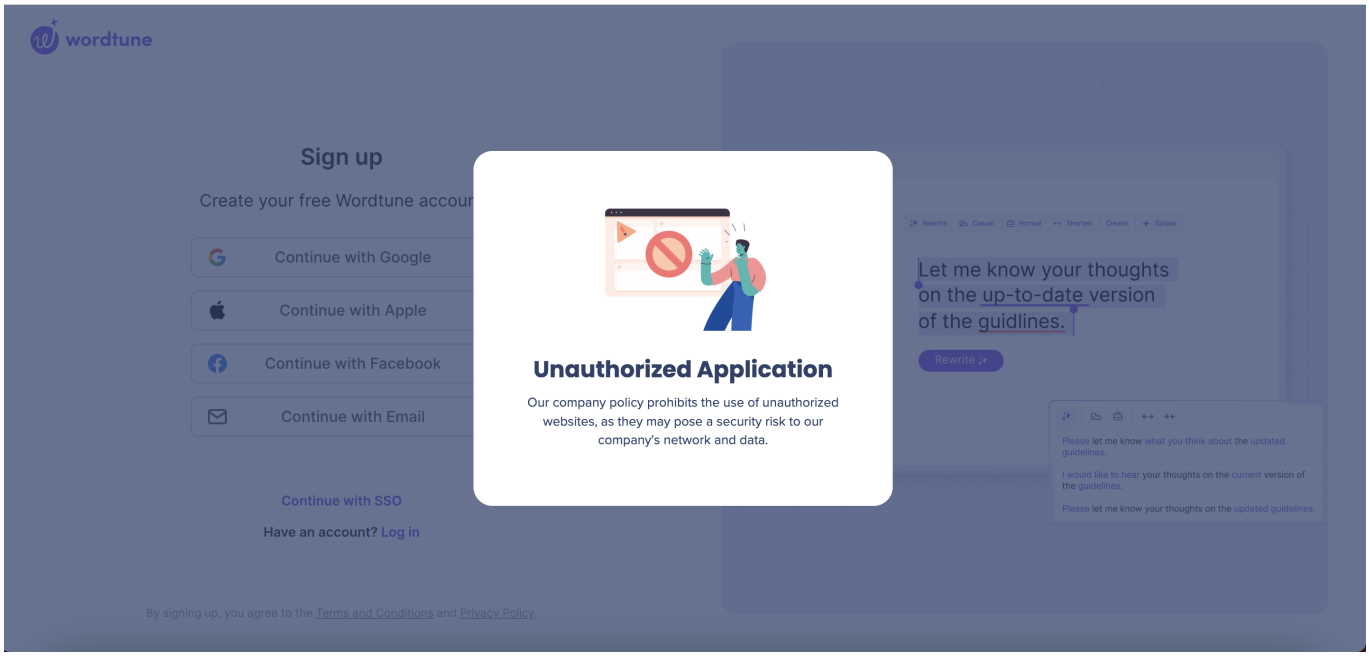
Shadow AI Actions

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?

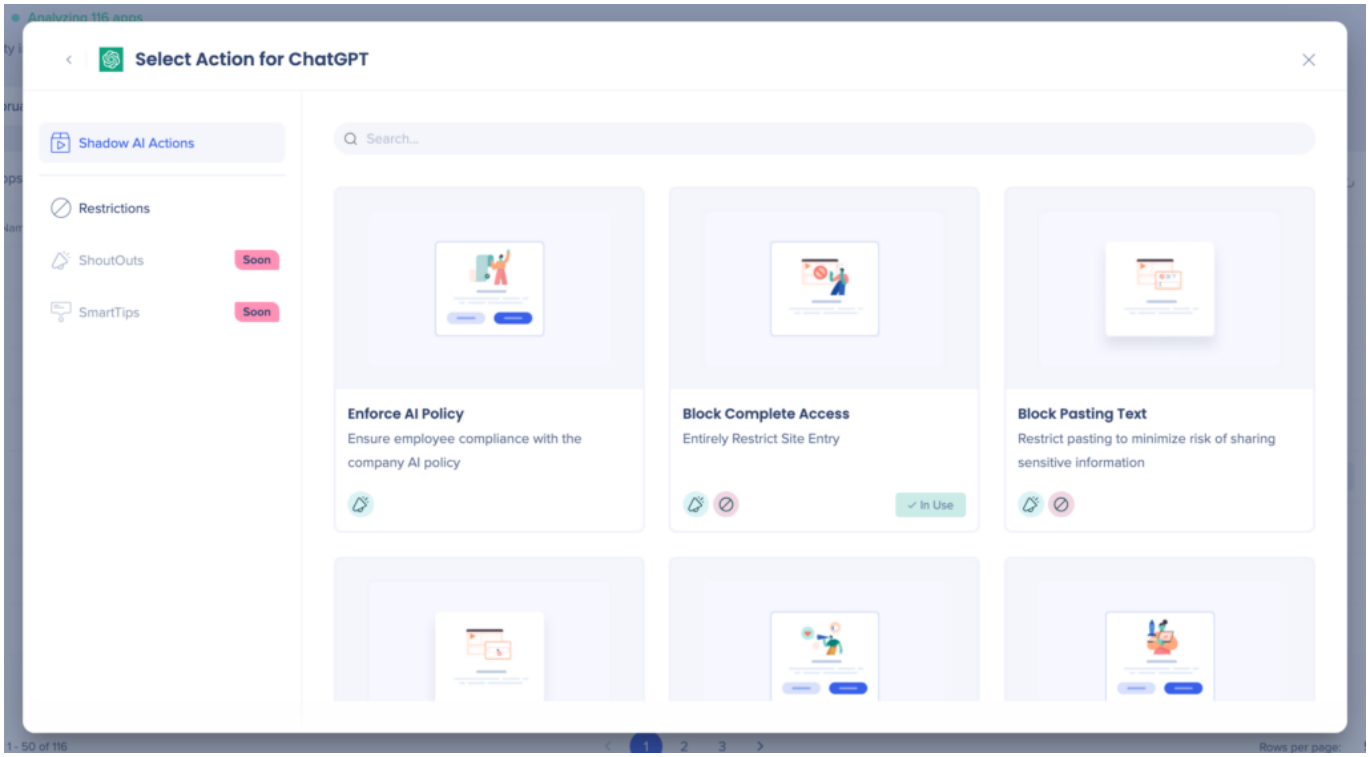
- Curated Shadow AI solutions and templates
    - "Shoutout" Actions
    - "Restrictions" Actions ***NEW!***
- Preview & Publish directly from the Discovery apps dashboard
    - No editor needed
    - No system configuration needed



