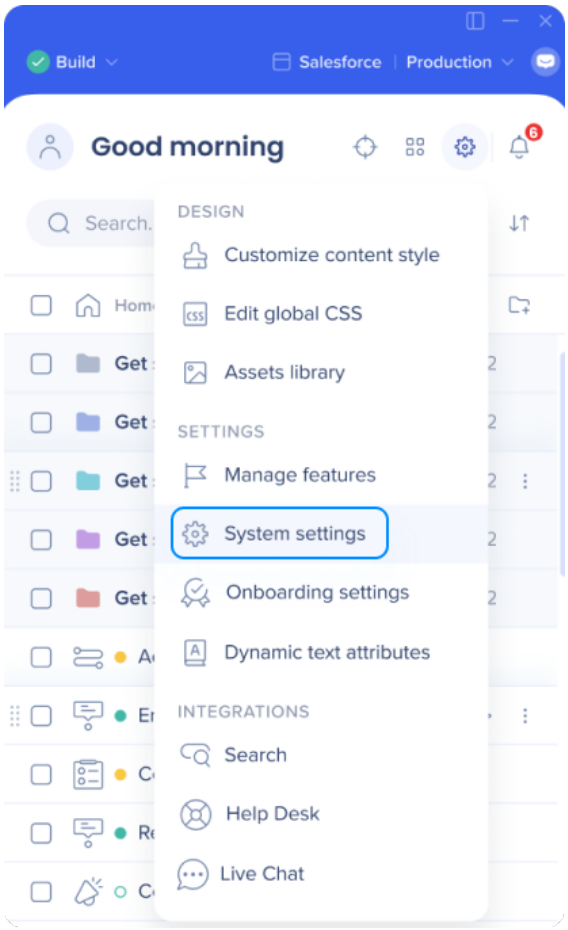
Editor Settings

Brief Overview

WalkMe Editor holds many important settings for the functionality across all WalkMe apps.

You can access the Editor settings by clicking on the setting icon in the top right corner and selecting System settings:

