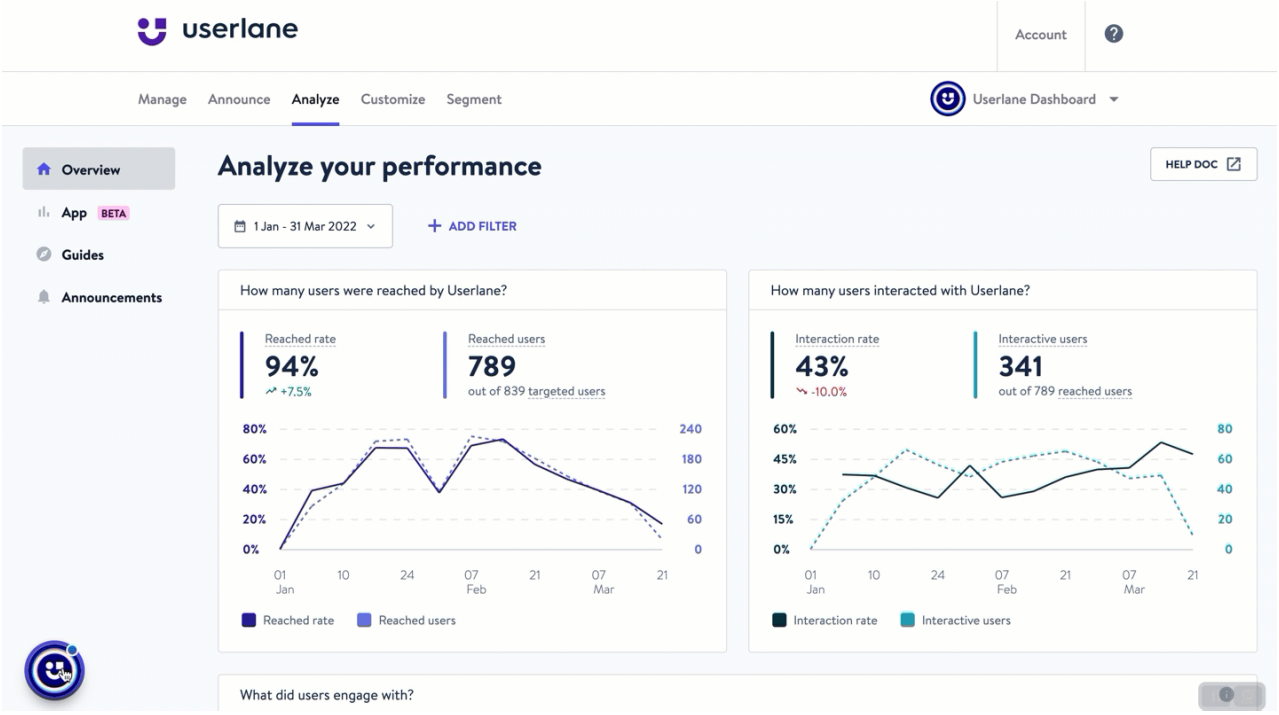
17 March 2022

What's new

Now end-users are able to **move the Assistant avatar.**

Avatar Reposition lets your end-users move the Assistant avatar whenever it conflicts with your application's UI.

End-Users can hover over the Assistant avatar until their mouse pointer switches into a different crosshair control. At that point, they can click-hold, then drag-and-drop the avatar from one of six different spots on the screen to another.



Then, the avatar position will **remain in the selected position** until the user drags it into another one, or until the feature is turned off for the property.

To enable this:

Go to **Portal > Customize > Assistant > ALLOW USERS TO REPOSITION AVATAR.**

ALLOW USERS TO REPOSITION AVATAR

MOVABLE AVATAR



ABOUT

Avatar mobility lets your end-users to reposition the Assistant avatar whenever it conflicts with your application's UI. Users can move the avatar to one of the corners, to the bottom-center, or top-center of the screen.

Release note - Customize Help image

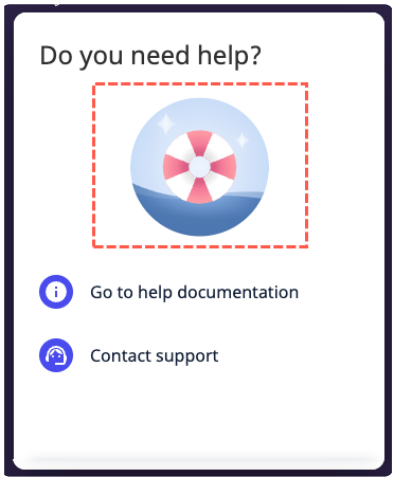
Last Modified on 29.12.2025

21 January 2022

What's new

You can now **customize the image** in our Assistant Help feature.

