

Editor – The WalkMe Builder Experience

Brief Overview

The WalkMe Editor is your go-to tool for creating, handling, and sharing Smart Walk-Thrus and other WalkMe content. After you've installed the editor on your computer, download the editor extension to your browser of choice and you're all set to start building.

For more detailed guidance on how to install the editor, please refer to our editor installation article.

[Install the WalkMe Editor](#)

Tip

[View the Introduction to the Editor article before you begin building](#)

□ Digital Adoption Institute

- Take the [Basic Simulation course](#) in the *Orientation* curriculum.
- Take the [Basic Solution Building course](#) in the Digital Adoption Technical Training curriculum.
- Don't have a DAI account yet? [Sign up here](#)

Technical Information

Supported Operating Systems

- Windows 7 and later
- Mac OSX 10.12 and later

Supported Browsers

- Chrome 57 and later
- IE 10 and later (See limitations section below for ETA)

Display Resolution

1280 x 720 pixels up to 2880 x 1800

Limitations

- Recommended text size (DPI) is 100%
 - The Editor does not support operating system text size greater than 100%
- Capture/Navigate toggle doesn't work in a dropdown
- No support for IE doc modes earlier than IE 10
- No capturing for mobile web on Firefox and IE
- No blue highlight around elements when capturing mobile web in Chrome
- It is not possible to record/play/capture on more than one Chrome persona at a time
- In case Browser will be closed before Editor closure, ME will be blocked when the browser will be reopened until Editor will be opened and closed
- ME block will happen when the Editor Extension is being disabled while the Editor is opened

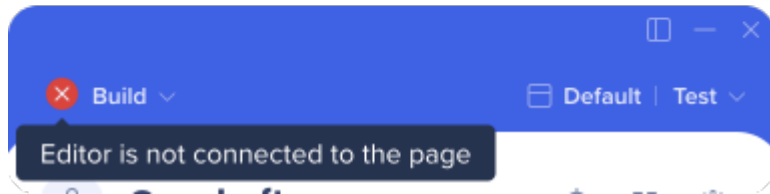
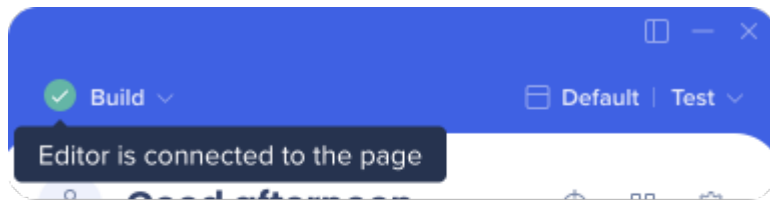
Editor Configuration

Browser Connection

When you are ready to begin building, 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.

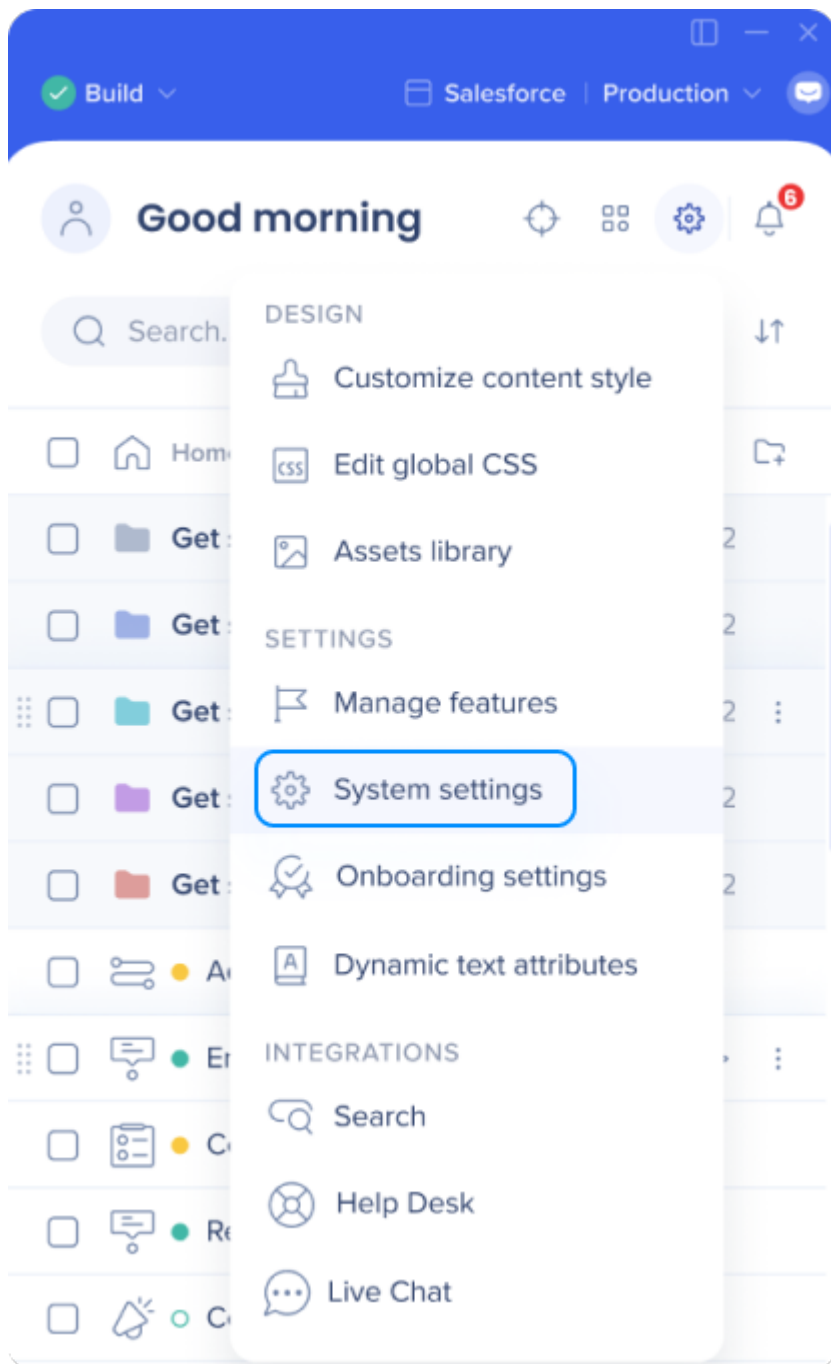
The circle icon in the upper left of the editor indicates if the editor is connected to the browser.

