

Condition Builder

Brief Overview

Condition Builder is a new WalkMe product expanding the capabilities of the Rule Engine and facilitating the building experience.

The key objective behind this new product is to provide a better user experience for builders and make the process of creating rules easier and more intuitive.



WalkMe Community

Join the conversation in the WalkMe Community!

The supported rule types are:

- Current URL
- Referrer URL
- Element on screen
- Selected element
- jQuery
- Variable
- Cookie
- WalkMe data
- Workday form
- Workday worklet
- Workday subpage
- Workday page
- Workday inbox item
- IDP integration
- CSV integration
- API integration
- Onboarding task
- Behavior based integrations
- Time
- Date
- WalkMe language
- Window size
- Browser type
- Current flow
- Language
- jSON object
- TeachMe course
- TeachMe quiz
- Number/date comparison (previously known as Logic Rule)
- Segment

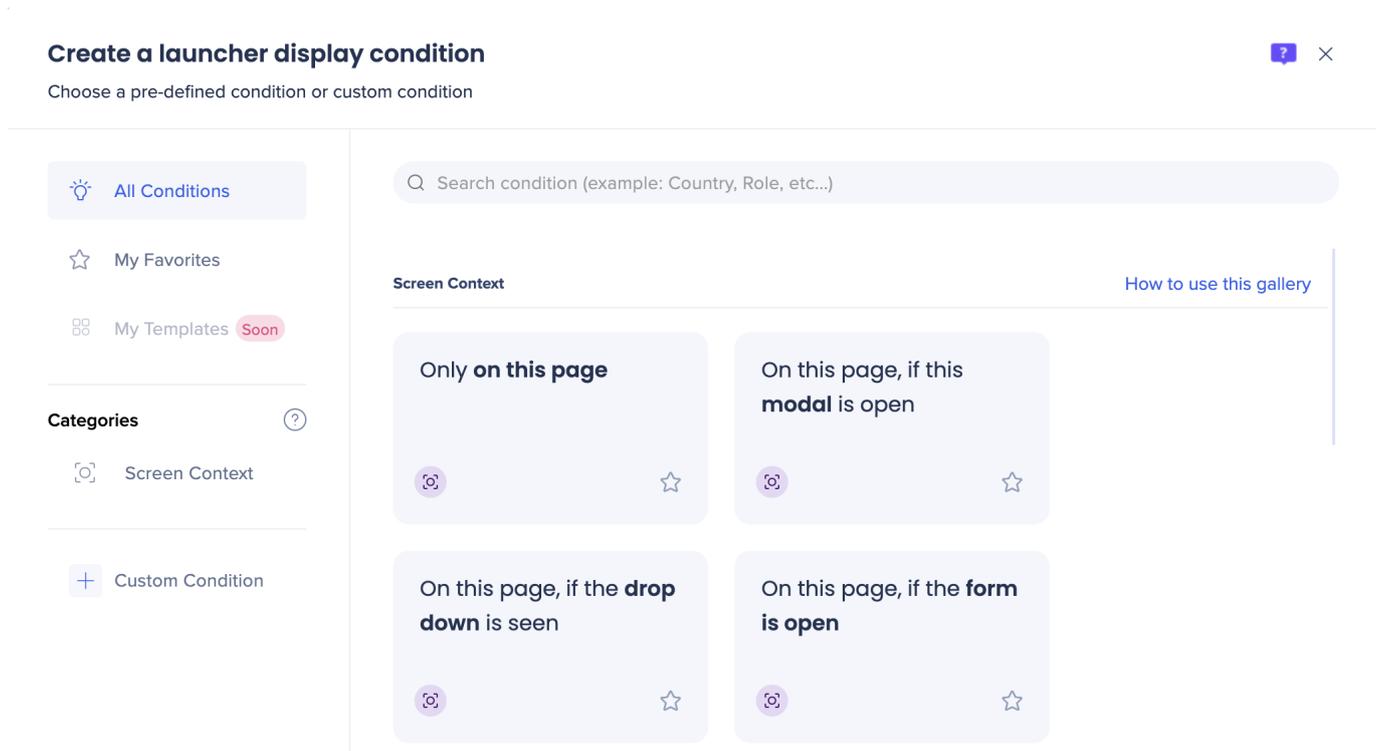
Conditions and Rules

When users open the Condition Builder, they will see templates which describe the most common scenarios for the case they're working on now (e.g. user captured an element on screen and opens the Condition Builder from the Launcher Display Conditions).

Rule types

For more information on rule types, see the [Rule Engine article](#).

Selecting one will get them started with predefined conditions and rules.



Create a launcher display condition ? ×

Choose a pre-defined condition or custom condition

Categories ?

- All Conditions
- My Favorites
- My Templates Soon
- Screen Context
- Custom Condition

Search condition (example: Country, Role, etc...)

Screen Context [How to use this gallery](#)

- Only **on this page**
- On this page, if this **modal** is open
- On this page, if the **drop down** is seen
- On this page, if the **form** is open

Click on the card to see the predefined condition and the suggested rules for how to evaluate it.

The first line is the **condition** - the definition of where the user most likely wants their WalkMe item to appear. Users can type in their definition in the first field - or keep the default one - and select one of the options in the operator dropdown.