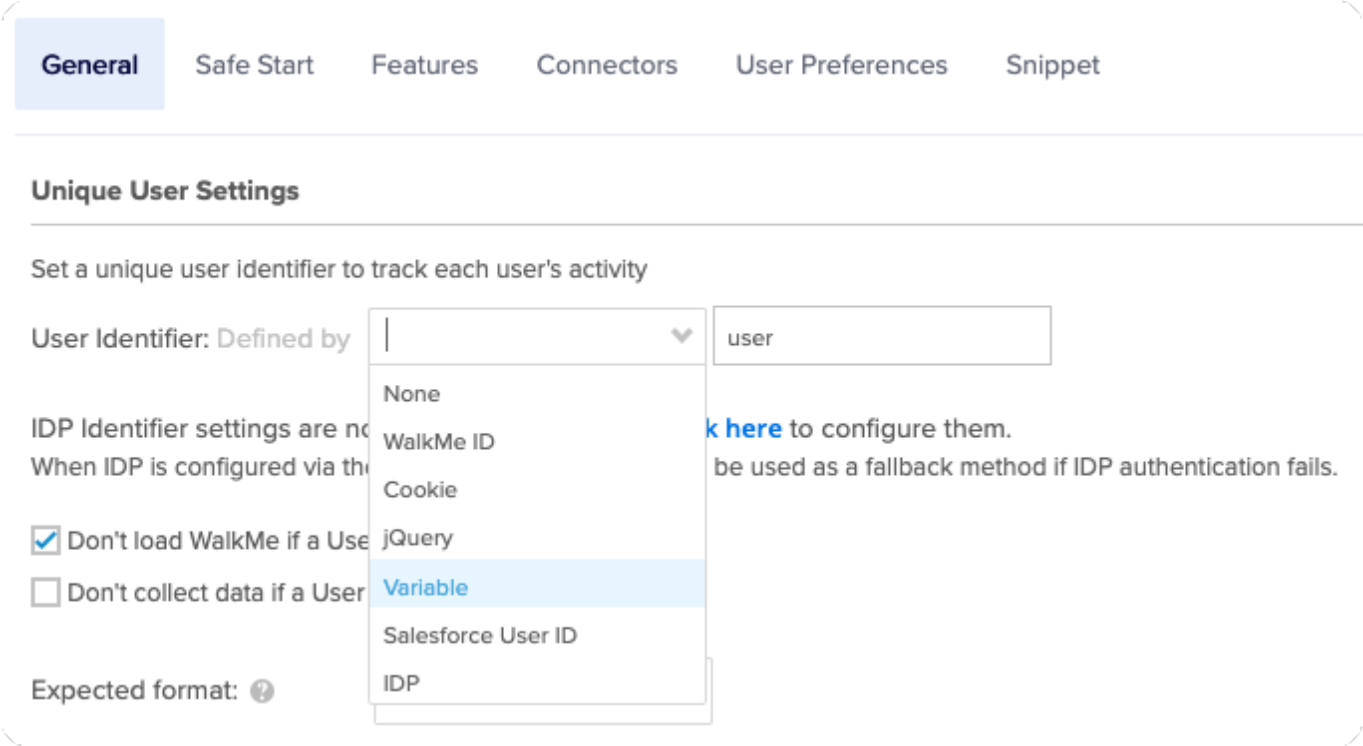


General Settings

Unique User Settings

When building your WalkMe Solutions, consider how you would like to collect data about your end users. For example, when you look up progress or usage supports in Insights, would you like users to be identified by their email address, anonymous ID number, or a unique identifying element on their

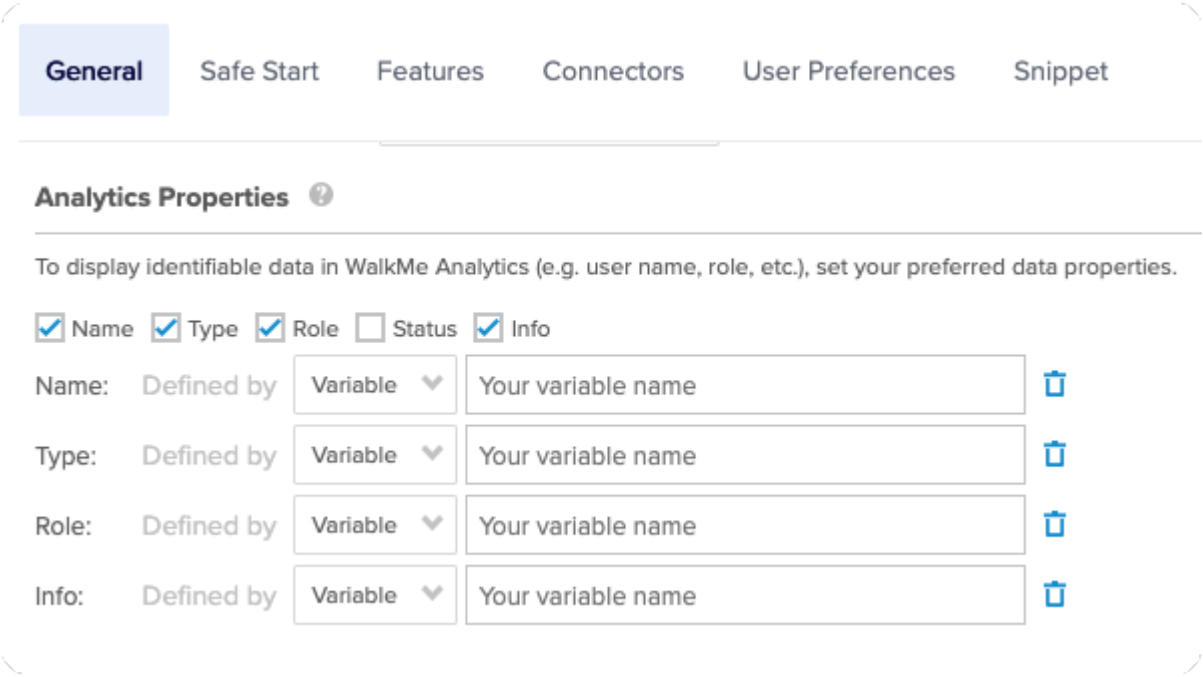
screen. Configure Unique User Settings so all your analytics can be collected in the same terms as the information on your own site, providing a close integration between WalkMe Insights and your own site by identifying the user in the same way.



[Unique User Settings (UUID)]

