

Editor – The WalkMe Builder Experience

WalkMe Editor

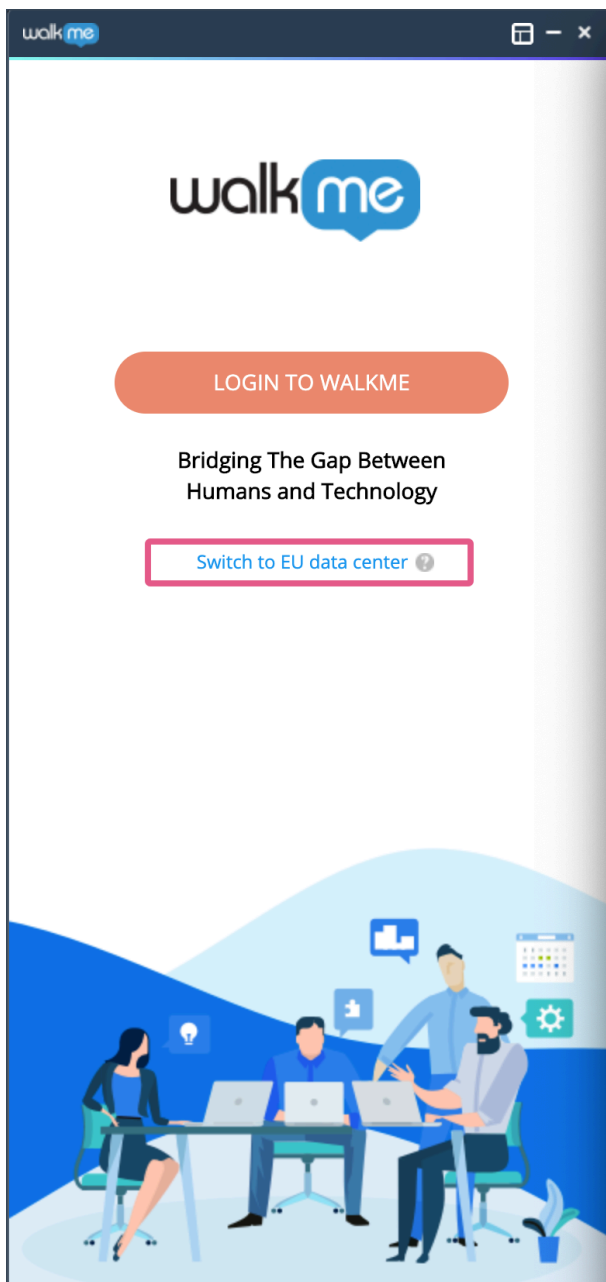
The WalkMe Editor is used for building, managing, and publishing Smart Walk-Thurs and the other WalkMe Apps. Once the Editor is installed on your computer, simply download the Extension to your selected Browser to start building.

For more detailed guidance on how to install WalkMe Editor, please follow the instructions in our [Support article](#).

Site Configuration

Switching Editor Platform

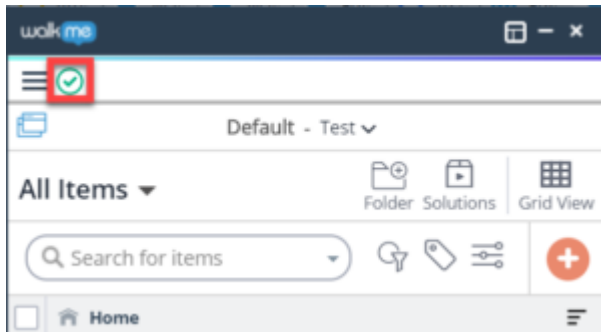
To switch between EU and US Editor versions, if you are already logged in, log out of your Account in the Editor. Click the following button:



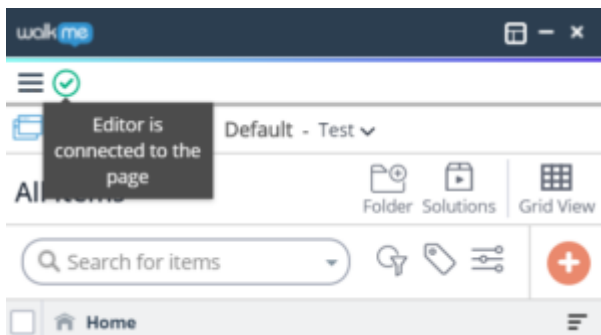
Sign in again.