If you offer your users additional support with Userlane's Assistant Help feature, you can display a custom image instead of the default Help image.



To change the Help image:

1. Go to **Customize** > **Design** in the Portal.
2. Locate *Help Desk* in the right sidebar.
3. Click **Upload** Image.
4. Drag an image file to the upload window or click **Select File** to choose an image from a storage folder. A preview of the Help window display.
5. Click **Save Your Changes**.

> ℹ You can upload a PNG, JPEG, or GIF file with a maximum size of 8MB. The recommended image proportions are a 4:2 ratio and 652x320px resolution. See more about how Userlane renders your images in our Working with images article.

If you haven't enabled a Help link for your users, why wait? Discover how you can easily support your users directly from your application.

Release note - Dashboard renaming

Last Modified on 29.12.2025

19 November 2021

Introducing the Userlane Portal

In line with our latest UX improvements, we have introduced a new name for the Userlane Dashboard.

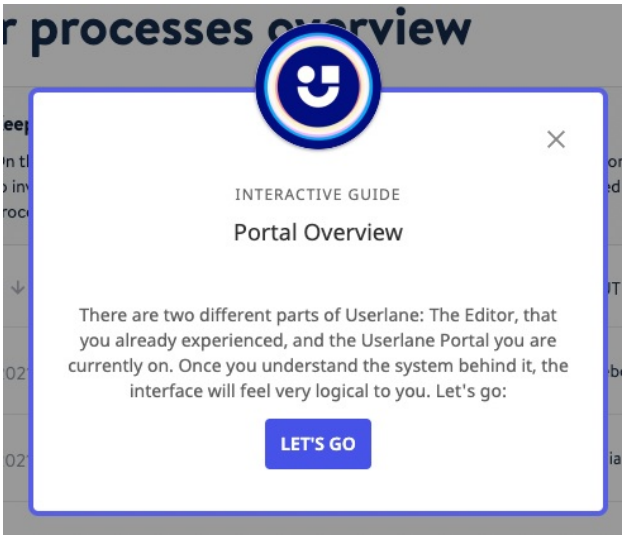
Why have we made this change?

We always strive to deliver an exceptional, user-friendly, and easy-to-navigate product for you! This change was one way we could be better and we hope that you agree.

What's changed?

You will now see Portal in place of Dashboard in:

- Interactive Guides
- Help Center articles
- Blogs and Sales & Marketing material



What hasn't changed?

Userlane's Analytics remains your Analytics Dashboard and is still located under the **Analyze** tab of the Portal.

What's next?

In the coming weeks, we will implement 'Portal' throughout the Userlane experience, specifically:

- Labels and headers in the browser
- Labels in the Editor
- Buttons and links that navigate to the Portal
- References in tooltips

Release note - KnowledgeOwl integration

Last Modified on 29.12.2025

11 November 2021

What's new

KnowledgeOwl integration

We are happy to announce our latest knowledge base integration: KnowledgeOwl. Now your users can access your KnowledgeOwl content directly from the Userlane Assistant.

Where to find it

You can access our Integrations page from the Userlane Portal by selecting **Account > Global Settings > Integrations**. See our KnowledgeOwl integrations article to learn more.