Analytics Properties

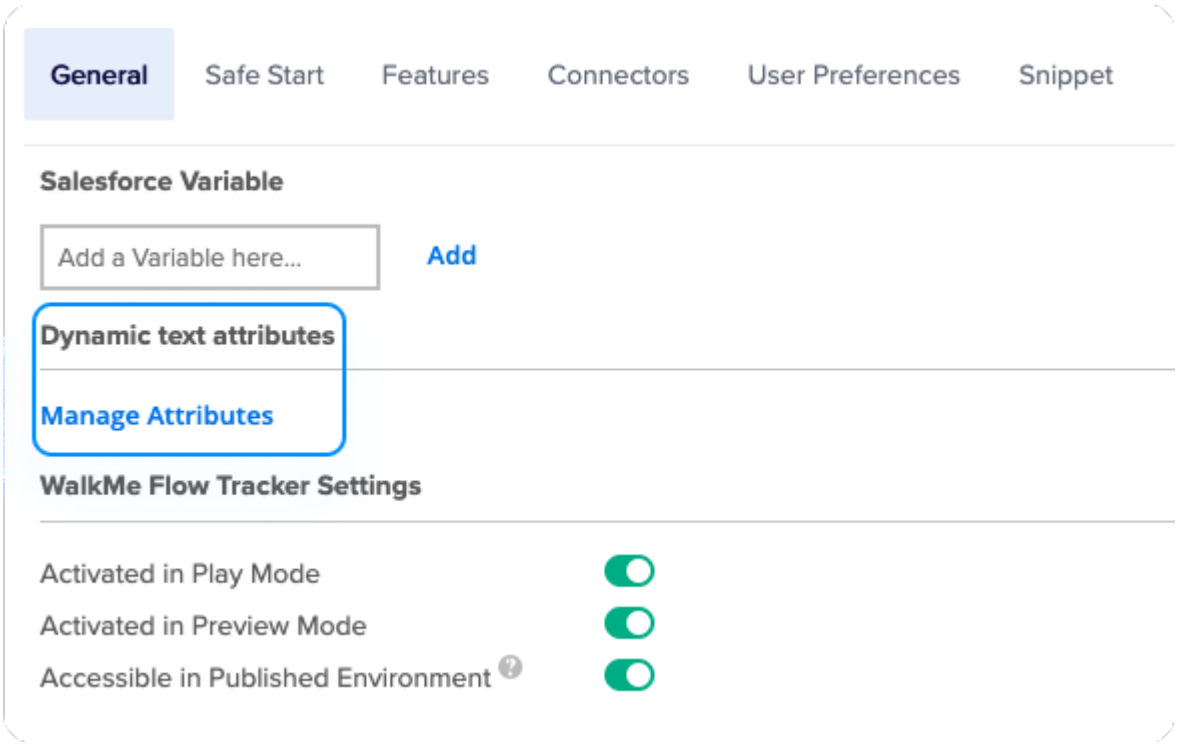
Use analytic properties as custom Insights attributes in the form of variables, jQuery selectors, and website cookies, to better filter your reports for more granular user information.



[Using Analytics Properties]

Dynamic Text Attributes

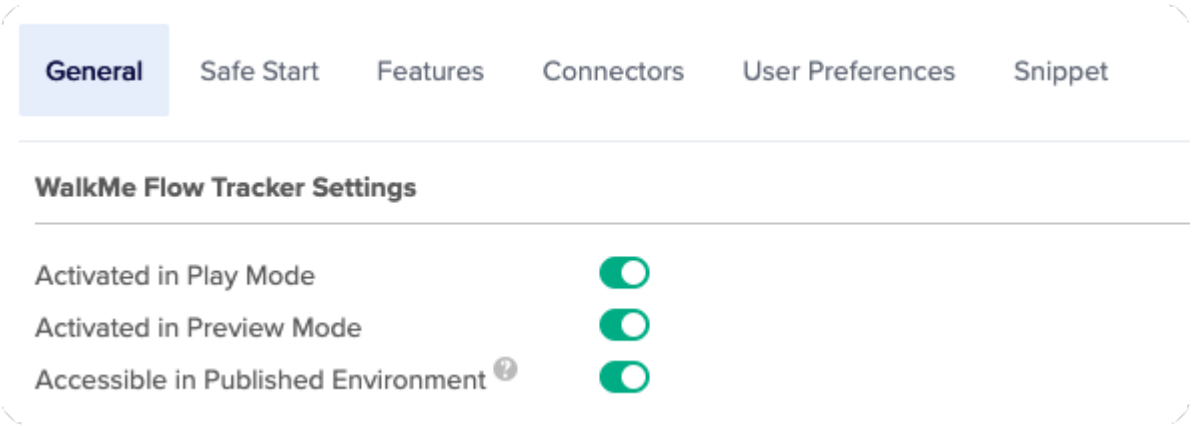
Dynamic text attributes allow you to create dynamic content and rules. Once saved, they can be used in rules (for comparison of text / numbers / dates) and as dynamic text in items.



Dynamic Text Attributes

Flow Tracker Settings

- **Activated in Play Mode** – Flow Tracker automatically launches when a Walk-Thru is played from Editor.
- **Activated in Preview Mode** – Flow Tracker automatically launches when Preview Mode is enabled.
- **Accessible in Published Environment (**QA-Related**)**– Flow Tracker is accessible in the Published Environment but does not start automatically. The keyword 'walkmetracker' is used in the Player Menu Search to activate Flow Tracker.