< **Create a launcher display condition** ? ✎ ×

Outcome: launcher will only appear if these conditions are met

If this page **is the current page** ▼ 🗑️ 📄 ✎ ^

How to evaluate the condition

🌐 Current URL ▼ contains ▼ 🗑️ 📄 ✎

+

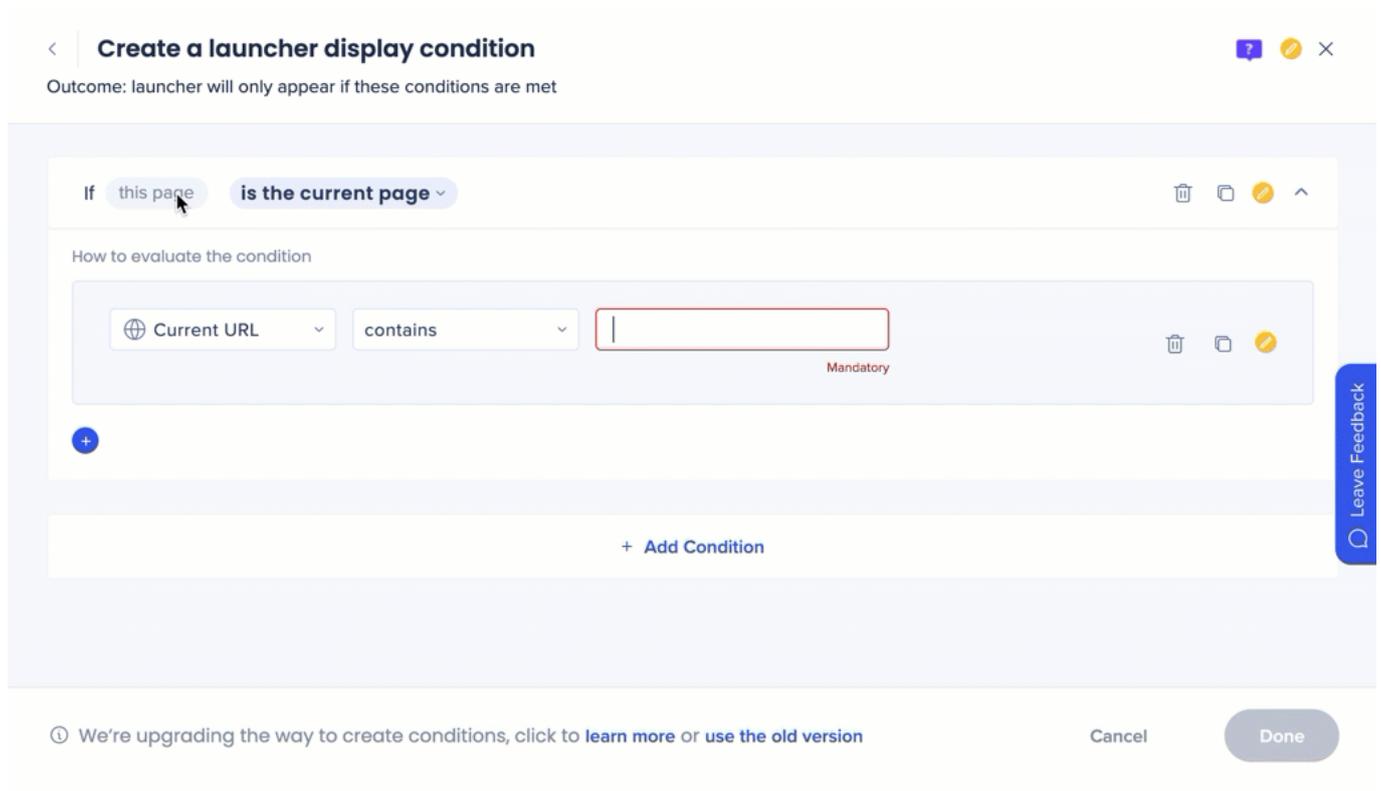
+ Add Condition

ⓘ We're upgrading the way to create conditions, click to [learn more](#) or [use the old version](#) Cancel Done

🗨️ Leave Feedback

Note

The condition line has no impact on the final result. This line and the text in the field are dedicated for notes and won't affect the rule that user creates below.



The second line is the **rule** or **method** that builder would like to use in order to explain what would represent this page and for WalkMe to understand which page to display the item on.

For every condition there's a default rule - what we thought would be the most common way to represent the selected condition. E.g., for when the page is in the edit mode, a common way to define it would be Element on screen (pencil).

However, user can select out of number of rules which are relevant for their case.

For users creating content for the Workday system, the default rule would be "Workday subpage".

Create a launcher display condition

Outcome: launcher will only appear if these conditions are met

If **this page** is the current page

How to evaluate the condition

Current URL contains

+ Add Condition

