

# Shadow AI Actions

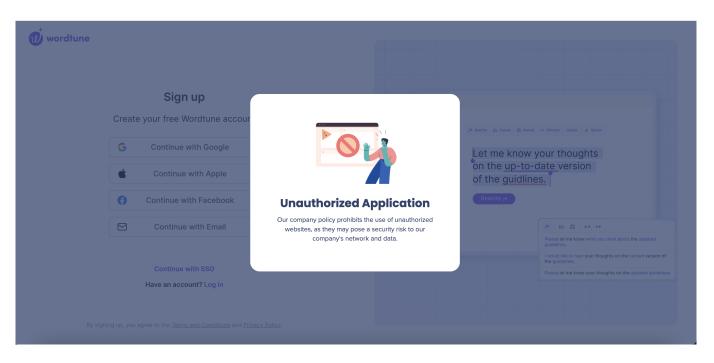
## Brief Overview

Once you have enabled Discovery's Shadow AI to gain full visibility into AI use, you can create Shadow AI Actions to configure and publish guardrails and guidance to any AI site without any previous WalkMe knowledge or WalkMe system configuration required.

#### Why use Shadow AI Actions?

- Curated Shadow AI solutions and templates
  - "Shoutout" Actions
  - "Restrictions" Actions **NEW!**
- Preview & Publish directly from the Discovery apps dashboard
  - $\circ~$  No editor needed
  - $\circ~$  No system configuration needed





## Use Cases

Explore samples of Shadow AI Action solutions and templates, which provide practical examples of how businesses can enhance their operations:

- Redirect Users: Redirect employees to an approved alternate app
- Block Access: Block app access and use by employees
- **Block Typing and Pasting**: Prevent users from entering text or pasting copied text into input fields
- IT Request: Implement an efficient AI app access request process
- AI Policy: Ensure employee compliance with the company's enforced AI policy
- AI Tips: Prompt recommendations and enable employees to leverage AI more effectively
- **Share with Colleagues:** Learn from colleagues and discover apps that may benefit the wider organization
- Employee Training: Provide educational resources to employees
- **Explore More AI:** Promote AI apps by encouraging employee adoption of approved AI applications



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B Shadow Al Actions	Q Search		
Restrictions			
	Enforce Al Policy Ensure employee compliance with the company Al policy	Block Complete Access Entirely Restrict Site Entry	Block Pasting Text Restrict pasting to minimize risk of sharing sensitive information

### Get to Know and Use

#### Create an Action

- 1. In the **Discovery Apps** page in the **Console**, accessible at <u>console.walkme.com/discovery/apps</u>, go to the **Shadow AI** tab
- 2. Click on the + symbol in the WalkMe Actions column