Flow Tracker

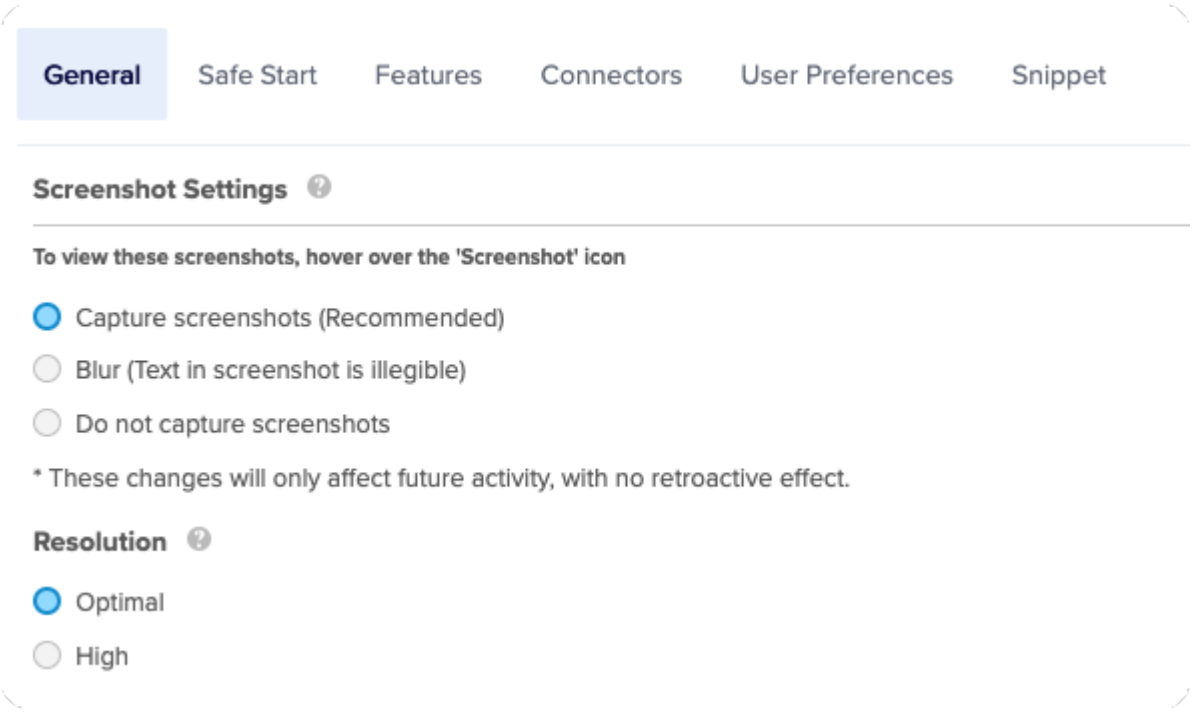
Screenshots Settings

Choose one of the following settings:

- **Capture Screenshots:** Selecting this option will enable the screenshot feature
- **Blur Screenshots:** Blur the screen in the screenshot to protect sensitive information while keeping the balloon and element clear
- **Do not capture screenshots:** This will disable the feature and prevent screenshot from being captured

Choose your desired resolution:

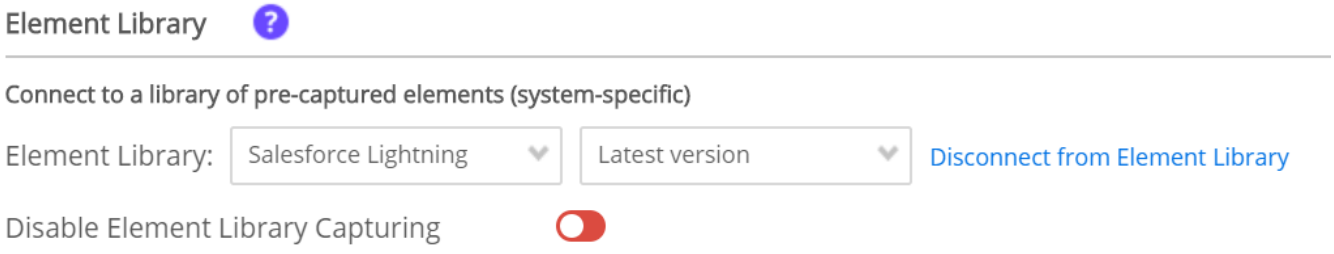
- **Optimal:** Default setting – Optimized for high performance
- **High:** Saves image in its original resolution



[Screenshots]