We're upgrading the way to create conditions, click to [learn more](#) or [use the old version](#) Cancel Done

Leave Feedback

Create a launcher display condition

Choose a pre-defined condition or custom condition

All Conditions

My Favorites

My Templates **Soon**

Categories

- Screen Context
- Custom Condition

Search condition (example: Country, Role, etc...)

- If this page is on **edit mode**
- If this page is on **view mode**
- On this **modal**, if this **error message** shows
- On this page, if this **button is disabled**
- On this **form**, if this field has an **error**
- If this **hidden section** is visible

All the rules that are relevant for the selected condition can be seen under one dropdown.

This has changed compared to the Rule Engine, where rules are grouped under a few categories (e.g. URL → Current URL / Referral URL), and the location of some isn't obvious (e.g. User Data → Cookies / Variable ...).

Create a launcher display condition

Outcome: launcher will only appear if these conditions are met

If **this page** is the **current page**

How to evaluate the condition

- Current URL (selected) contains https://knowledge.walkme.com/p
- Referrer URL
- Element on screen
- Selected Element
- jQuery element
- Variable
- WalkMe Data

And

If Selected Element is seen

How to evaluate the condition

Variable

WalkMe Data

We're upgrading the way to create conditions, click to [learn more](#) or [use the old version](#)