See also

Search through the Userlane Assistant

Release note - UX improvements

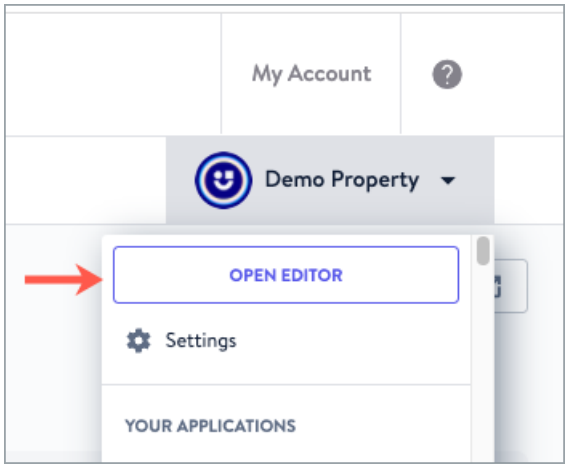
Last Modified on 29.12.2025

02 November 2021

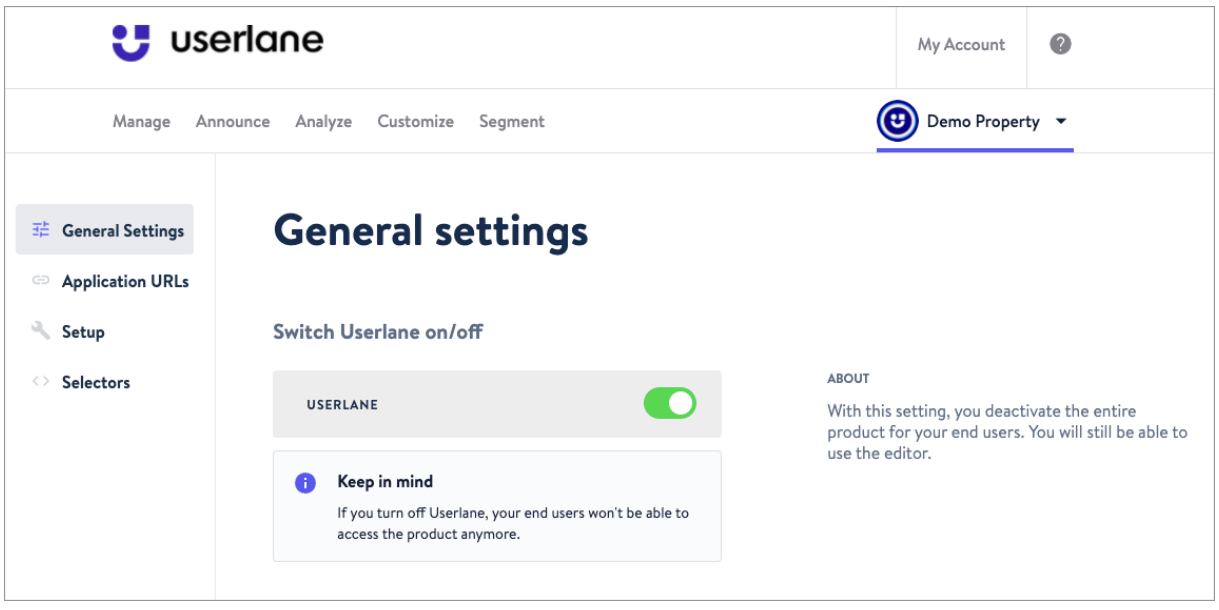
UX improvements

We have released the following **UX improvements** to the Userlane Portal to make it easier for you to navigate to relevant features and better distinguish company account settings from individual applications.

- An application drop-down menu has been introduced.
- The **Open Editor** button is now located in the *new* application drop-down menu.



- A *Settings* page has been introduced at the application level to organize those settings that were previously located under Customize > General Settings and under My Account.



- The **text import/export** feature has been moved to **Customize > Languages.**
- The **generate an API token** feature has been moved to **Account > Personal Profile > API token.**

Release note - Zendesk integration

Last Modified on 29.12.2025

05 October 2021

What's new

Zendesk integration

As promised, we have implemented our Zendesk integration, our latest offering to our integrations feature. Now your users can access your Zendesk content directly from the Userlane Assistant.

Where to find it

You can access our Integrations page from the Userlane Portal by selecting **Account > Global Settings > Integrations**. See our Zendesk integrations article to learn more.