Element Library

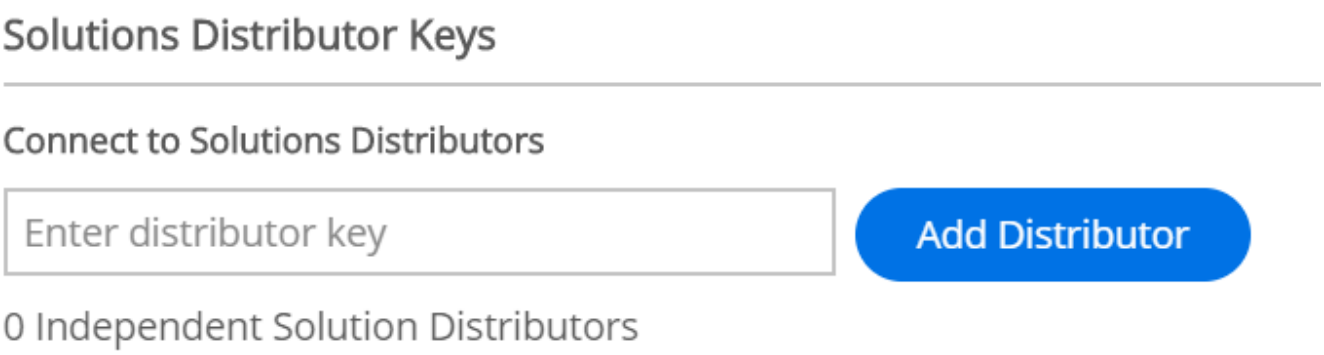
WalkMe's Element Library feature is made up of pre-captured, system-specific elements created using WalkMe best practices. Users can build deployables by selecting an element from the Element Library, outlined in green instead of the standard blue, allowing WalkMe to maintain and update the connected deployable through major platform releases.



[Element Library]

Solutions Distribution

My Solutions are user-generated templates that allow you to stay up-to-date with your organization or partner's latest brand guidelines, campaign, or content recommendations by easily sharing content between accounts. Then, using a secured distribution key, you can easily share the solution package that you've built between editor accounts.



[My Solutions Templates]

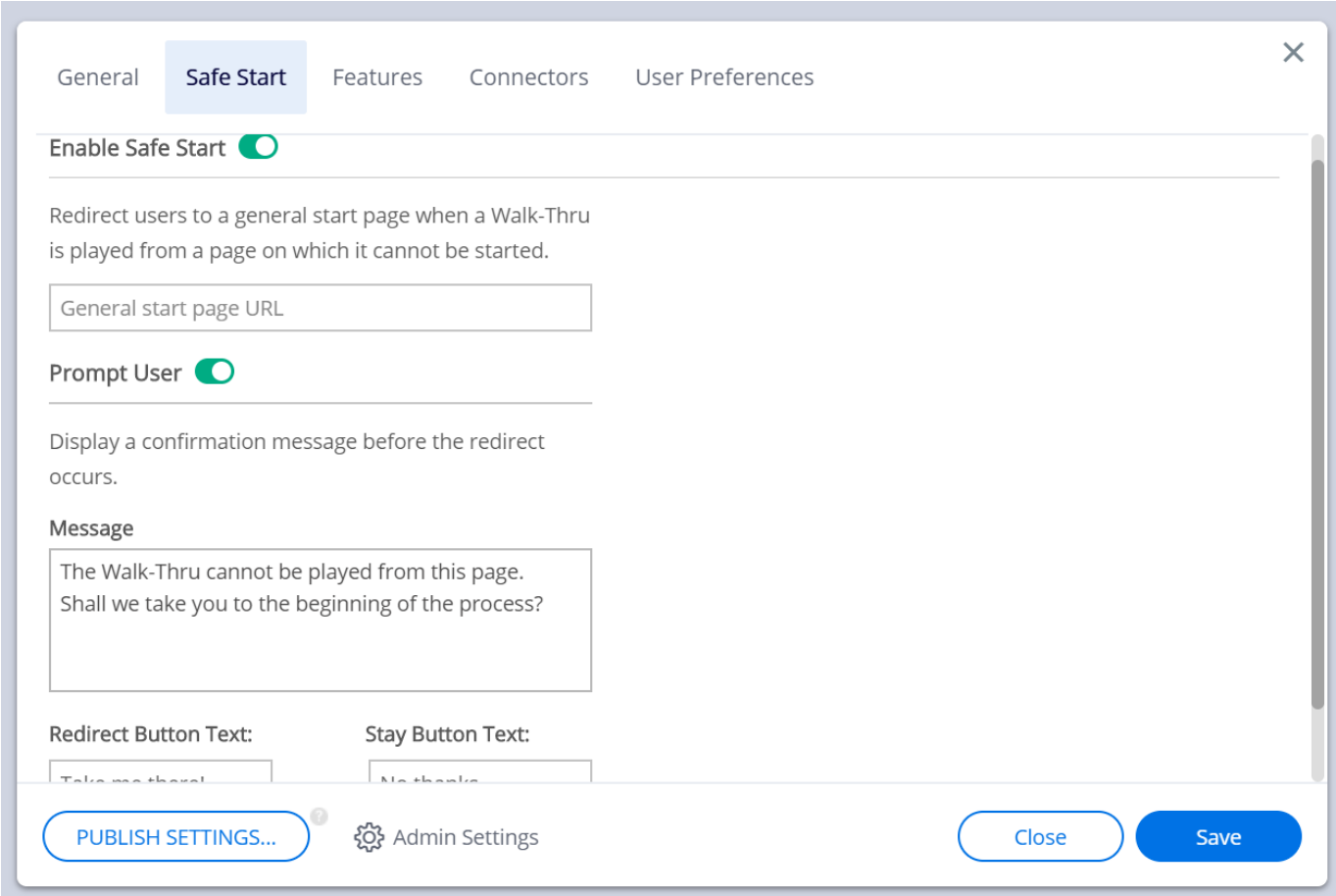
Auto-Step Settings

Auto-Steps allow customers to automate repetitive processes that end-users will have to complete multiple times. By default, a ripple effect will show when an Auto-Step has been clicked. This can be disabled in the settings.