Cancel Done

Leave Feedback

Create a rule to determine when the Launcher displays

Group

Import Rules

⋮

Ud
User Data
▼

Select a Type
▼

📄 🗑️ ⋮

Add Rule

Cookies

Variable

WalkMe Data

JSON Object

Current Statement: Waiting

Save as Segment

Cancel

Done

Rules' Names and Icons

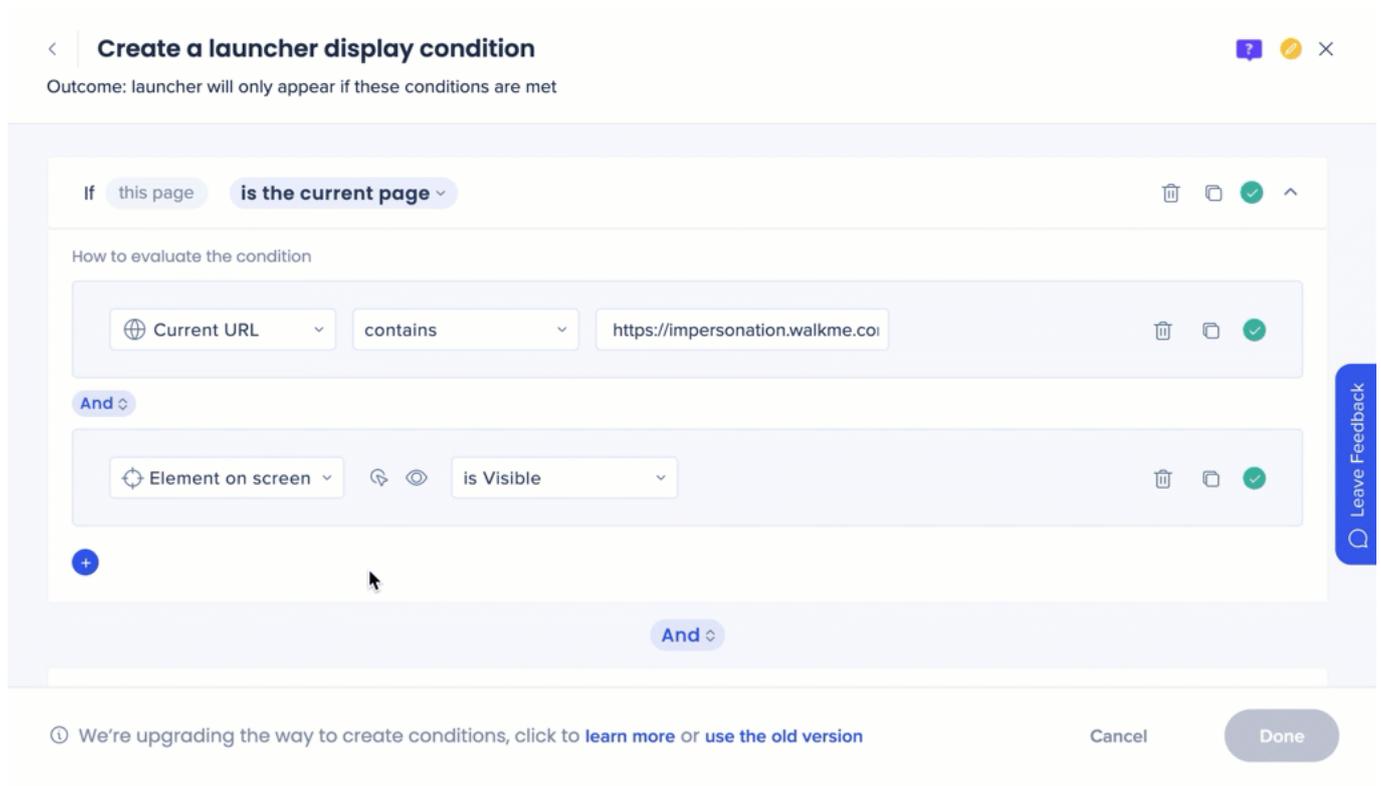
Here are a few changes compared to the Rule Engine:

- On screen element changed to "Element on screen"
- Instead of the "color and initials" icon each rule type had, there is now a unique icon per rule type illustrating the rule

Grouping

Grouping of rules and conditions is done automatically (manual grouping is not possible yet).