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

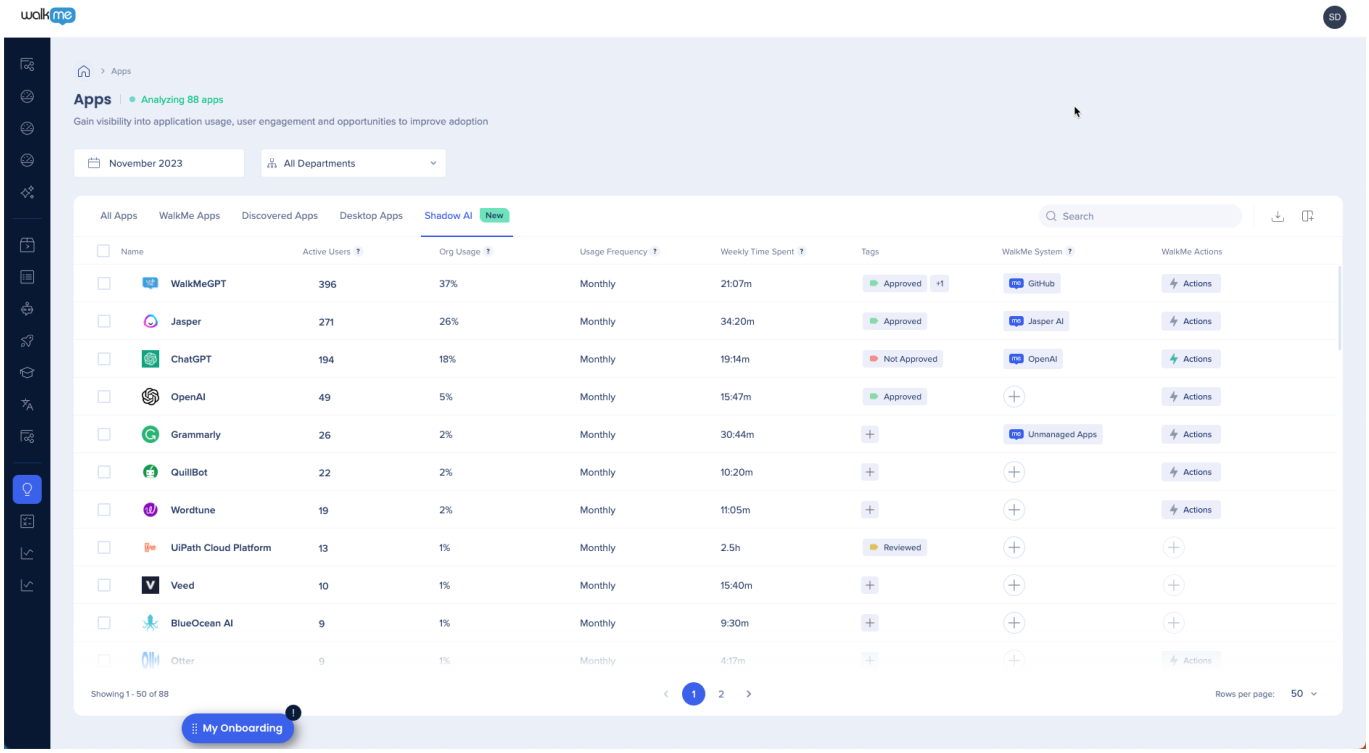


Get to Know and Use

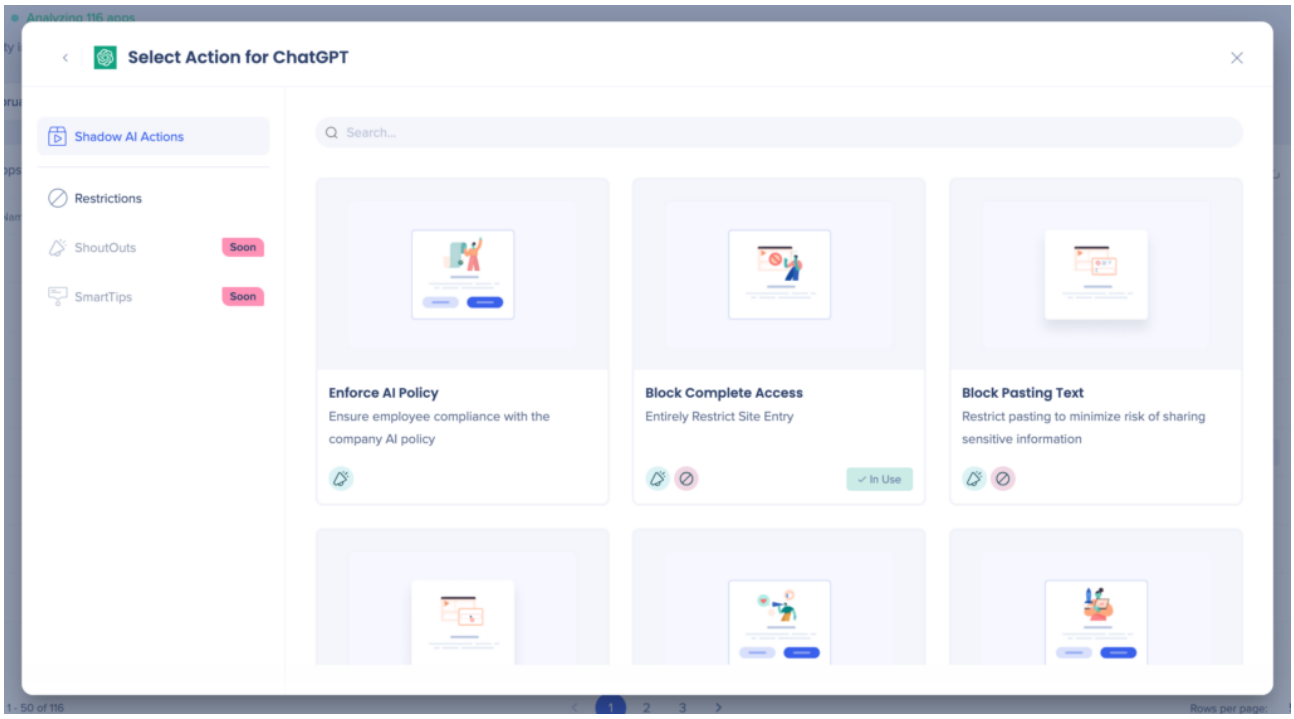
Create an Action

1. In the **Discovery Apps** page in the **Console**, accessible at console.walkme.com/discovery/apps, go to the **Shadow AI** tab