[Auto-Steps: Getting Started Guide]

Safe Start

Redirect users to a general start page when a Walk-Thru is played from a page on which it cannot be started.



Using Safe Start

WalkMe Community

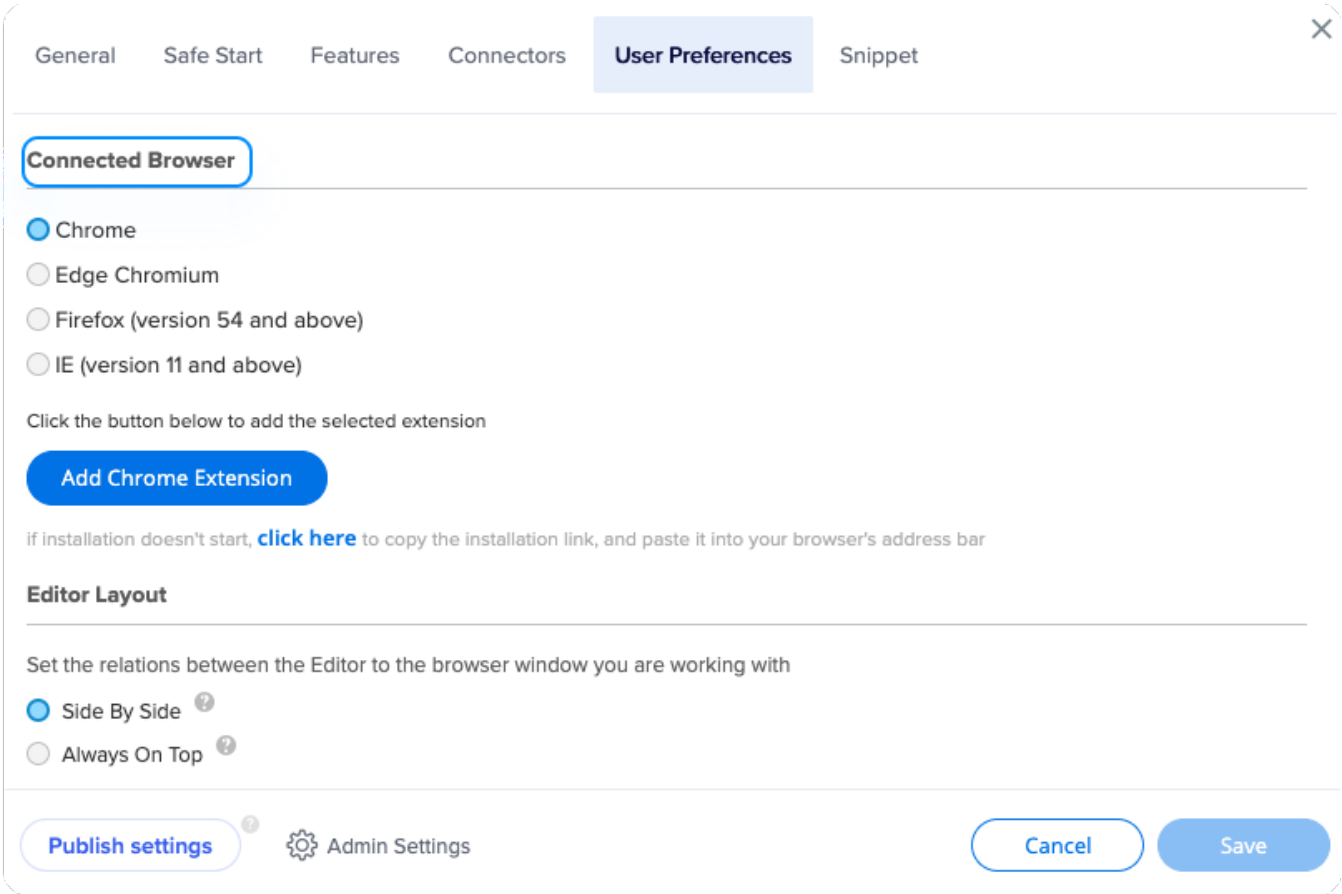
Join the conversation in the WalkMe World Community for more tips and tricks!