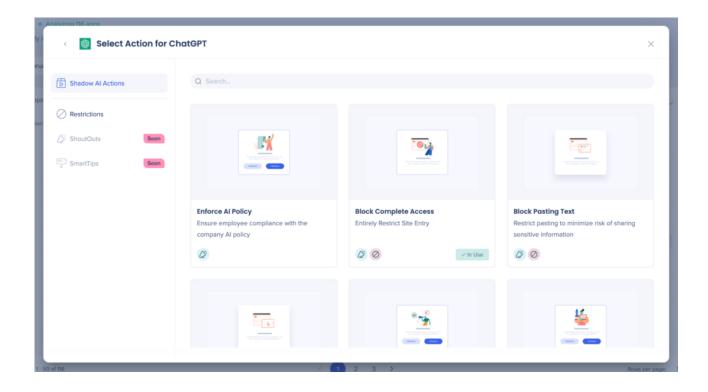


#### walkme

Apps   • Analyzing 88 apps						*	
Gain visibility into application usage, us	er engagement and opportunities	to improve adoption					
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Name	Active Users (?)	Org Usage ?	Usage Frequency ?	Weekly Time Spent ?	Tags	WalkMe System ?	WalkMe Actions
WalkMeGPT	396	37%	Monthly	21:07m	Approved +1	GitHub	4 Actions
Jasper	271	26%	Monthly	34:20m	Approved	Jasper Al	4 Actions
S ChatGPT	194	18%	Monthly	19:14m	Not Approved	OpenAl	+ Actions
OpenAl	49	5%	Monthly	15:47m	Approved	(+)	4 Actions
G Grammarly	26	2%	Monthly	30:44m	+	Unmanaged Apps	4 Actions
QuillBot	22	2%	Monthly	10:20m	+	(+)	4 Actions
🛛 🕖 Wordtune	19	2%	Monthly	11:05m	+	(+)	4 Actions
📄 🦉 UiPath Cloud Pla	form 13	1%	Monthly	2.5h	Reviewed	$(\pm)$	+
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🗌 🏃 BlueOcean Al	9	1%	Monthly	9:30m	+	(+)	+
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3. Search through the gallery to find existing action templates for you to customize



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4. Edit your ShoutOut content and buttons for your specific use case

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🖉 Set ShoutOut	,	Visual Designer	
	the second secon	yi O	Y         Image: Constraint of the second s
Display Condition		~	buyer industry). Marketing - Generate a list of keywords for an SEO campaign related to our latest product launch. Include long-tail keywords and low-competition keywords. Product - List potential names for a feature that does [feature functionality]. Got it
			Save & Continue

- 5. Select the conditions needed to display the ShoutOut
- **Display Frequency:** Define how often the ShoutOut is displayed for users with the following options
  - On every visit
  - $\circ~$  Once a day
  - $\circ~$  Once a week
  - $\circ~$  First visit only



- **End display on:** Select the button that permanently stops the ShoutOut from being displayed to the user
  - $\circ\,$  For this example, the options are:
    - Never
    - Got it button
    - X button
    - Select all (both the **Got it** button and **X** button)

#### Note

When an end display option is chosen by the builder, it will override the display frequency and prevent the shoutout from playing again.

6. Click Save & Continue



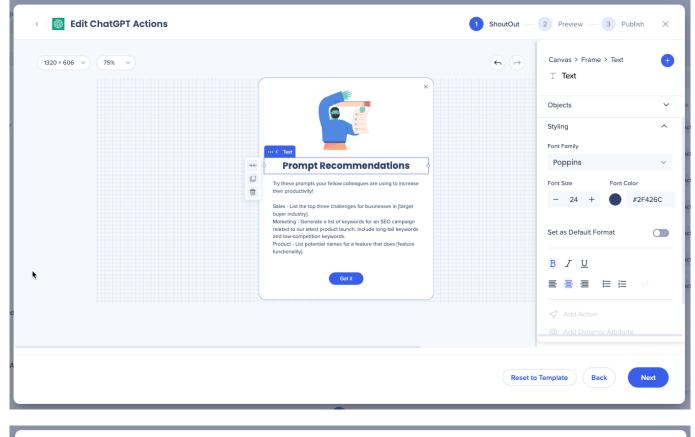
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Content	~	×
Button	~	
Display Condition	^	
Display Frequency (5) Once a day ~	*	Prompt Recommendations
End display on (i)		Try these prompts your fellow colleagues are using to increase their productivity!
Never ~		Sales - List the top three challenges for businesses in [target buyer industry].
		Marketing - Generate a list of keywords for an SEO campaign related to our latest product launch. Include long-tail keywords and low-competition keywords.
		Product - List potential names for a feature that does [feature functionality].
		Got it
		Save & Continue

#### Visual Designer

Tip: Click on Visual Designer to access advanced customization options

**Note:** You can always go back to the original template by clicking Reset to Template, but any changes you have made will be lost.





C G Edit ChatGPT Actions		1 ShoutOut 2 Preview 3 Publish X
Set ShoutOut	Visual Designer	
Content Title Prompt Recommendations Message Try these prompts your fellow colleagues are using to increase their productiv Sales - List the top three challenges for businesses in [target buyer industry].	ity!	Frompt Recommendations         Try these prompts your fellow colleagues are using to increase
Button	~	their productivity! Sales - List the top three challenges for businesses in (target
Display Condition	~	buyer industry]. Marketing - Generate a list of keywords for an SEO campaign related to our latest product launch. Include long-tail keywords and low-competition keywords. Product - List potential names for a feature that does [feature functionality]. Got it
		Save & Continue



7. Click **Preview Actions** to test your actions and confirm that everything is working as expected

Preview will demonstrate the actual behavior on the app - visual and frequency.