When there are two rules under one condition and at least one rule outside of that condition - rules under one condition will become a group.



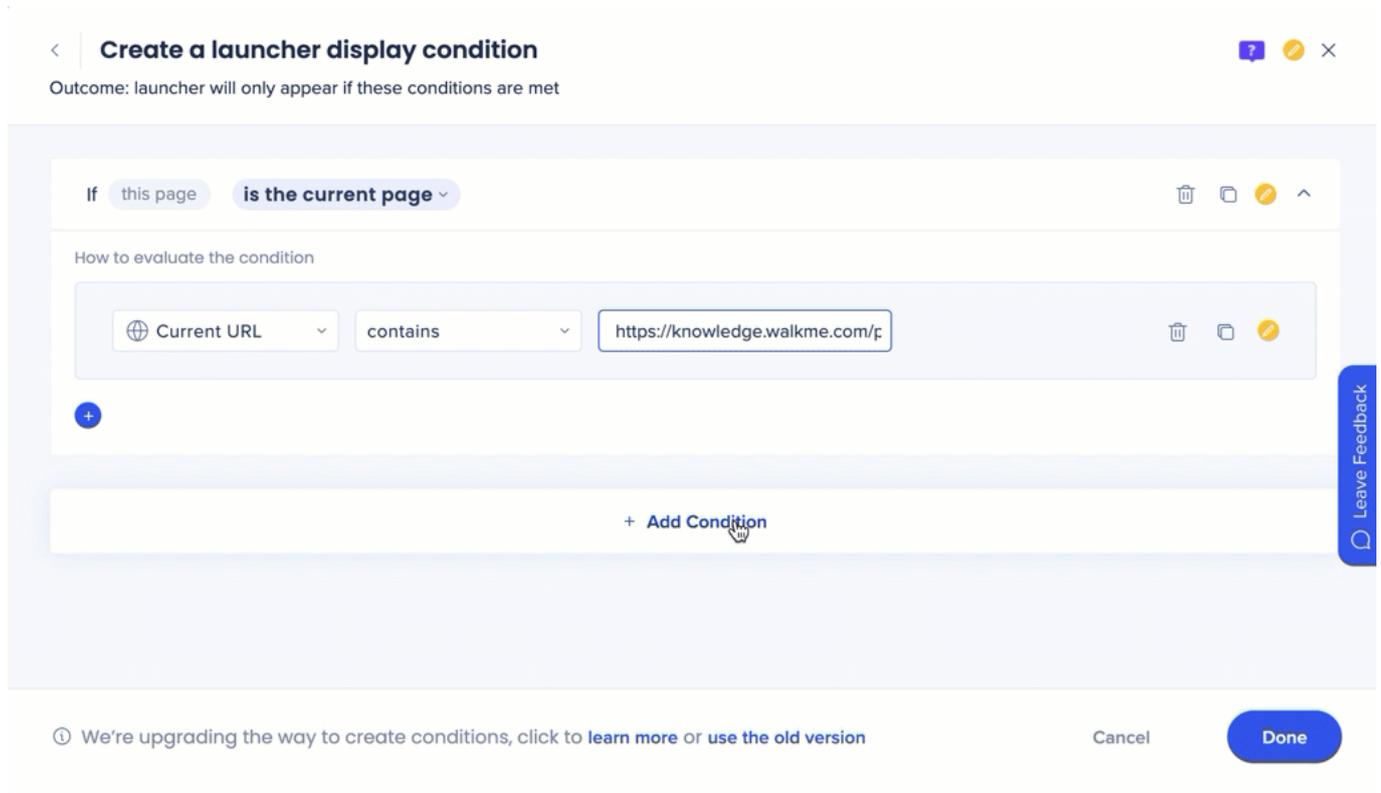
Advanced Condition

While we recommend to work with the suggested conditions which cover the most common use cases and save time, there's also a possibility to create an advanced condition from scratch.