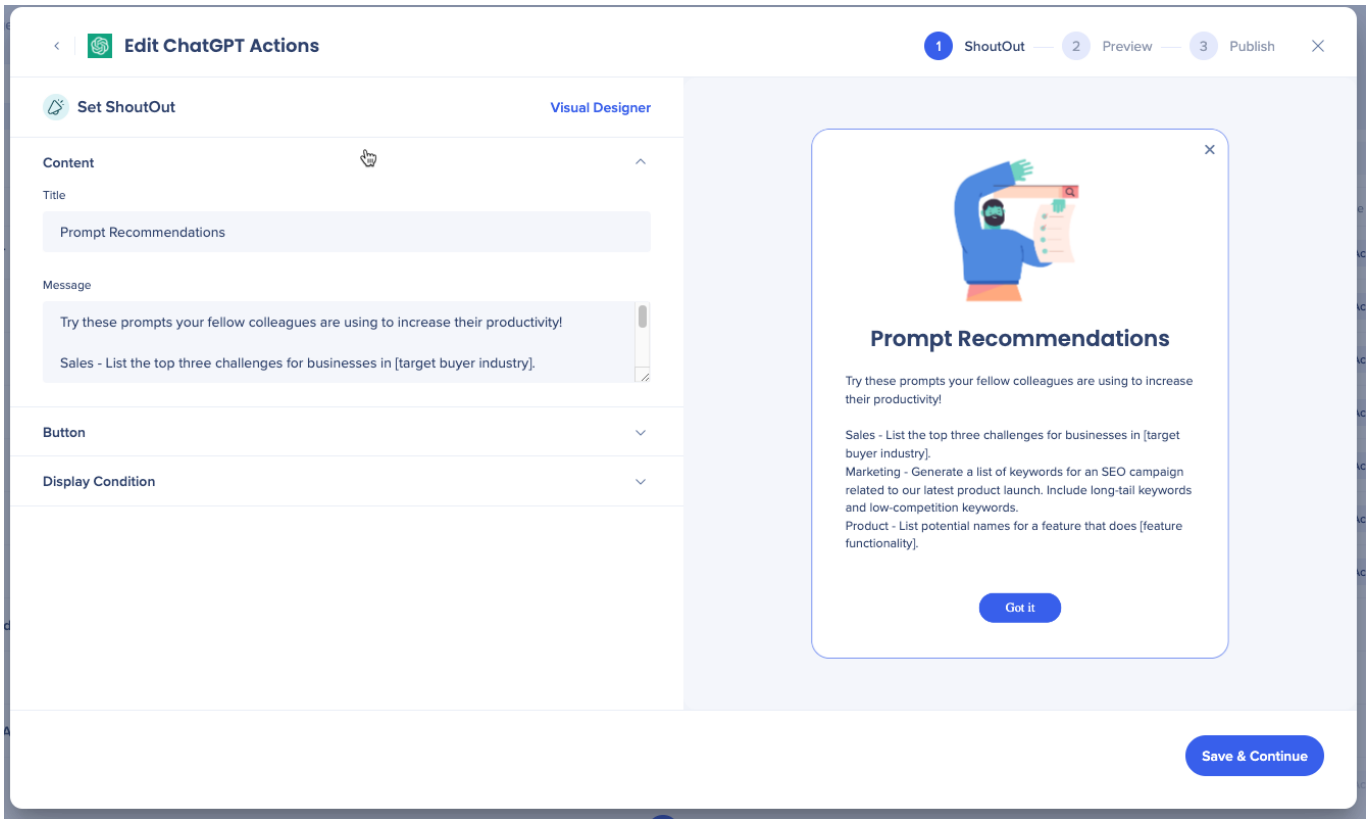
2. Click on the **+** symbol in the **WalkMe Actions** column



3. Search through the gallery to find existing action templates for you to customize



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



5. Select the conditions needed to display the ShoutOut

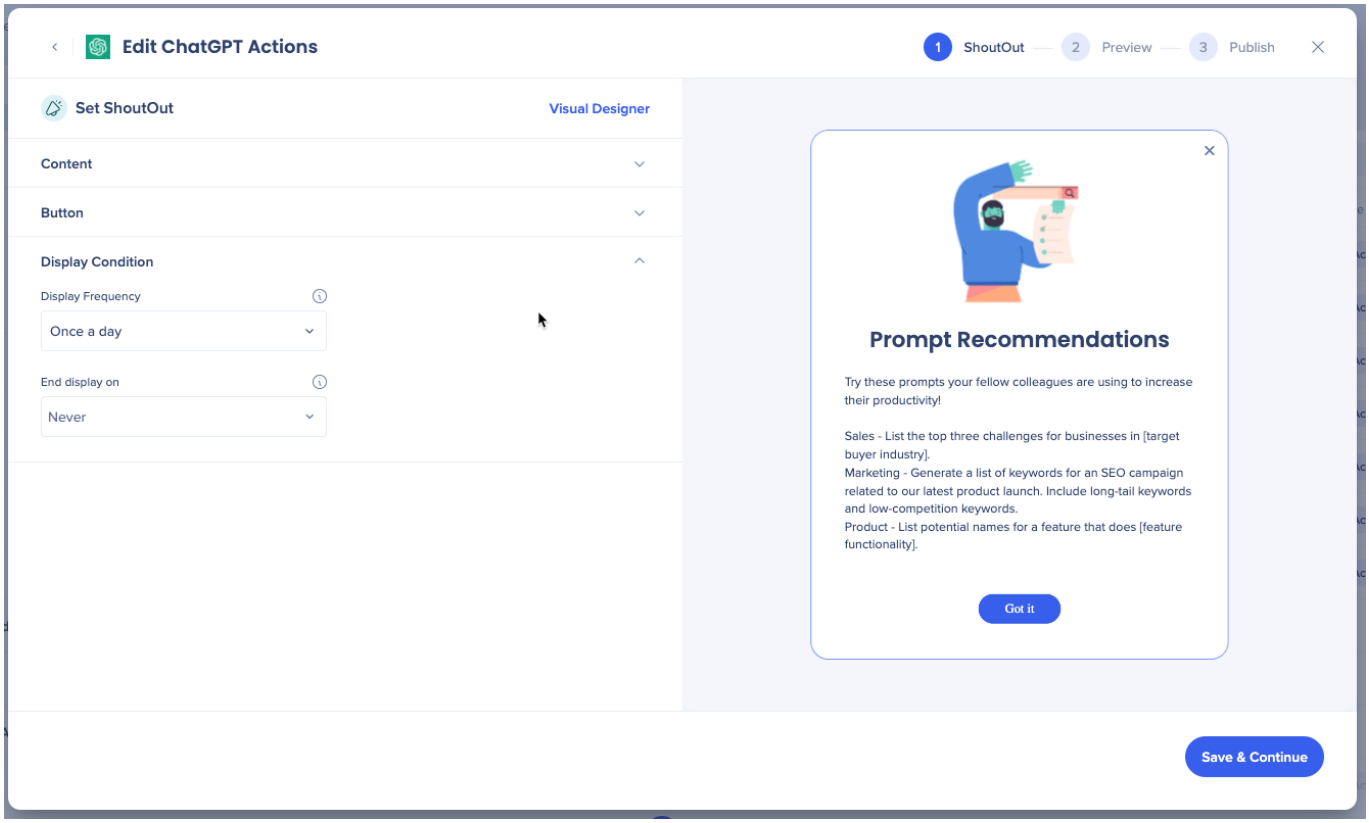
- **Display Frequency:** Define how often the ShoutOut is displayed for users with the following options
    - On every visit
    - Once a day
    - Once a week
    - First visit only

- **End display on:** Select the button that permanently stops the ShoutOut from being displayed to the user
    - 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.