Related articles

Search through the Userlane Assistant

Release note - Integrations page

Last Modified on 29.12.2025

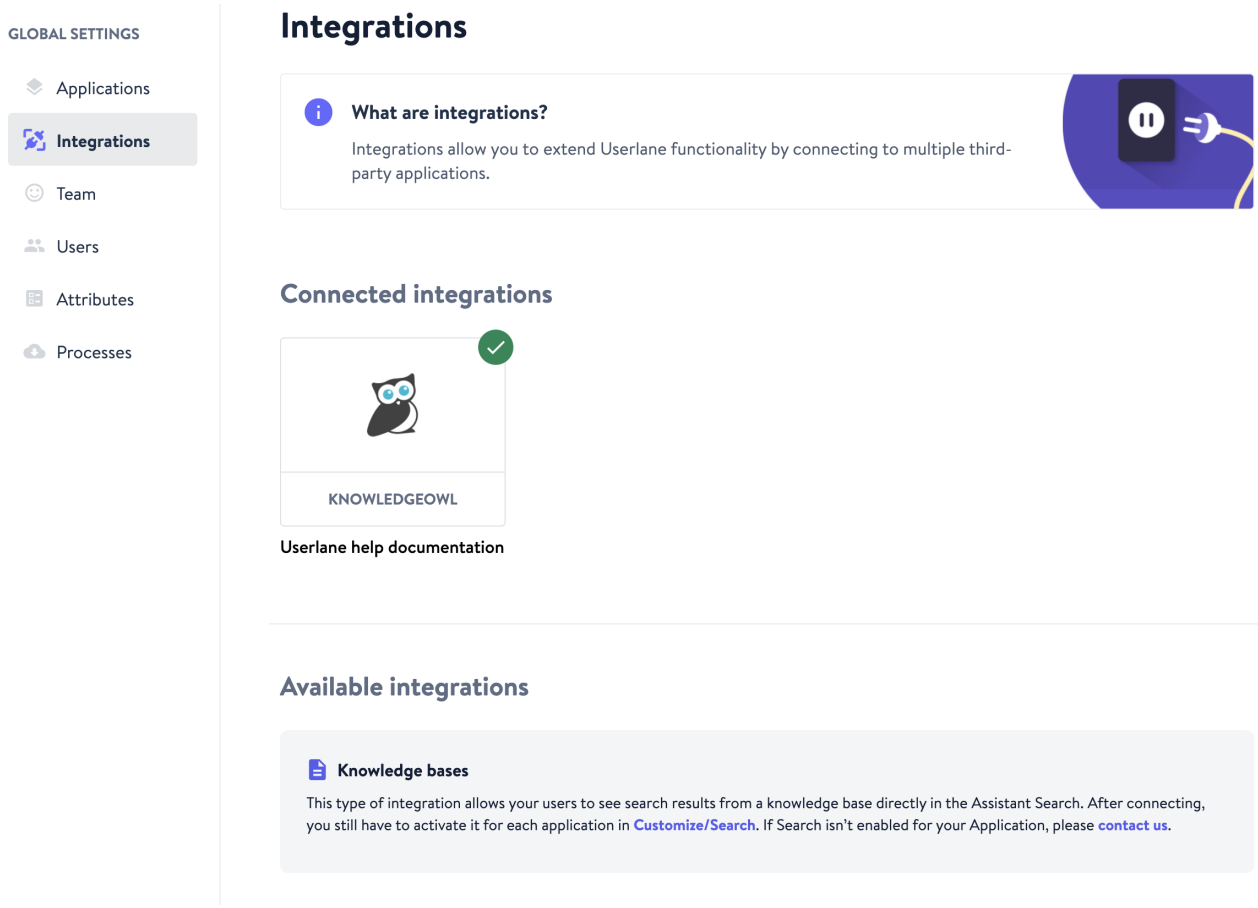
29 September 2021

What's new

Your Userlane solution can now be integrated with your organization's knowledge base or collaboration tool, making its content more discoverable and easier to access. Simply set up the integration, then enable the connection for the Search feature of the Userlane Assistant.

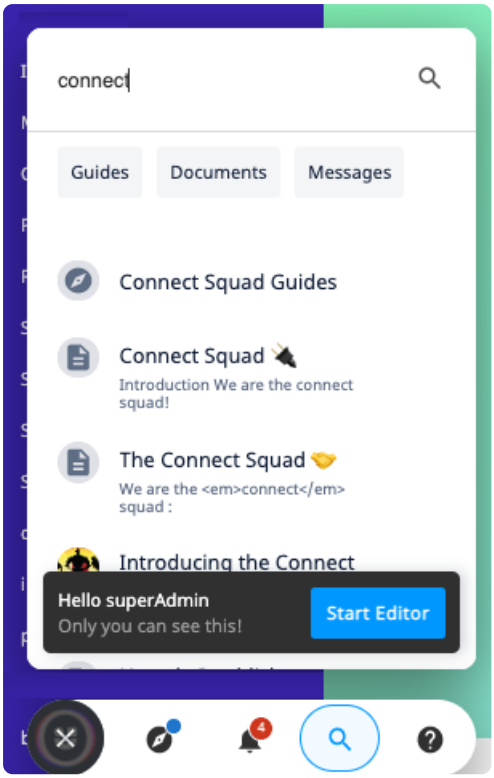
Where to find it

We have introduced a new *Integrations* page to the Portal under **Account > Global Settings**:



ℹ If you have an existing Userlane account (activated prior to August 6, 2021), you first need to contact your Userlane Customer Value Manager to enable your access to the integration feature.

