Tooltips

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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?

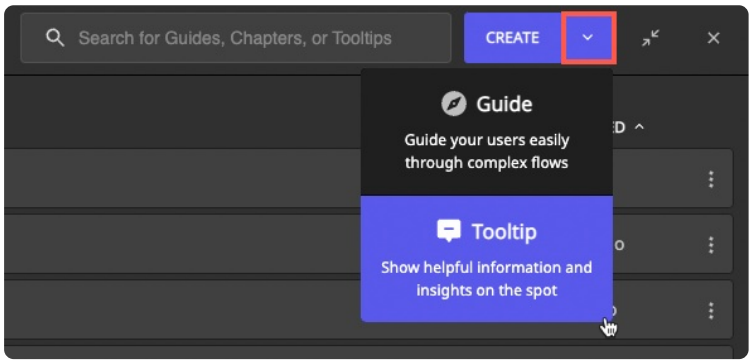
There is a single **Tooltip edit mode** to create, save, edit, and publish all in one view in the Editor.

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**.



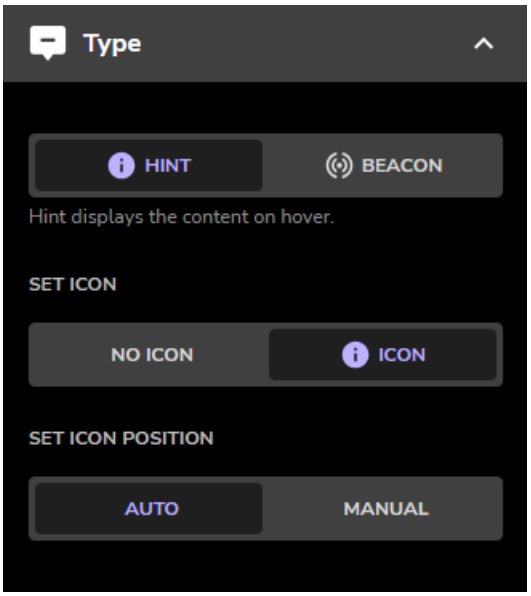
   The Editor is minimized in the bottom left of your screen.
2. Select the **target element** for the Tooltip, e.g., a button, input field, or menu. A description input box displays.
3. Type a helpful description of the element.

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 positioning

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).

Icon color setting

- You can set the color of the hint and beacon icons to match your corporate identity or the individual app

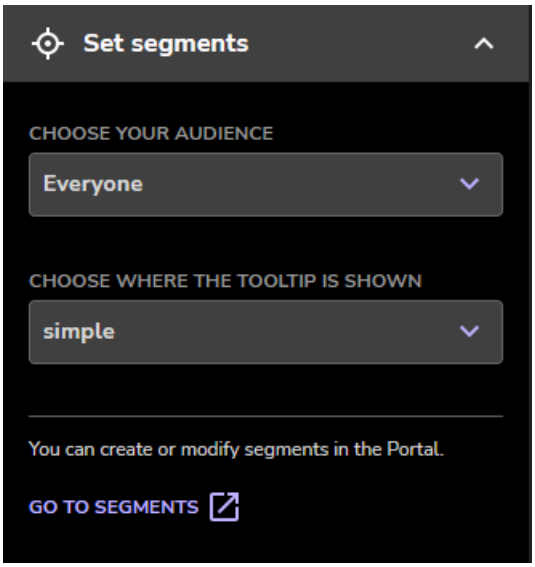
palette.

- The color setting of your icons can be adjusted in ***Customise > Design*** screen in the **Portal**.

Tooltip Segment

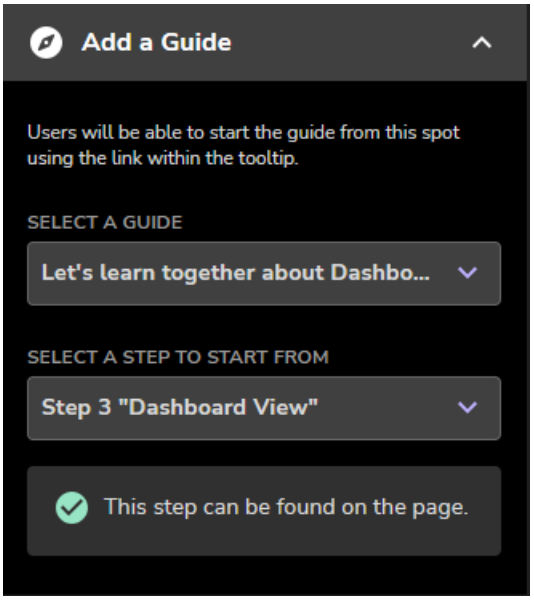
Page Segmentation and User Segmentation

- 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.



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

Global Export/Import Text feature

- Tooltips are included in their sheet within the Global Export file (Portal > Customize > Languages).
- Tooltip translation can be imported via the Export/Import Text feature.

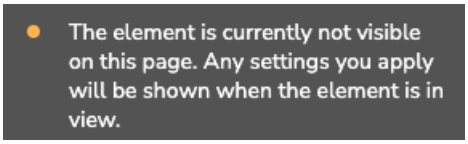
Language Management

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

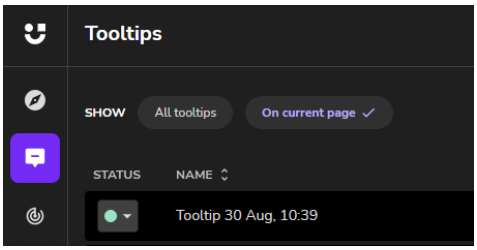
You can edit the Tooltip name anytime - we recommend doing that after you decide on a pattern you wish to follow with your team. For example, you could also add the page or process to the Tooltip name.

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

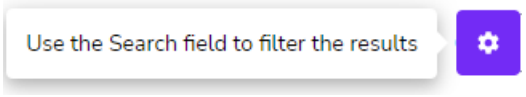
To find the Tooltip you wish to edit, you don't have to go through the entire list of Tooltips available in the Editor. You can click on "Show on current page" and Userlane will filter for you the Tooltips that can be found on that page.



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.