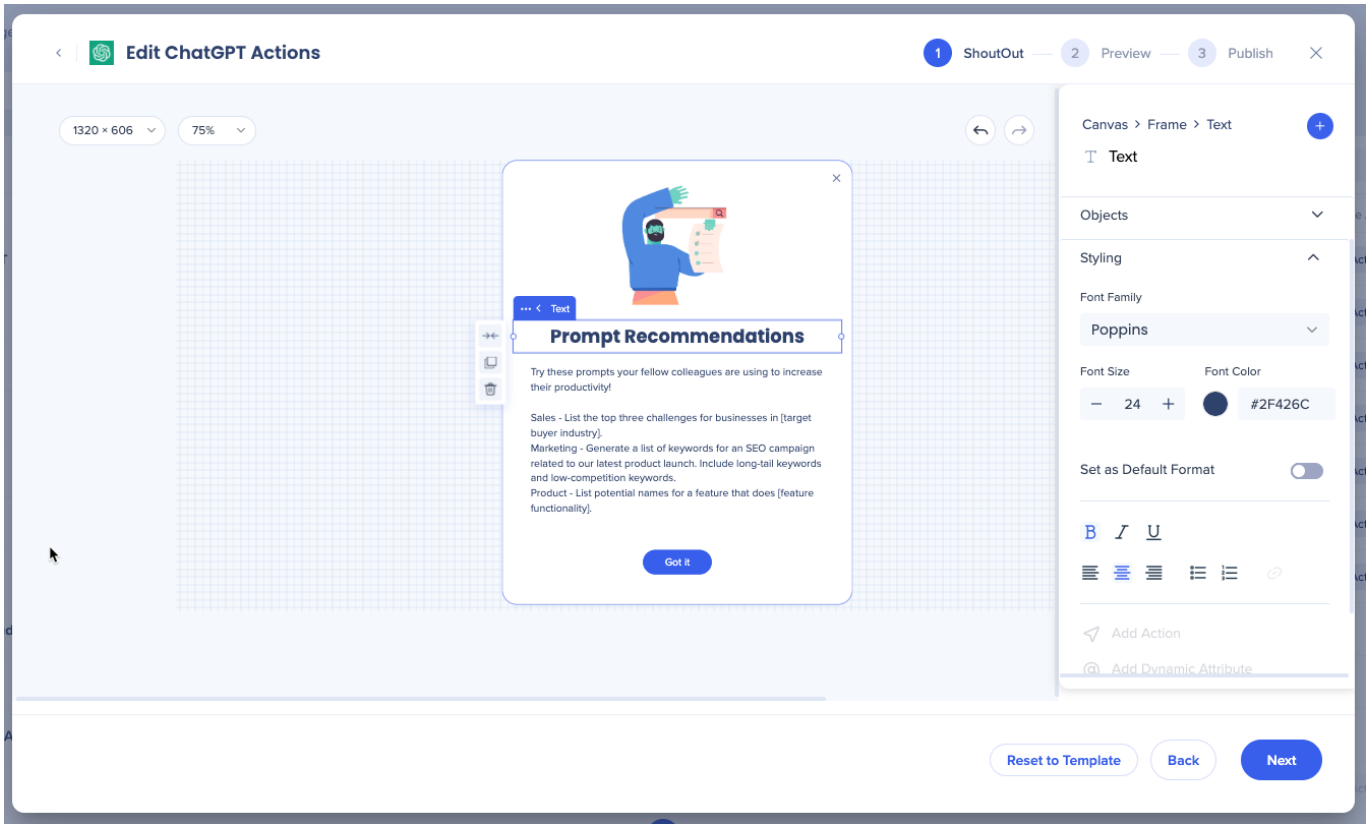
6. Click **Save & Continue**

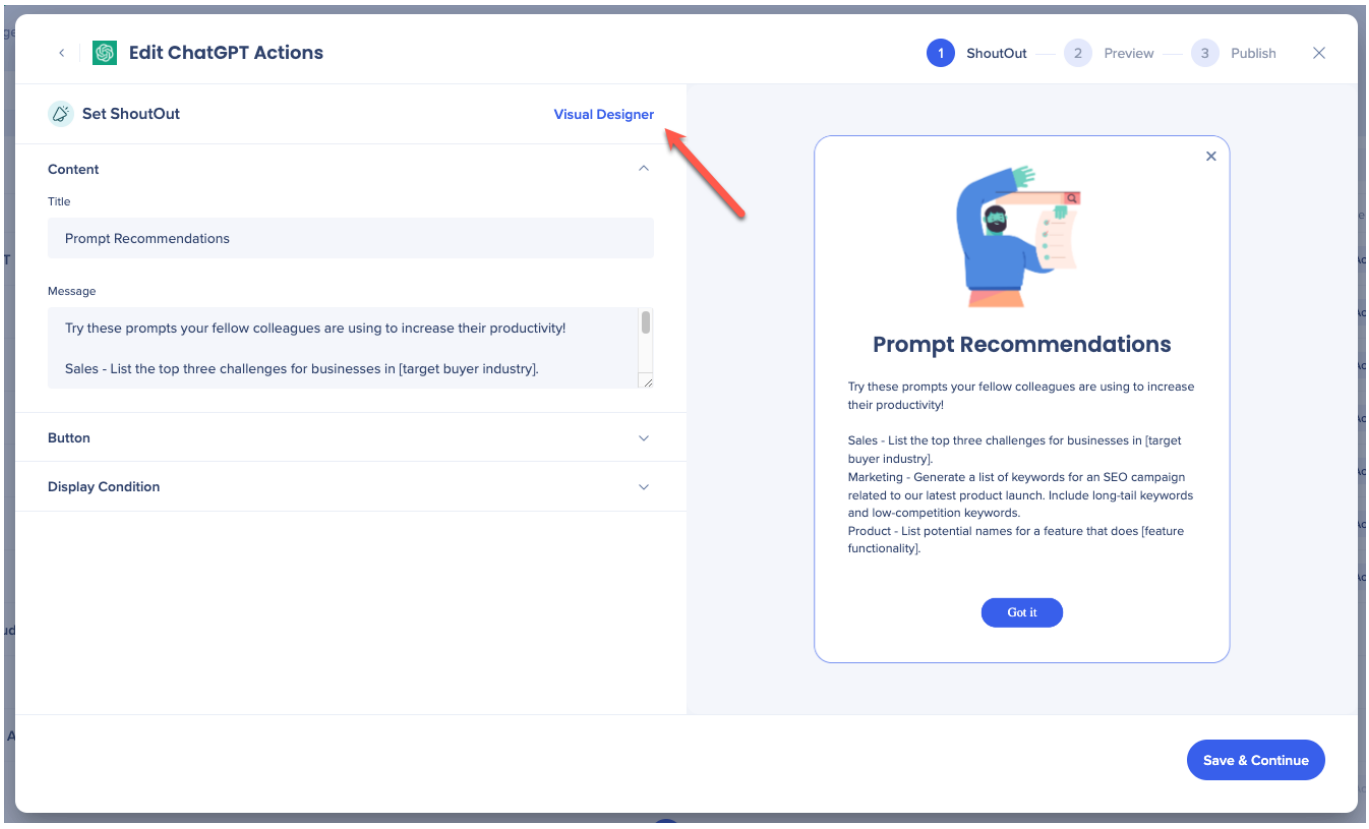


Visual Designer

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.