Editor Connection Indicator

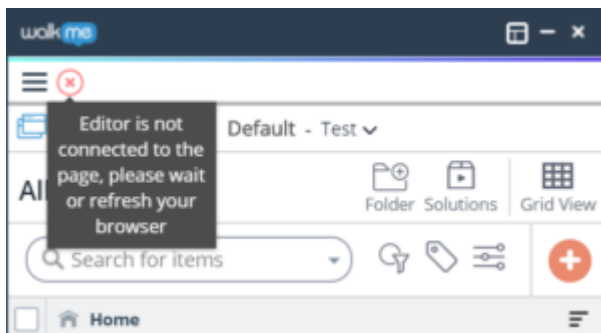
When you are ready to begin building your WalkMe solutions, it is important to make sure that the Editor is connected to your browser, this enables you to capture elements on the screen successfully and use them in your build.



Use the **WalkMe Connection Indicator** to make sure that you are connected at all times. If the Indicator is green, you are connected:



If the indicator is red, you are not connected:



If you are not able to connect, it is recommended to double-check your configurations and restart. If you are still experiencing problems, contact our Support team.

Unique User Identifier

When building your WalkMe Solutions, consider how you would like to track 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.

It is recommended to 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.

Use Cases

Some examples of what enabling Unique User Settings allows you to do include:

- Check an individual's progress and that they are reaching their WalkMe goals;
- Set up an Onboarding task list that must be completed by each individual user;
- Track the number of unique users that see WalkMe on a monthly basis;
- Collect email address of your WalkMe end users;
- Enabling users to see Onboarding tasks crossed off their Onboarding list;
- Configure Walk-Thrus and ShoutOuts to play automatically.

How It Works

There are several supported options for Unique User Settings:

- *WalkMe ID*: Use a unique ID generated by WalkMe, functioning similar to a cookie based UUID;
- *Cookie*: Use a cookie stored on the user's browser;
- *jQuery*: Use an HTML element using a jQuery selector;
- *Variable*: Use a javascript window variable on your site;
- *None*: Do not track unique users (Onboarding tasks will not cross off and AutoPlay cannot be used).
- *IDP Integration* ([Support Article](#))

Segmentation

Segments allow you to divide your WalkMe content into different "use cases" and to push items to specific users or to remove items from a user's view according to the segment you defined.

For example, to make a Smart Walk-Thru visible to some user groups but not others, you can segment it using the Segmentation Center, to only display to specific users by creating a rule according to an existing variable, URL or another element.

Purposeful Segmentation is an important part of your builds. If WalkMe items aren't relevant to certain users or under certain conditions, they can be hidden using segmentation. This will

allow your users to focus on the available tasks and reduce clutter on the screen and in the Player Menu.

Segments can be created with any of the buildable conditions from the Rule Engine. For example, you can create segments to organize and filter your WalkMe items by variable, date, on-screen element, or even by URL.

How It Works

Before any of the items in a segment appear in the Player Menu or on-screen, WalkMe will check that the associated rule is true. Any rule type can be used to create a segment. In most cases, a segment is only checked once when the page loads, and therefore, it cannot be based on an on-screen element that does not appear immediately on the page.

Most apps in the Editor can be segmented to appear for target audiences: Walk-Thrus, Launchers, Resources, Shuttles, Surveys, Smart Tip Sets, and ShoutOuts can each have segments (Help Desk and Live Chat cannot be segmented).

Segments can be applied in two ways: globally through the Segmentation Center or locally to an individual item. Items with no segment will always appear.

If you are planning to Segment WalkMe content based on your audience, please make sure these values are exposed on your site, as variables, HTML elements or cookies.

More information regarding Segmentation can be found in our [Support article](#).

Multi-Language

WalkMe supports Multi-language content, which allows you to add translations to WalkMe Items you've created in order to support a global audience.

Users either select the language from a toggle in the Player Menu, or you can configure WalkMe to change the language automatically. Translations are done from the ACCOUNT tab which is accessed from Insights. WalkMe does not translate text you create, though we do allow you to export either an XLIFF file, which is used by popular localization services, or an .XLSX Excel file, which is better suited to human translation.

Additionally, should you desire to only translate a portion of a WalkMe item's text, you now have the option to export and import specific items' text, as opposed to all text at once.

For more information on Multi-Language, including recommended ways to configure it, please

check out our [Support article](#).