Assistant search results for an enabled connection



If you have not already enabled the Search feature for your users, you can learn more about its benefits in our Search through the Userlane Assistant article.

Supported platforms

Confluence (Since August 6, 2021)
Zendesk (coming soon)

Don't see your platform here? We are committed to supporting integrations with your favorite enterprise systems. If you would like to see yours featured in our ambitious roadmap, let us know!

Release note - error-alert notifications

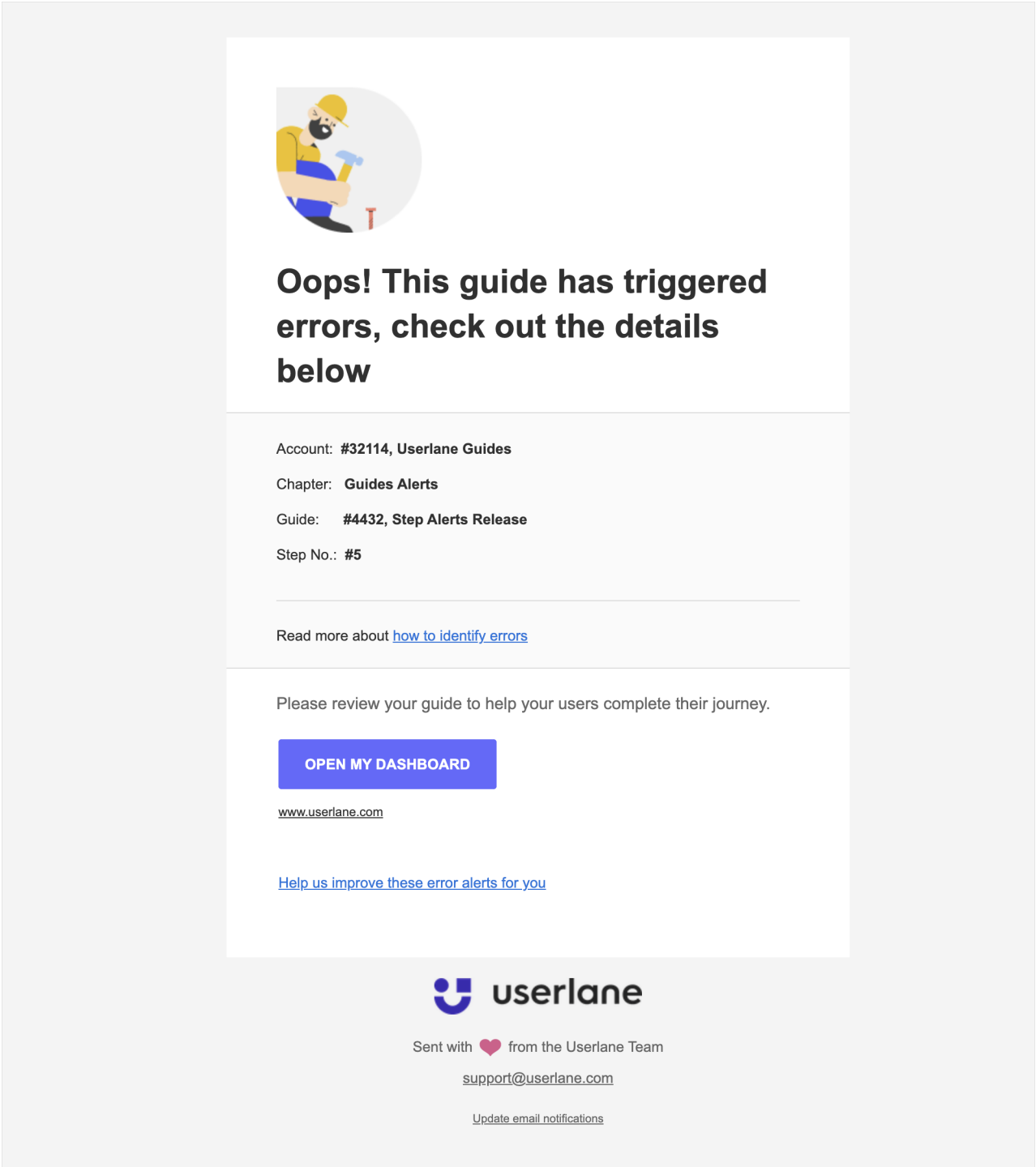
Last Modified on 29.12.2025

08 April 2021

What's New

Whenever an interactive guide breaks on a regular basis in a specific step, an alert is triggered within your Portal.

From April 8th on, you will receive an update on this similar to this one:



What is the benefit of having notifications?

It allows you to quickly review and update your guides to ensure your end-users can successfully complete a guide. Email notifications are also the fastest way to keep you informed.

What does the email include?

The email includes information on

- the account of the Guide
- the chapter

- the Guide
- the specific step number

How often will I receive this email?

The error-alert notifications are sent only when one step experiences multiple errors based on the threshold settings you have set up with your Customer Success Manager or our support team.

The threshold settings are based on the **'x' number of errors** that have occurred during a **time span of** 'y'.

For example: if your property's threshold is set to **12 errors within 8 hours** then the below email will be sent to you every time a step within any guide faces 12 errors in the span of 8 hours.

Good to know:

- You can change whether you want to receive such notifications or not within your Userlane Portal under **Account > Personal Profile > Notifications**

- If you want to have your threshold changed, please reach out to your Customer Value Manager or our support team.

What action do I need to take after receiving the email?

We recommend that you go directly to your Dashboard and review the mentioned step from the email. In a separate tab, you may also already open the Editor to easily update your Guide.

As errors can have various reasons, we have prepared an article on how to ensure your Guides work fine.

Should you not be able to fix the issue, do not hesitate to contact us.

Release note - UX improvements

Last Modified on 29.12.2025