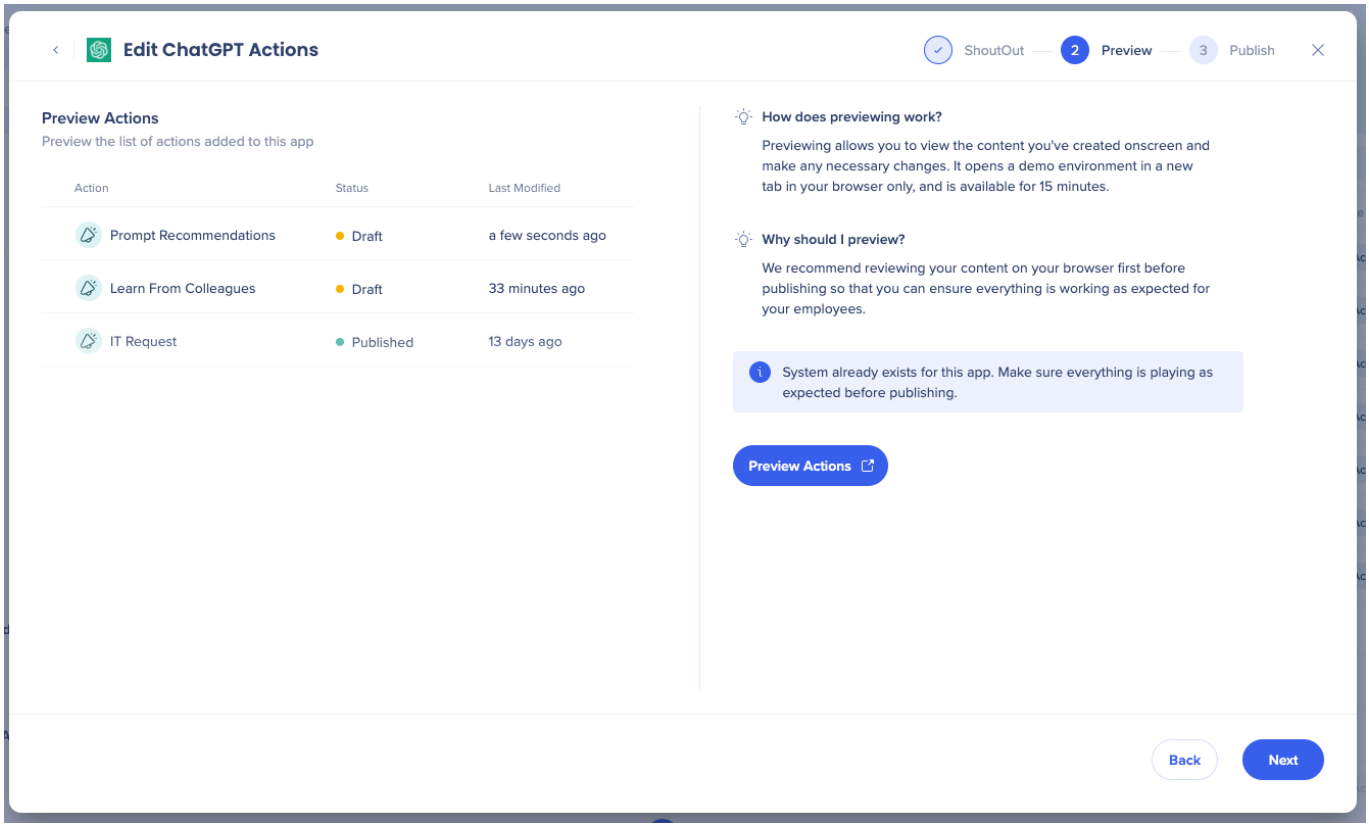

Edit ChatGPT Actions
1 ShoutOut
2 Preview
3 Publish
1320 × 606
75%
Canvas > Frame > Text
Text
Objects
Styling
Font Family
Poppins
Font Size
24
Font Color
#2F426C
Set as Default Format
Add Action
Add Dynamic Attribute
Text
Prompt Recommendations
Try these prompts your fellow colleagues are using to increase their productivity!
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
Reset to Template
Back
Next


Edit ChatGPT Actions
1 ShoutOut
2 Preview
3 Publish
Set ShoutOut
Visual Designer
Content
Title
Prompt Recommendations
Message
Try these prompts your fellow colleagues are using to increase their productivity!
Sales - List the top three challenges for businesses in [target buyer industry].
Button
Display Condition
Prompt Recommendations
Try these prompts your fellow colleagues are using to increase their productivity!
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

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.