Accessibility

WalkMe strives to support the AA standard of the Web Content Accessibility Guidelines 2.0 (WCAG 2.0), one of the leading specifications defining standards of accessibility for the web. This standard defines three levels of conformance: A (lowest, 25 success criteria), AA (13 additional success criteria), and AAA (highest, 23 additional success criteria). WCAG standards are organized around four basic principles:

- Perceivability—information presented may not be invisible to all of the end-users' senses
- Operability—end-users must be able to operate the interface
- Understandability—end-users must be able to understand the information presented
- Robustness—end-users must continue to be able to access the content, even as new technologies are incorporated into the content

If you are planning to perform an Accessibility Audit, please make sure to notify your WalkMe team.

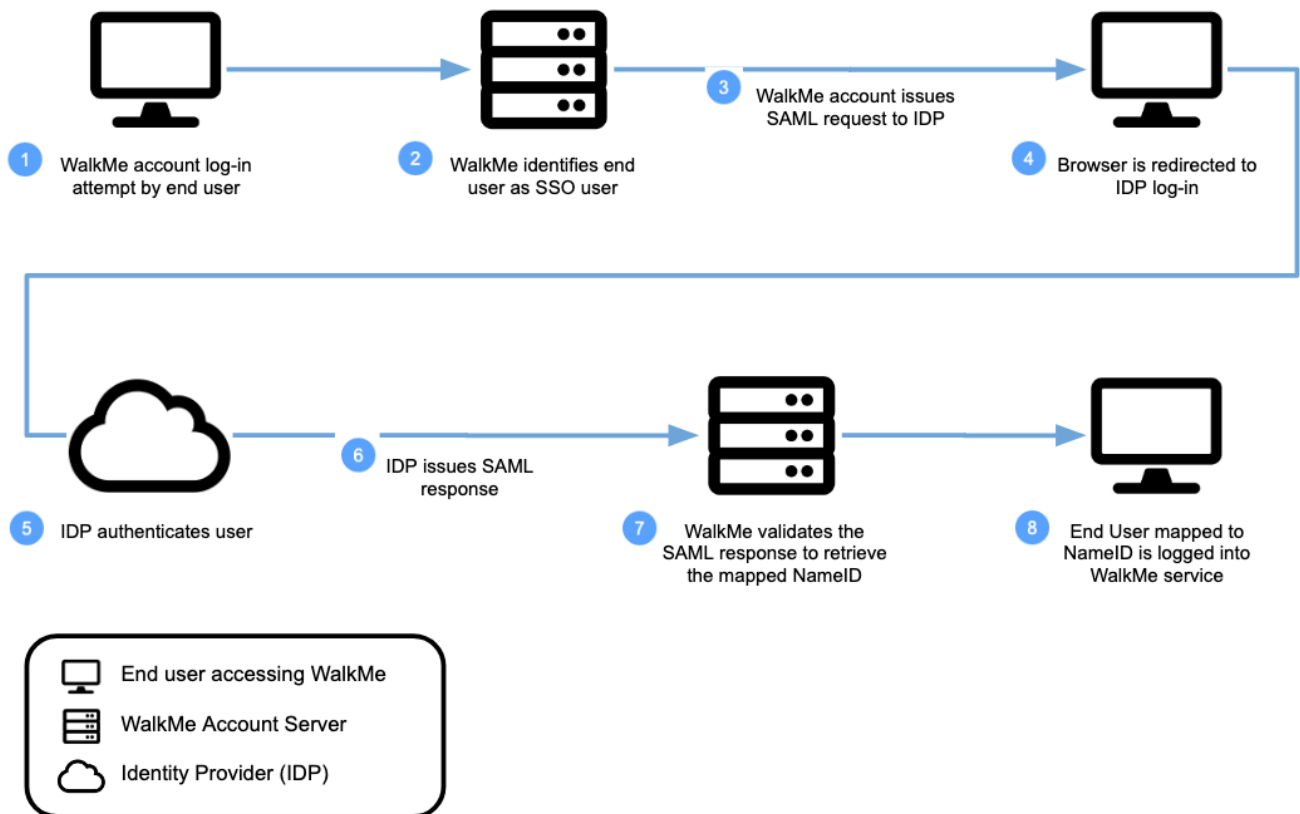
More information on Accessibility Settings can be found in our [Support article](#).

Single Sign On

The WalkMe editor and Insights supports Single Sign On (SSO) using SAML 2.0. SAML is an OASIS approved standard used for implementing SSO.

How it Works

- When SSO is enabled, clicking on the “Login” button in the editor will redirect the browser to the SSO login page.
- When WalkMe receives the SSO Response, it will read the user's Name ID and check for that Name ID on the WalkMe User.
- If WalkMe can find the Name ID on a WalkMe user, the editor will then be logged in as that user.