10 February 2021

What's new

UX improvements

We have released the following UX improvements to the Userlane Portal to make it easier for you to navigate to and better distinguish **company account settings** from **personal user settings**.

- The **My Account** section has been renamed to **Account**.
- It now contains a drop-down menu with a link to **Global settings** and the **Personal profile** of the user that is currently logged in to the Portal, plus the option to sign out.
- The **Global settings** page now contains:
    - Applications
    - Integrations
    - Team
    - Users
    - Attributes
    - Processes
- The **Personal profile** page now contains (previously located in **My Account > Profile**):
    - Login
    - Notifications
    - API Token

ℹ Visibility of the individual menu items might vary depending on user roles and feature activations for your application.

Release note - contrast and color updates

Last Modified on 29.12.2025

Inclusive design for all users

We want everyone to be able to access our end-user solutions equally. Contrast and color are important in this regard and we want to be inclusive and readable for all our users.

Color accessibility enables people with visual impairments or color vision deficiencies to interact with digital experiences in the same way as their non-visually-impaired counterparts.

So, as of November 24th we updated the contrast of elements within the assistant as well as within step boxes of our interactive guides.

Therefore, we adjusted some of the element color intensity to reach this goal.

As an example on the left side you see what it looked like before and on the right side, the updated version:

In a nutshell what elements have been addressed with contrast changes remarkably?

- Assistant navigation bar
- Some text labels (mainly subtitles)
- List icons
- Announcement category color

Additionally - as colors are so important - we want you to be able to have your company colors represented all over your Guide.

So from now on your primary colors will be reflected in some outstanding elements as well, e.g. the border of an element.

In a nutshell what elements are connected to the primary color additionally?

- Navigation bar icons
- Chapter progress bar + chapter arrow
- Back button
- Guide CTA button
- Announcement CTA button, primary and secondary links
- Search icon, search result CTA buttons and external link graphics
- Guide link box (only for the new react player

