Frequently Asked Questions (FAQ)

This article explains the Frequently Asked Questions (FAQ), we receive from our customers.

Access to Userlane

I am having troubles logging in, what can I do?

First of all try to check whether your credentials are correct. Should you have forgotten your password, you can reset it via this link here. Please also check your spam folder. Should you still face any issues logging in, please contact the Support Team.

Do Contributors count as Editors?

Contributors are able to create new Guides or Announcements and manage those in draft mode only. They still see the Start Editor button though. For publishing content with Userlane different access is required.

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.

Content creation

What are real-life examples of skip conditions?

Check out this article to learn more about it.

What basic functionality do I need to understand to build my first few Guides?

We recommend learning more about the Editor here.

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.

How do I get rid of the Editor when it is in the way?

You can align the Editor to the right or left as you prefer but also have the option to minimize the Editor.

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.

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).

Security & Architecture

Where is the data stored?

You can learn more about this here.

What type of data are you pulling from the system?

You can learn more about this here.

Do you offer SSO?

Yes, we do. Please reach out to your Customer Success Team for the full documentation. Userlane will only be visible when the application is used in the browser with the extension implemented via manual user rollout, seamless IT integration, or SSO.

Do you offer SOC 2?

Userlane is ISO 27001 Certified. SOC 2 is in the planning phase.

Do you comply with GDPR regulations?

Userlane Data Processing is aligned with GDPR. Check out more about it here.

Can we link a 2FA to Userlane?

SAML v2 integration is available.

Why do I see a 401 login notification?

Userlane is authenticating who is currently using the Assistant. Users who are not logged in to the Userlane Portal will see the notification 401 in the Browser console. It does not impact the performance of Userlane or your app.

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.