User Preferences

Connected Browser (per system)

Note

If you change this setting, it will affect all the users in this system.



Editor Layout

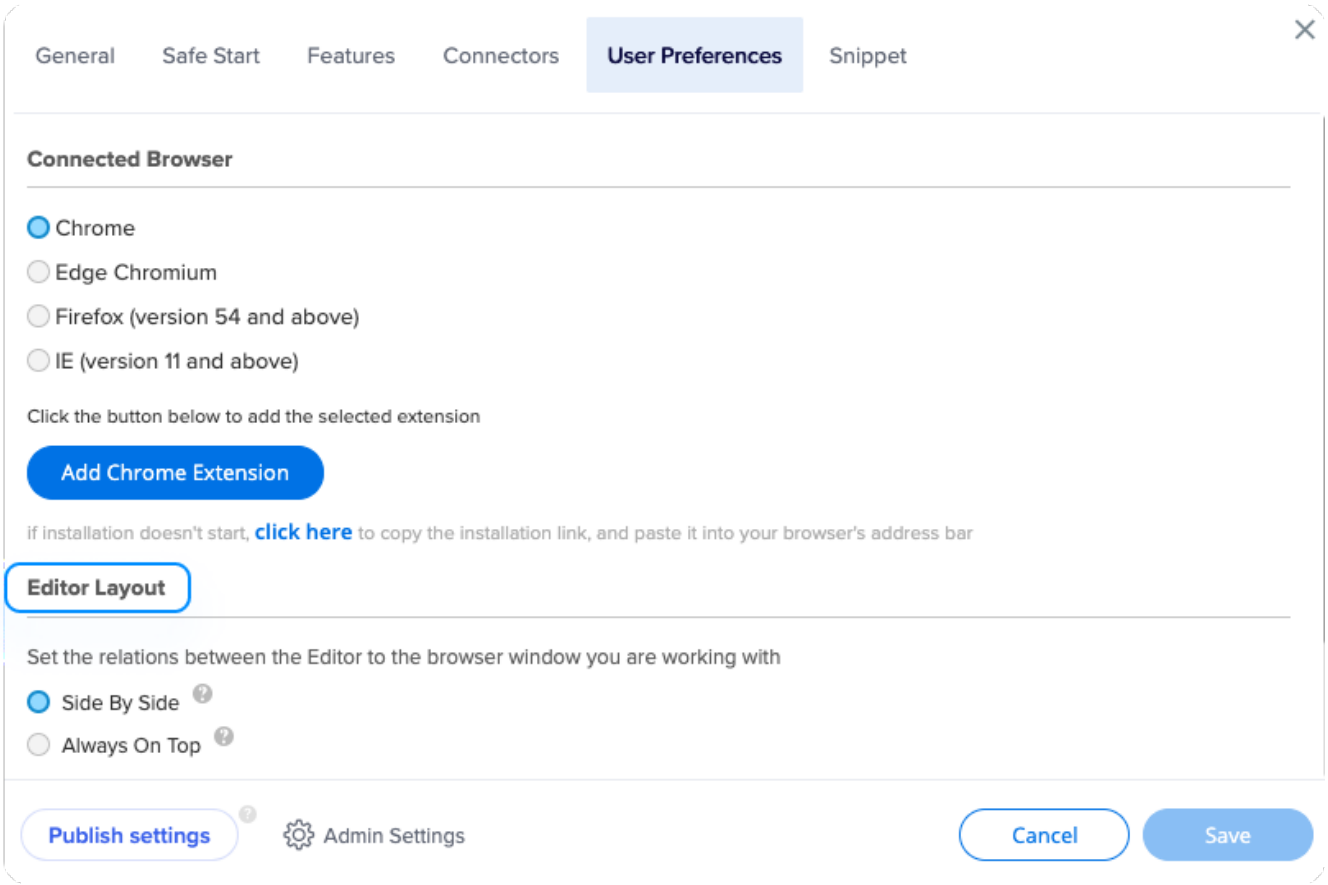
Two layout modes are available for the Editor:

1. **Side-by-Side (SBS)**– Allows for the Editor and the connected browser to align themselves side-by-side.
   This is the default layout. It is recommended for working on most websites.
   - To align the Editor to the connected browser make sure you have an instance of the connected browser open and press the SBS button.
   - The Editor will align itself side-by-side to the connected browser's instance that is in the foreground.
2. **Always on Top**– Positions the Editor on top all other windows.
   Recommended for sales presentations and working on websites that require the browser to be full width.
   - In this mode, the Editor floats above all other windows.
   - If you find the Editor obstructing your window's view, press the minimize button to minimize the Editor to the taskbar.
   - Press the WalkMe icon on the taskbar to return to working on the Editor.

The Editor's layout mode can be changed at any time.

