

Configuring the AI Assistant

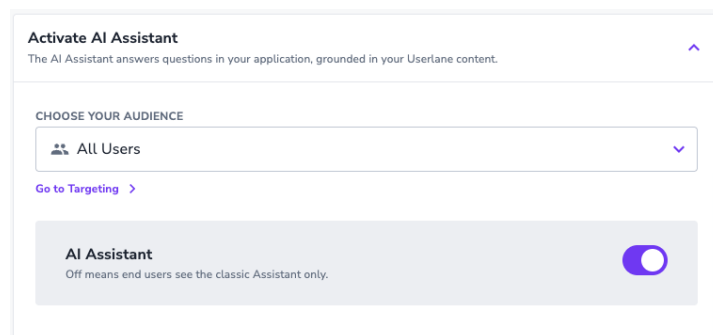
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The AI Assistant is set up in the Userlane Portal, under Agentic Assistance. From there you choose whether it is on and who sees it, and you control how it behaves: its name and welcome message, its tone, the topics it will not answer on, whether it can use general knowledge, the starter questions it offers, and the support contact it hands off to.

Turning on the AI Assistant

1. Open Agentic Assistance.
2. Under Choose your audience, select who should see it. You can make it available to everyone, or limit it to one or more user segments. To start with a small test group, create a segment for it first (see User segments for better targeting).
3. Switch on Activate AI Assistant.
4. Save your changes.

Only the users in the audience you choose will see the AI Assistant. Everyone else continues with the classic Userlane Assistant.



Identity

Name

The name your users see for the Assistant. Use whatever fits your organization. It is shown as you enter it and is not translated.

Welcome message

The greeting shown when a user opens the Assistant. It is translated automatically into your users' languages.

Avatar

The Assistant uses the same avatar as your Userlane Assistant. To change it, go to Customize > Design; the change applies in both places.

Identity
How the Assistant introduces itself to your users.

NAME

AI Assistant

HELLO MESSAGE

Welcome! Ask me anything about the tools you use here.

AVATAR


Uses the Assistant avatar for this property.

Starter questions

The prompts shown to a user before they type, to help them get started. There are up to four, and you choose which appear :

- Two ready-made questions: Updates, which surfaces recent announcements, and Support, which routes the user to your support contact and help documentation.
- Two of your own, which you write and point at specific content.

Starter questions
The four questions shown before a user has typed anything. You can edit each one and choose what answers it, but not add, remove, or reorder them.

1
Custom question 1
CONFIGURED

Write your own question and map it to the guides or articles that answer it.

QUESTION

How do I get started here?

ANSWER GROUNDED IN

Search your Guides and articles by keyword

Guides and Knowledge Base articles are both searchable here.

Userlane Portal

2
Custom question 2
CONFIGURED

A second question you define yourself, with its own set of references.

QUESTION

What can I do here?

ANSWER GROUNDED IN

Search your Guides and articles by keyword

Guides and Knowledge Base articles are both searchable here.

Customize Userlane
Set up your application URL

3

Updates
Surfaces your recent announcements.

CONFIGURED

QUESTION

What's new?

ANSWER FROM ANNOUNCEMENTS PUBLISHED IN

the last 60 days

A rolling window, so it never goes stale. If nothing was published in the window, the Assistant answers from your most recent announcement.

4

Support
Routes users to your support contact and help documentation.

CONFIGURED

QUESTION

How do I get help?

ANSWER GROUNDED IN

<https://family.userlane.com/support>

Uses the help and support links set on the Customize > Help page.

Behavior

How the Assistant sounds, and the topics it avoids.

Tone

Sets how the Assistant phrases its answers:

- Neutral (the default)
- Professional
- Friendly
- Concise

Tone changes the wording only. It never changes the facts, the sources, or the results an answer is based on.

Guardrails

Choose any topic the Assistant should avoid. A user who asks about it is sent to your support contact instead. This is useful where certain subjects should always be handled by a person rather than by AI.

Behavior

How the Assistant sounds, and the topics it avoids.

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TONE

☒ Neutral
Clear and factual. No personality either way.

☐ Professional
Polished and businesslike. Suits regulated and enterprise environments.

☐ Friendly
Warm and approachable. Suits internal tools and lower-stakes applications.

☐ Concise
Answer first, minimum words. Suits people who use the tool daily.

Tone changes wording only. The facts and sources stay the same.

GUARDRAILS

Check any topic the Assistant should avoid. Users who ask are sent to your support contact.

☒ Clinical and medical advice
Diagnosis, treatment, prescribing, dosage, and decisions about a patient's care.

☒ Legal advice
Interpretation of law, contractual obligations, and legal rights or liabilities.

☒ Financial and investment advice
Investment, tax, or personal financial guidance.

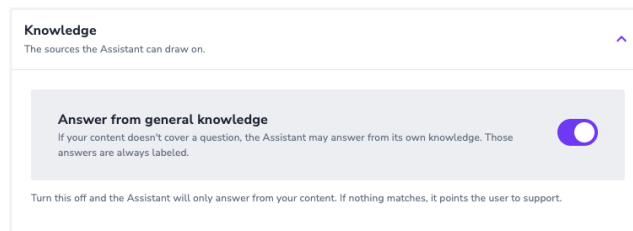
☒ HR and personnel matters
Pay structures, performance management, grievances, and employment terms.

Knowledge

The sources the Assistant can draw on.

Access to general knowledge

Controls whether the Assistant may answer from general knowledge when your published content does not cover a question. When it does, those answers are always labeled as coming from general knowledge. This is on by default; switch it off for applications that should only ever answer from your own content.



Help and support links

The support contact the Assistant offers when it cannot answer, and the destination of the Support starter question. These come from the help and support links on your Customize > Help page; set or update them there, and the Assistant uses them.

Good to know

- Settings apply per application, to everyone in the chosen audience. There is no separate configuration per individual user.
- Changes take effect the next time a user loads the application.
- Application and company details curated by Userlane are shown as read-only; the settings above are the ones you edit.

Related Articles

- [The Userlane AI Assistant](#)
 - [Connecting your AI service to the Assistant](#)
 - [How to optimize content for the Userlane AI Assistant](#)
 - [AI Assistant analytics](#)
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