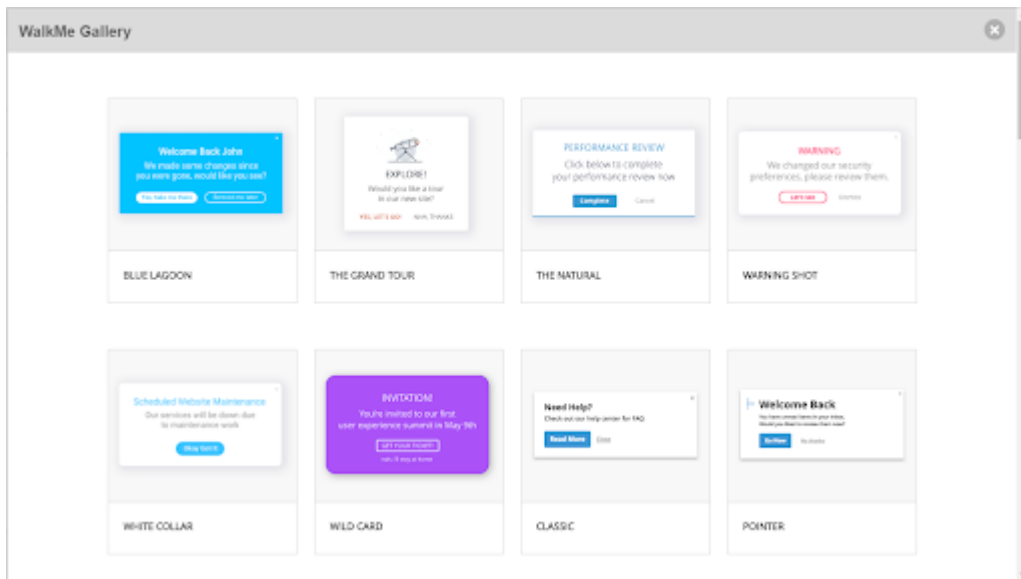


Please contact your WalkMe team, in case SSO is a requirement in your organization.

WalkMe Design

You can easily update the design of your WalkMe balloons and ShoutOuts in minutes. The Design Gallery allows you to select pre-designed templates for your balloons and ShoutOuts.

The templates can also be customized using the Rich Text Editor and saved for future use.



In case none of WalkMe's available design templates fit your UI needs, please let your WalkMe Account Manager know.

More information on WalkMe Design can be found in our [Support article](#).

Integrations

Live Chat Integration

Live Chat Integration allows you to integrate your current Live Chat provider with WalkMe, providing users with a one-stop-shop for help. If an end-user cannot find the information they require, they may click the Live Chat link embedded within the Player for more information.

Our current supported providers are:

- Habla
- Intercom
- LiveAgent
- LiveChat
- Olark
- PureChat
- Snap Engage
- Tawk
- Zendesk
- Zopim

If your current chat provider isn't on our supported provider list, please reach out to your Account Manager. More information on our Live Chat Integration can be found in our [Support article](#).

Search Provider Integration

Search Provider Integration (or simply, Search) allows you to supplement your WalkMe items with your existing knowledge base or support center resources. Once enabled, a search performed within the WalkMe Widget will yield results from the domains specified, showing your existing content besides your WalkMe content.

Our current supported providers are:

- Zendesk
- Desk
- Bing
- Google

If your Knowledgebase can be indexed by an external Search engine, you should be able to set the Integration through the search engine (Google/Bing) by specifying the Knowledgebase domain. For more information, please review our [Support article](#).

If your current Search provider isn't on our supported provider list, please reach out to your Account Manager.

WalkMe APIs

The [WalkMe Developer Hub](#) is our developer interface, offering research-backed APIs from WalkMe's experts which ensures you learn quickly and thoroughly. Using a read-only format, you can view and learn about WalkMe's available API's to expand and improve your WalkMe solution.

Use Cases

- Build extensions, for example, create an integration between WalkMe and third-party app.
- Debug using WalkMe's tried and tested debugging API for smoothly publish your content.
- Analyze WalkMe behaviors and extend its functionality to automate your WalkMe products.



How it works

Use the WalkMe Developer Hub as your API reference to help you build software alongside other developers.

Take collaboration to the next level using the WalkMe Community, to share and discuss different API's.

Should you wish to start using WalkMe public (REST) APIs, please contact your Account Manager.