It is designed for experienced builders who wish to work on more complicated use cases and don't find them among the suggested options.

The Advanced Condition template can be reached via the dedicated icon next to the search bar on the conditions options screen.

The title bar will expand based on the amount of text, and all the available methods can be found in the dropdown.



Other Features

Moving rules and conditions around

Conditions and rules can be moved around using drag&drop.

If this page ▼ 🗑️ 📄

How to evaluate the condition

🌐 Current URL ▼ value is like ▼ walkme.com

And ⌵

🔍 Selected Element ▼ 👁️ is visible ▼

And ⌵

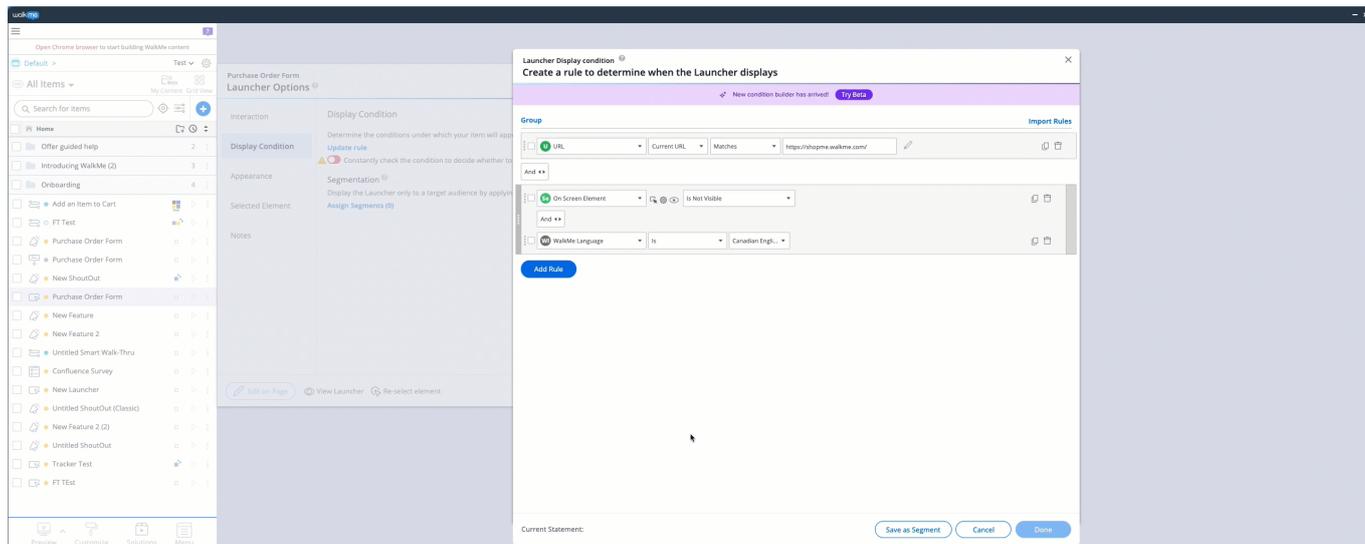
🔍 Element on screen ▼ 👉 selected ▼

+

[+ Add Condition](#)

Moving Between Versions

- When going to the Condition Builder from the Rule Engine, users will be able to see all the existing rules in the same way as they're presented in the Rule Engine
- Although we covered most of the possible cases, there're some rules that temporarily cannot be transferred to the new Condition Builder (we're monitoring those). In case user tries to transfer one of those rules, they'll get a warning message explaining this. They can either continue and lose their rule in the Condition Builder, or go back to the Rule Engine where the rule will be available.



- It is always possible to switch back to the old version of the Rule Engine by clicking on the “use the old version” link on the condition screen.
- Note that any unsaved changes will be lost. However, the conditions which were saved, will be moved to the old version.