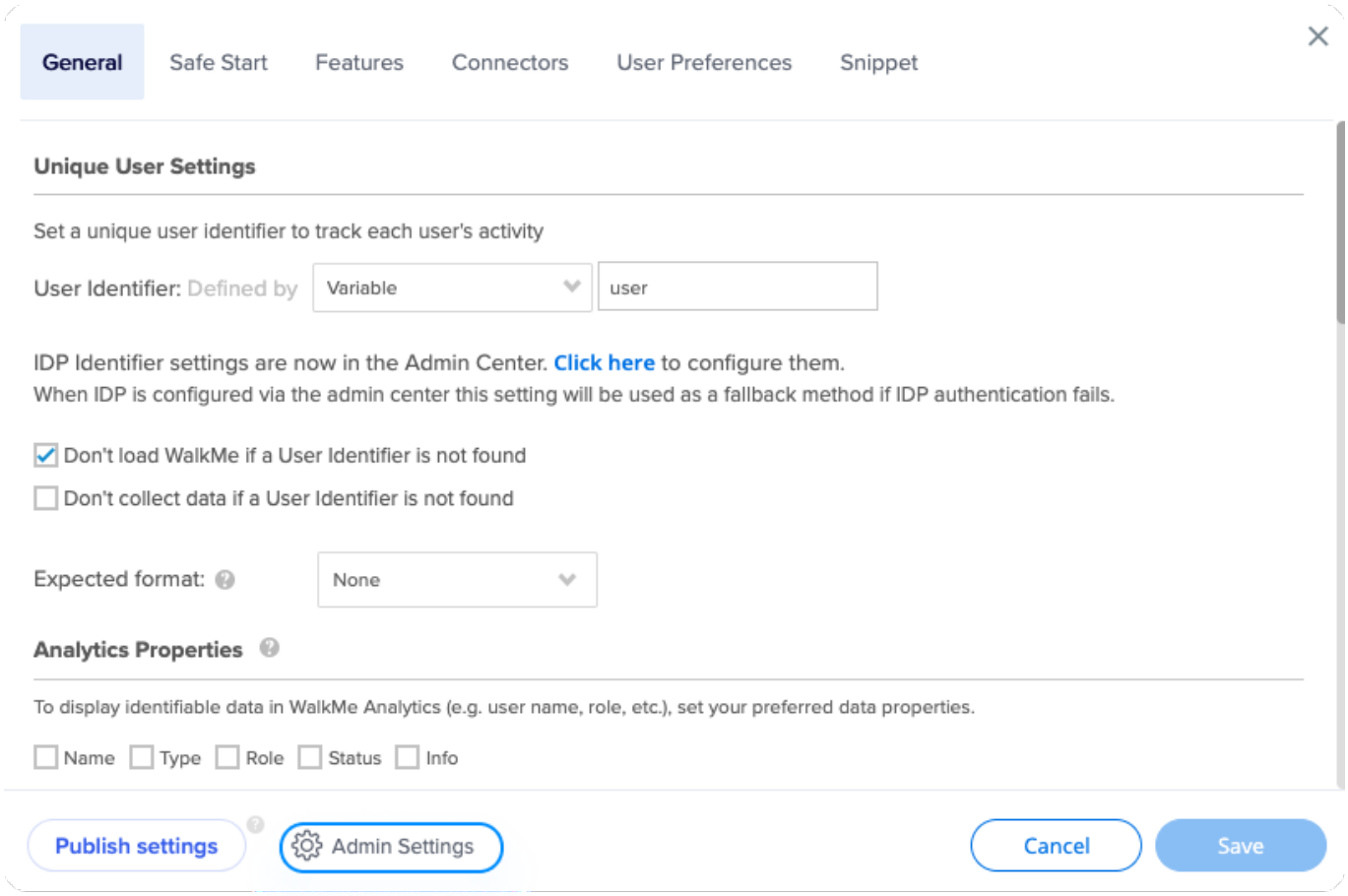
You can also set the maximum width of the Editor:

- Change from Full Screen to Max width and enter the desired width size of the Editor (Minimum of 1500px).
- ⚠ **Note:** Afterwards you must refresh the Editor.



Admin Settings

You can access Admin Settings by clicking the “Admin Settings” button in the Editor Settings:


General
Safe Start
Features
Connectors
User Preferences
Snippet
Unique User Settings
Set a unique user identifier to track each user's activity
User Identifier: Defined by
Variable
user
IDP Identifier settings are now in the Admin Center. Click here to configure them.
When IDP is configured via the admin center this setting will be used as a fallback method if IDP authentication fails.
Don't load WalkMe if a User Identifier is not found
Don't collect data if a User Identifier is not found
Expected format:
None
Analytics Properties
To display identifiable data in WalkMe Analytics (e.g. user name, role, etc.), set your preferred data properties.
Name
Type
Role
Status
Info
Publish settings
Admin Settings
Cancel
Save