• For example, an action with a weekly frequency will appear only if the day of the test (Preview) is the day this action should be played by definition

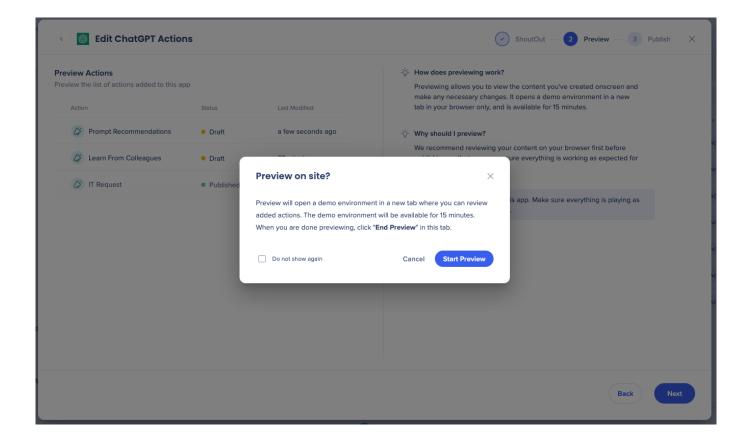
Edit ChatGPT Actions	3		ShoutOut 2 Preview 3 Publish X
Preview Actions Action Action Conference Prompt Recommendations Conference Recommendations Conference Recommendations Conference Recommendations Conference Recommendations	Status • Draft • Published	Last Modified a few seconds ago 33 minutes ago 13 days ago	<ul> <li> How does previewing work?</li> <li>Previewing allows you to view the content you've created onscreen and make any necessary changes. It opens a demo environment in a new tab in your browser only, and is available for 15 minutes.</li> <li> Why should I preview?</li> <li>We recommend reviewing your content on your browser first before publishing so that you can ensure everything is working as expected for your employees.</li> <li>System already exists for this app. Make sure everything is playing as expected before publishing.</li> <li>Preview Actions </li> </ul>
			Back Next

8. Click **Start Preview** and a demo environment will open in a new tab for you to preview and test that your actions are working as expected

Note

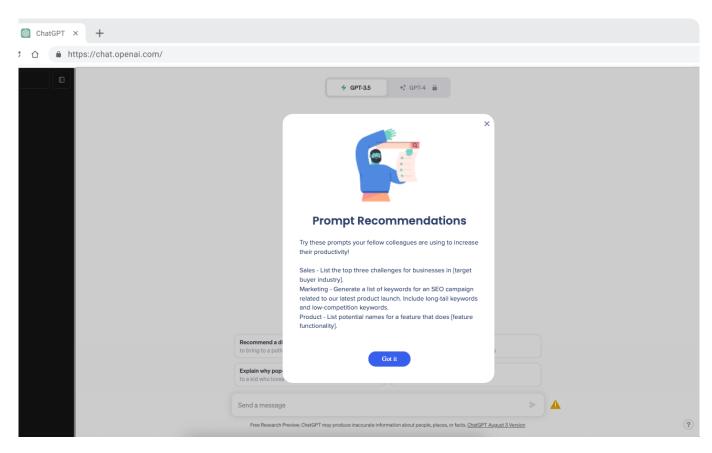
- The demo environment will be available for 15 minutes
- Pop up and redirect settings must be enabled in your browser for the preview to open. If its not enabled a popup message will appear and instruct you on how to enable





