Userlane Portal

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.

Guides

Here you can manage, organize, and customize your Guides.

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: Add and manage multiple languages
6. 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.