- Announcement push navigation buttons
- Assistant branding link

Release note - adjustment to slides

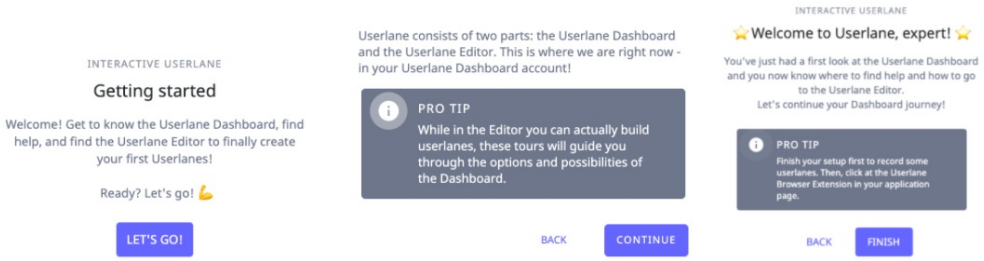
Last Modified on 29.12.2025

Every story has a beginning, a middle, and an end. We want to ensure that this is also reflected in your Guides.

From November 11th, 2020 you will be able to customize the button description appearing on your slides individually from each other and from explanation steps. This button guides your users through your interactive guide.

Before all slides had a “Next Button” shared from the explanation step text label:

With this new adjustment, you can customize the button description separately, for example:



Possible examples of an intro, explain step, and an outro slide

Do you want to make sure that you have all general texts set up? ⇨ Start this Guide to learn how.

If you have any questions (or feedback 😉), please reach out to us via our contact form.

Release note - Search added to the Assistant

Last Modified on 29.12.2025

The wait is over! You've seen it with your own eyes, tried it with your own hands, and now it's here for you.

On the 19th of October, the new Search for the Userlane Assistant comes out for your users to enjoy! Do you want to activate it right away? Click here!

Release note - new Assistant navigation

Last Modified on 29.12.2025

Here you'll find a summary of the changes that come with the improved Userlane Assistant Navigation.

Thanks to this new navigation bar:

- Your users will be able to find your Announcements faster than ever: following your feedback we moved the notification bell to a more prominent space.
- The famous red number will now reflect the number of unread Announcements, while uncompleted Guides will be marked with a blue dot (see screenshot above).
- As soon as the Search function is released (yes we've been very busy lately!), your users will also be able to search through your Userlane content thanks to the search tab.

Isn't this exciting?! If you have any questions, please reach out to us via ourcontact form.

New manager roles

Last Modified on 24.03.2026

What's new?

We've introduced four new roles to give your team more precise access control. You can now assign the right level of access to each person, whether they manage content, configure technical settings or oversee analytics, without granting broader permissions than needed.

New roles at a glance

Portfolio Owner	Full Admin access + Portfolio Overview (costs)
Analytics Viewer	Read-only access to all analytics dashboards & HEART metrics
Finance Manager	View & edit Portfolio Overview
Deployment Manager	Full Settings access, users & segments — no content and no analytics

Role details

Portfolio Owner: full Admin + Portfolio overview

- Everything a standard Admin can do, across all applications
- Exclusive access to the Portfolio Overview page, including application costs and currency settings
- Portfolio Overview is no longer accessible to standard Admins, so use this role for anyone who needs it

Assigned by: Userlane

Analytics Viewer: read-only analytics access

- Access to all Analytics pages: Overview, Content, HEART metrics, and App Discovery
- Can view the Applications list and Segments (read-only)
- Can generate API keys and access data via public API
- No access to the Editor, content pages, Settings, or Portfolio Overview

Assigned by: Portfolio Owner or Admin

Finance Manager: portfolio-level financial data only

- Can view and edit Portfolio Overview, including cost data and CSV uploads
- Can see the Applications list and App Discovery — but cannot open individual apps
- No access to the Editor, Analytics, or any Settings beyond personal profile

Assigned by: Portfolio Owner

Deployment Manager: technical setup, no content access

- Full access to all Settings: SSO, browser extension, snippet setup, integrations, selectors, and URLs
- Can view and manage team members, company users, attributes, and file transfers

- No access to the Editor, Analytics, Guides, or Portfolio Overview

Assigned by: Portfolio Owner or Admin

Changes to current roles

Standard Admins no longer have access to Portfolio Overview, including application cost data. Assign the Portfolio Owner role to anyone in your team who needs this information.

Application-level Moderators and Contributors no longer have access to company-level settings or App Discovery. These are accessible to **company-level Moderators.**

How to assign the new roles

Go to **Team Settings → Team Members** to invite new users or update the role of an existing team member. Only the roles you are permitted to assign will appear in the dropdown.

Questions? Reach out to your Customer Value Manager or check out our Help Center article on Team roles.