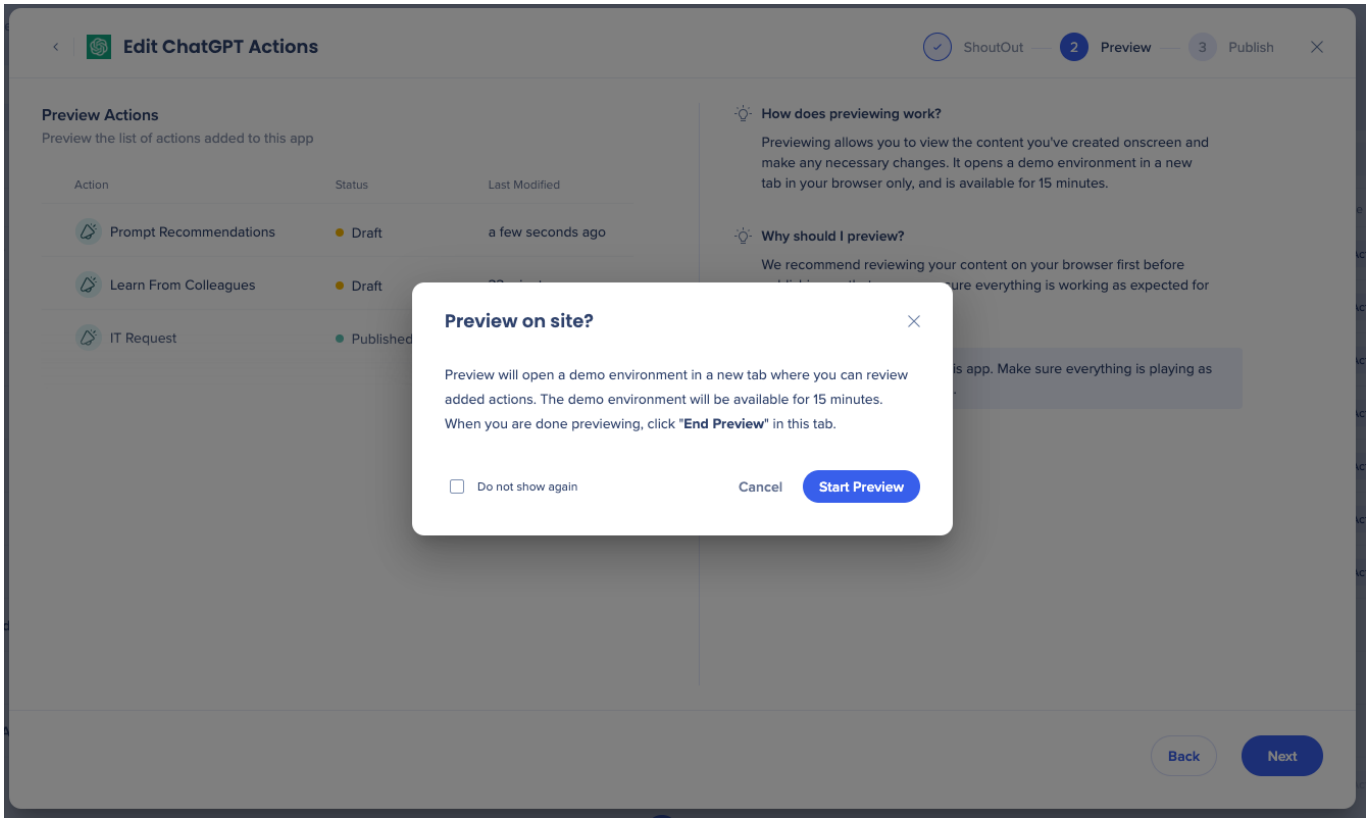
- For example, an action with a weekly frequency will appear only if the day of the test (Preview) is the day this action should be played by definition



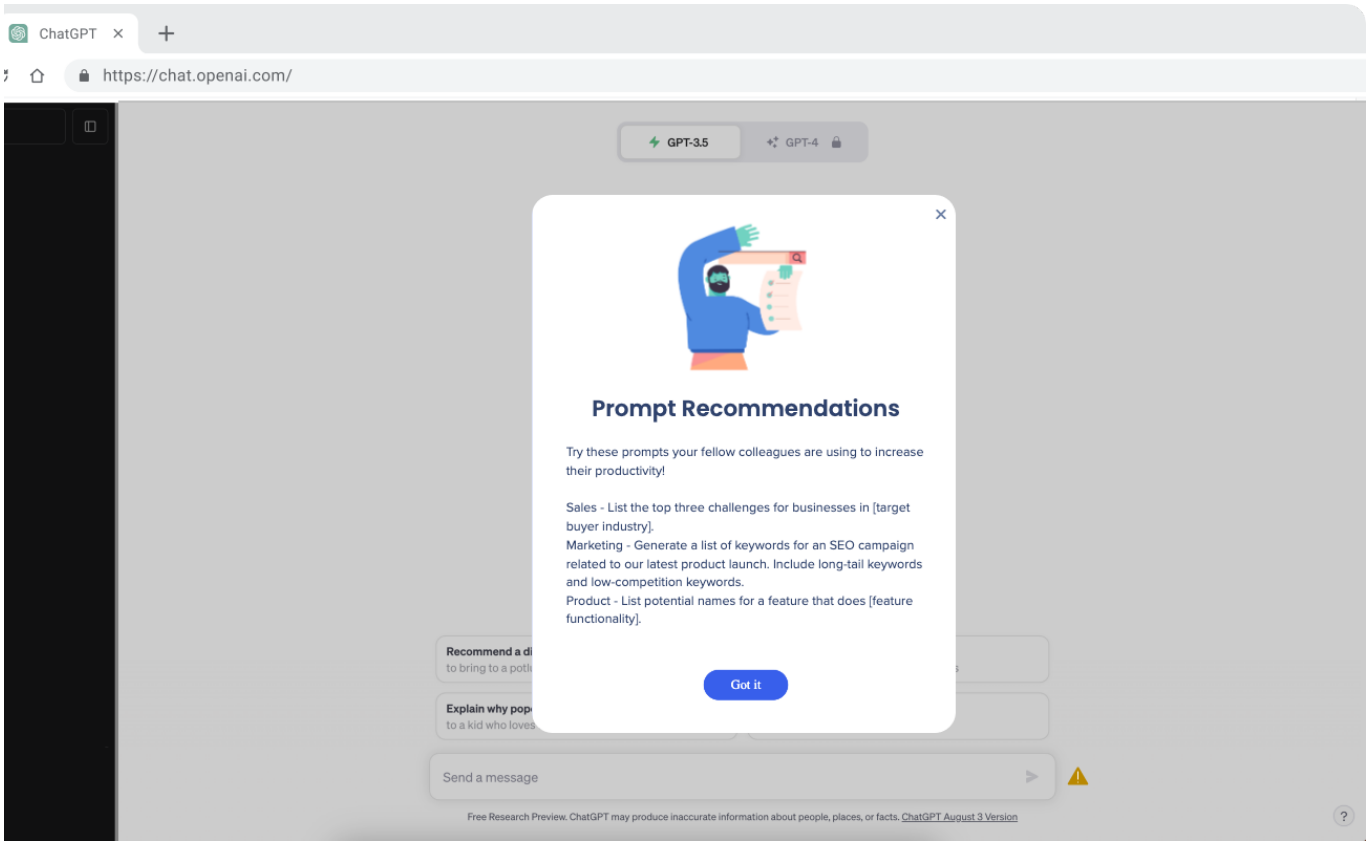
8. Click **Start Preview** and a demo environment will open in a new tab for you to preview and test that your actions are working as expected