9. Preview your content in the new tab and confirm that everything is working as expected

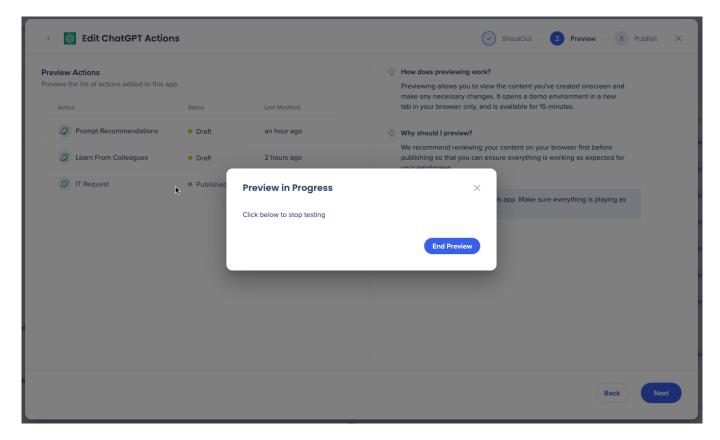




10. Click End Preview in the previous tab once you are finished

#### 11. Click Next





12. Click Publish Actions for your employees to view your newly created actions



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Publish Actions         Publish the list of actions added to this app         Action         Image: Comparison of the property of	Status • Draft • Published	Last Modified an hour ago 2 hours ago 13 days ago	<ul> <li>How does publishing work?</li> <li>Publishing actions will allow your employees to view the content you have created.</li> <li>When should I publish?</li> <li>Before publishing any actions, we recommend that you preview content so you can test that everything is working as expected. If you have not done this yet, click Back to return to preview.</li> <li>System already exists for this app. Make sure everything is playing as expected before publishing.</li> <li>Publish Actions</li> </ul>
			Back Done

### Manage Actions

#### **Delete an Action**

- 1. Hover over the action you would like to delete
- 2. Click the **bin icon** to delete



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I T Request • Published   Learn From Colleagues • Published   Prompt Recommendations • Published   Image: Colleagues of the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It, therefore you will be redirected to the same application is not managed by WaikWer's It

#### WalkMe Activate / Deactivate Toggle

- Deactivated: When turned off, no actions will be played on the app, even if they're published
- **Re-activated:** When turned on again, all published actions will be played again



ChatGPT Actions		
ions	<b>e</b>	
Action	Published	
Learn From Colleagues	Published	
Prompt Recommendations	Published	
		Unauthorized Application
		The following application is not managed by WalkMe's IT, therefore you will be redirected to the same app (same technology) that is approved internally.
		Launch WalkMe GPT
		Added 5 minutes ago Trigger: On every visit
WalkMe Active 🕥		> Preview Actions
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### Support

- 1. If preview is not working:
  - 1. Enable popup and redirects on browser settings
  - 2. Close the WalkMe Editor
  - 3. Check the extension version
    - min. version 4.0.141 for Shoutouts Actions
    - min version 4.0.158 for Restrictions Actions
- 2. If content is previewed on an app that requires login, the user may be redirected to another URL typically a home or login page

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- 3. In a published environment, content will play on the first URL reached which matches the app's URL definition
  - $\circ\,$  Takes ~15 minutes of cache time for the extension to inject the system (default extension setting)
    - immediate local publish for the user who published
- 4. The functionality to upload images to the visual designer is currently unavailable

### Limitations

- Several AI applications have been adjusting the default WalkMe CSS, which may result in an unsatisfactory appearance of actions
  - $\circ\,$  The list of these apps is provided here for reference: OpenAI, Pathlight, beautiful.ai , Dynatrace LLC, people.ai
- The Preview and Publish feature is applicable only for all actions collectively, rather than for individual actions
- The functionality to upload images to the visual designer is currently not supported

#### **Preview limitations**

- Browser Settings: Pop-ups and redirect settings should be enabled
  - Chrome instructions: <a href="https://settings/content/popups">chrome://settings/content/popups</a>
- WalkMe Editor must be closed when previewing

#### **System limitations**

• If you already have a WalkMe system created on an app, you need to publish your settings in the Editor in order to view both content at the same time or preview and publish won't work for shadow AI actions