Page Rules for context-based content

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About Page Rules

Page Rules let you show content types or track Task Success only on specific URLs.

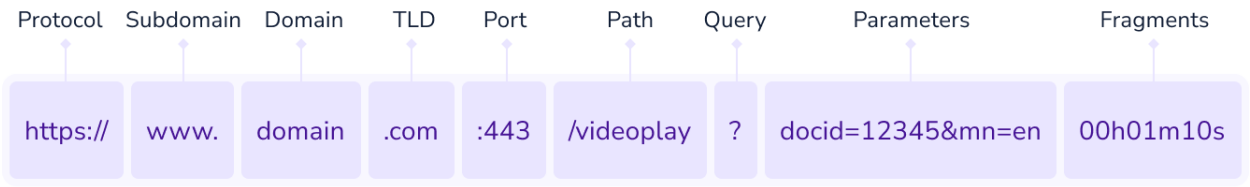
Why use it

The benefits of Page Rules include the following:

- **Targeted Content:** Page Rules allow you to show specific Guides, Tooltips, Validators, Tasks, 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 Rules enhance the overall user experience, making it more intuitive and streamlined.
- **Easy Customization:** Page Rules eliminate 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 Rules can be easily created and modified, allowing you to adapt your content to your application's URL structure changes.
- **Enhanced Assistant Experience:** Page Rules affect 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 Rule:



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 Rule of the respective content, and make it available to the production environment.

How to create a Page Rule

Access Page Rule

Access the Portal to create the Page Rule: Portal > Targeting > Page Rules

Create a Page Rule

Overall, there are three ways in which you can create a Page Rule:

- 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 Rule 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 Rule

Depending on the content you wish to target, you may need to apply it in the Portal (for Announcements, Surveys, and the Assistant), or in the Editor (for Chapters, Guides, Validators, Tooltips, Tasks and Tags).

Delete a Page Rule

Rules that are in use can't be deleted. If you want to delete a Page Rule, you must remove the applied Rule first.

To check if a Page Rule is in use, access Portal > Targeting. In the Rules table, you can check whether a content type is connected to a Rule with the help of the Usage column.

Page Rules conditions

The conditions can be summarized in the following way:

- subdomain, domain, and domain suffix support for Page Rules
  - wildcard support for subdomains has been added
  - the domain and domain suffix must be added to the Page 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 Rule.
- If you add path parameters after the domain name, the accessed URL must fully match the Page Rule.
  - if only path parameters are added to the Page 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 target your content.
  - You can use wildcards for path parameters

Examples: old logic vs new logic

Accessed URL	Page Rule condition	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 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 Rules applied for a whole chapter will affect every Guide within this Chapter.
- If you apply another Page Rule 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 Rule. It shows the number of uncompleted Guides in the first uncompleted chapter.