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

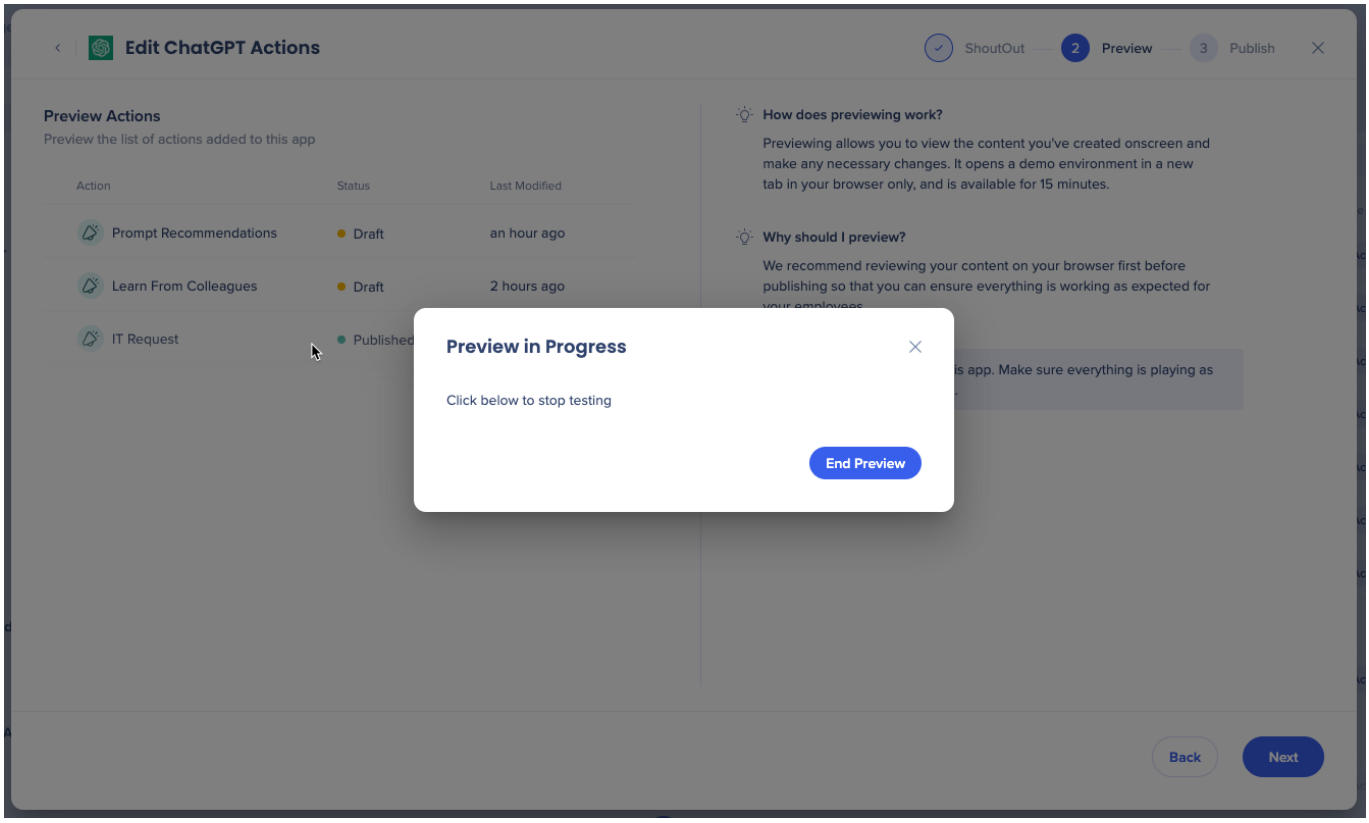


9. Preview your content in the new tab and confirm that everything is working as expected

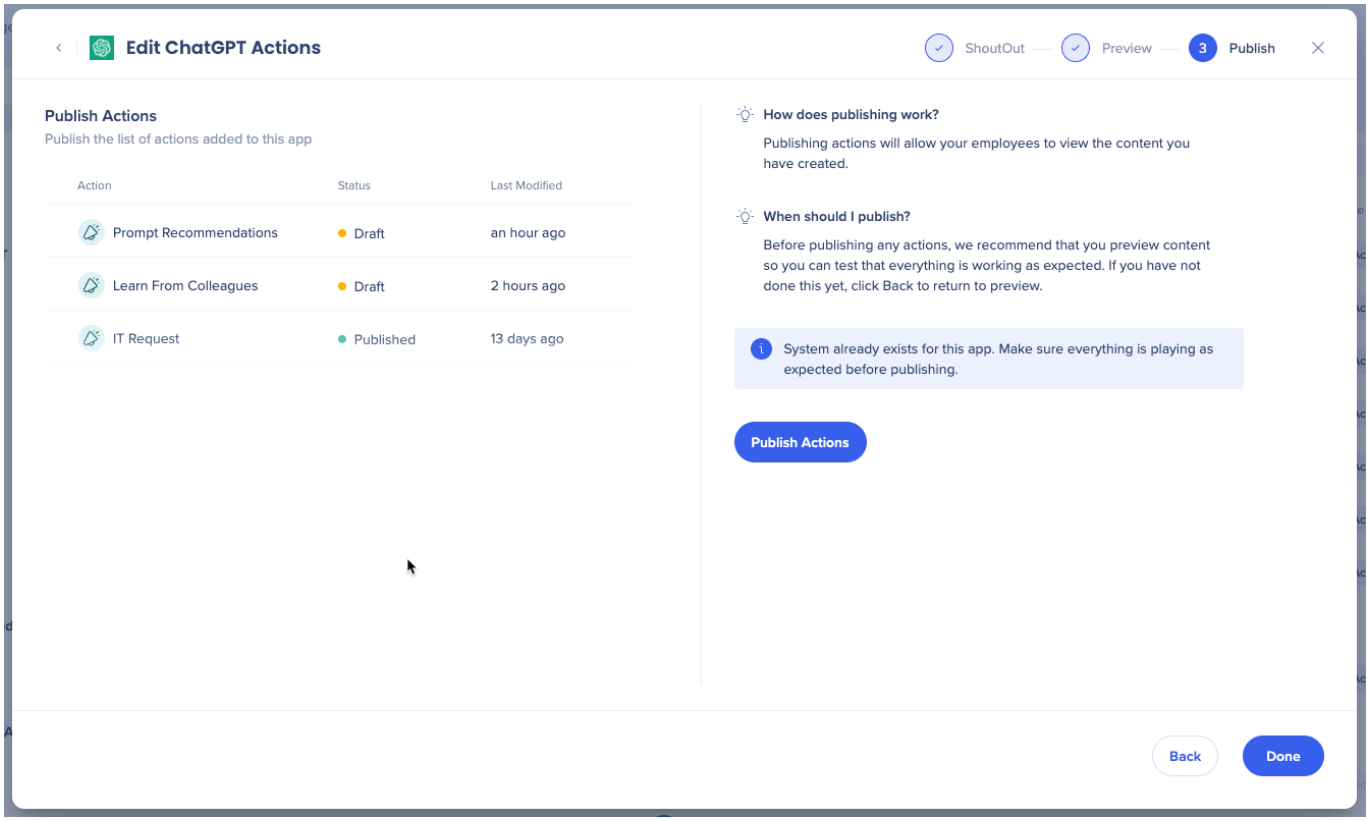


10. Click **End Preview** in the previous tab once you are finished

11. Click **Next**



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

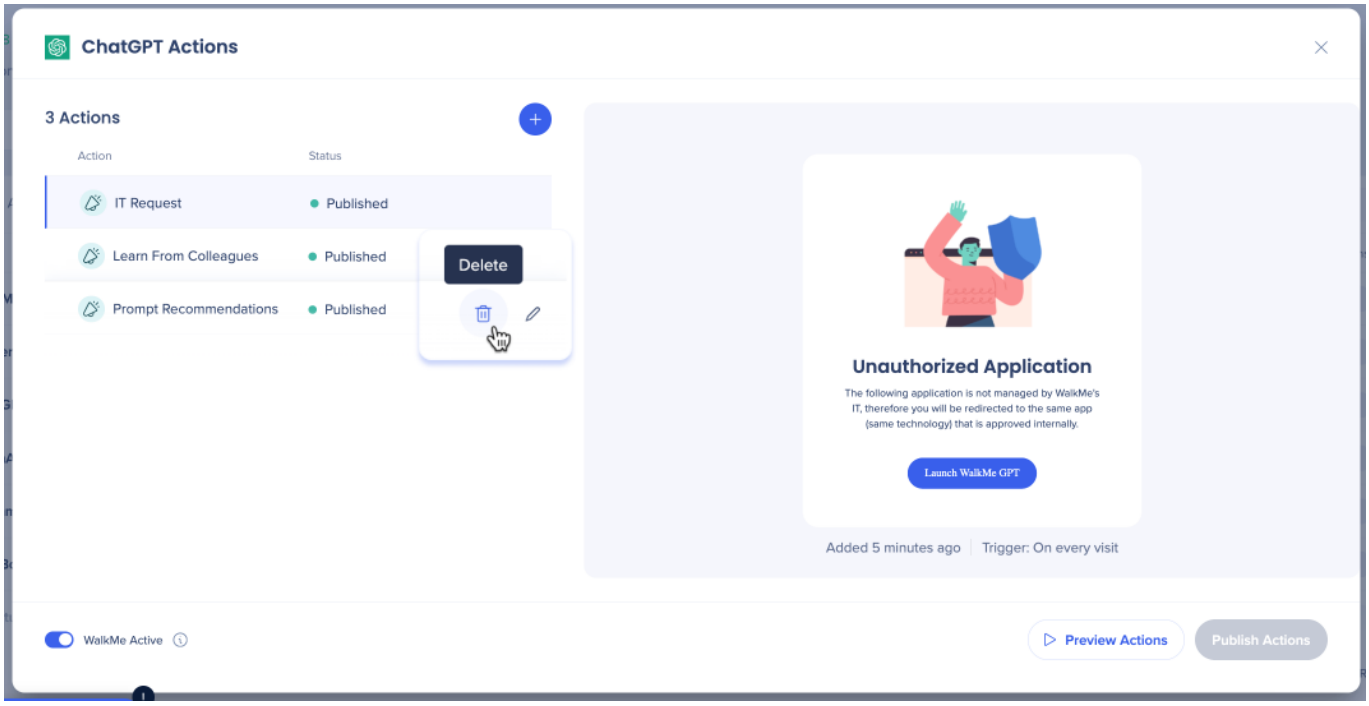


Manage Actions

Delete an Action

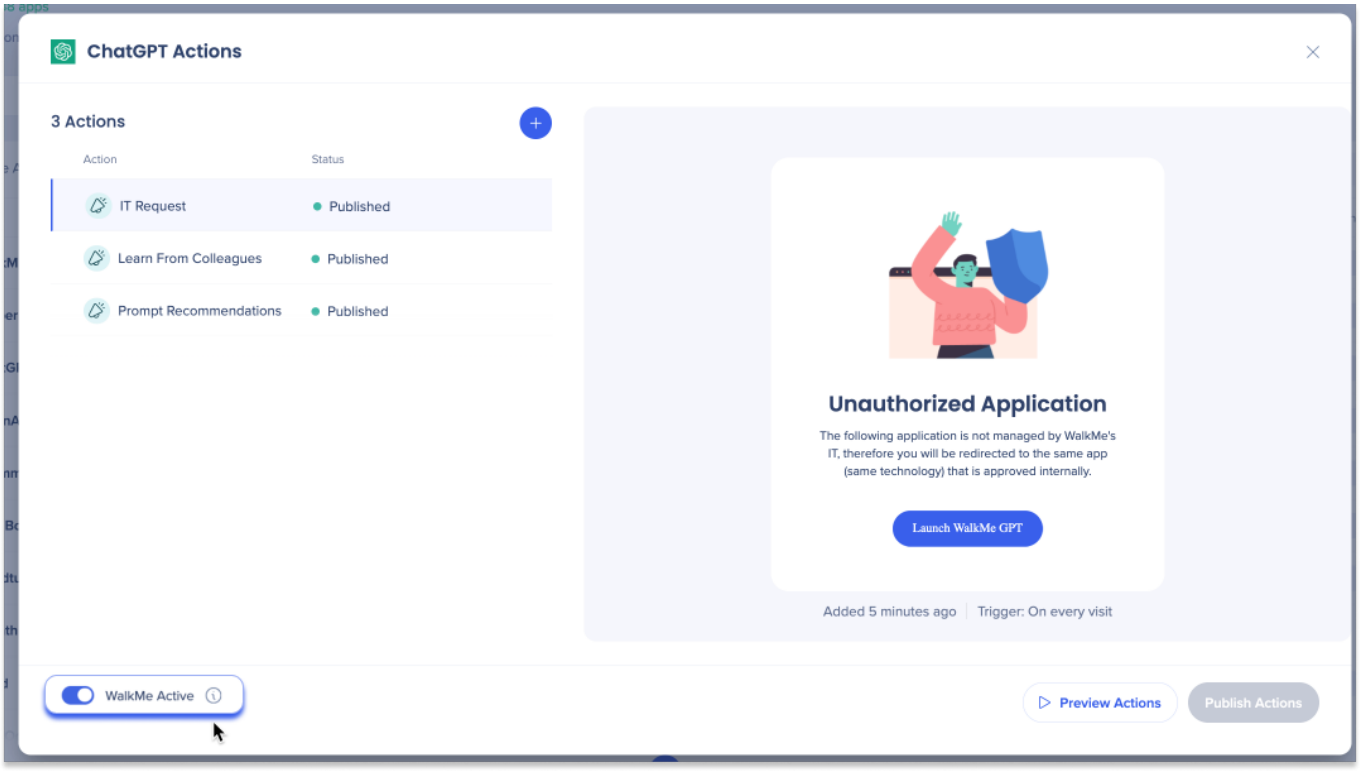
1. Hover over the action you would like to delete

2. Click the **bin icon** to delete



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



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

3. In a published environment, content will play on the first URL reached which matches the app's URL definition
    - 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
    - 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: chrome://settings/content/popups
- 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