- **Green checkmark:** Editor is connected to the page
- **Red X:** Editor is not connected to the page



If you are not able to connect, it is recommended to double check your settings and restart the editor. If you are still experiencing problems, please reach out to support.

System Settings



Connected Browser

To install the editor extension and begin building:

1. Open the **User Preferences** tab of the editor **System Settings**
2. Select your computer's default browser
3. Click the **Add Browser Extension** button

General
Safe Start
Shield
User Preferences
Snippet

Connected Browser

☒ Chrome
☐ Edge Chromium
☐ Firefox (version 54 and above)
☐ IE (version 11 and above)

Click the button below to add the selected extension

Add Chrome Extension

If installation doesn't start, [click here](#) to copy the installation link, and paste it into your browser's address bar

Editor Layout

Set the relations between the Editor to the browser window you are working with

☒ Side By Side ?
☐ Always On Top ?

Publish settings
Admin Settings
Cancel
Save

[Install the WalkMe Editor](#)

Editor Layout

There are two layout modes available for the editor which can be changed at any time.

- Side By Side (SBS):** The editor and connected browser will align side-by-side
 - This is the default layout and is recommended for working on most websites
 - To align the editor to the connected browser make sure you have the browser open and then turn on SBS mode
- Always on Top:** Positions the editor on top of all other windows



- Recommended for sales presentations and working on websites that require the browser to be full width
- If you find the Editor obstructing your view you can minimize it and then press the WalkMe icon on the taskbar / dock to open it once you are ready

The maximum width of the editor can also be adjusted here.

- **Full Screen:** The maximum width will be the full screen size
- **Max Width:** Enter the desired width size of the editor (must be a minimum of 1500 px)

Editor Layout

Set the relations between the Editor to the browser window you are working with

- ☒ Side By Side 
- ☐ Always On Top 

Set the maximum width of the Editor (requires refreshing the Editor)

- ☐ Full Screen
- ☒ Max Width: px 

Unique User Settings

Before building, consider how you would like to track your users. For example, when you look at analytics in Insights would you like users to be identified by their email address, anonymous ID number, or a unique identifying element on their screen?

There are several supported options for user identifiers:

- **None:** Does not track unique users (onboarding tasks will not cross off and Auto Play cannot be used)
- **WalkMe ID:** A unique ID generated by WalkMe, functions similar to a cookie based UUID
- **Cookie:** A cookie stored on the user's browser
- **jQuery:** An HTML element using a jQuery selector
- **Variable:** A javascript window variable on your site
- **Salesforce User ID:** A user ID from Salesforce

- **IDP:** A supported identity provider

Note

- IDP is the recommended user identifier
- Learn more: [IDP Integration](#)

General
Safe Start
Shield
User Preferences
Snippet

Unique User Settings

Set a unique user identifier to track each user's activity

User Identifier: Defined by

None
WalkMe ID
Cookie
jQuery
Variable
Salesforce User ID
IDP

IDP Identifier settings are not available when IDP is configured via the [IDP Integration](#) page. Click [here](#) to configure them.

When IDP is configured via the [IDP Integration](#) page, the IDP identifier will be used as a fallback method if IDP authentication fails.

Expected format: ?

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

[Unique User Settings \(UUID\)](#)

Analytics Properties

You can link an existing variable, jQuery selector, or website cookie to an analytics property in the Editor to gain deeper insights about your users. This valuable information can then be used to set up new saved filters.

General
Safe Start
Features
Connectors
Shield
User Preferences
Snippet

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

Name:
Defined by
Variable
object.userId

Salesforce Variable

Add a Variable here...
Add

Dynamic text attributes

[Manage Attributes](#)

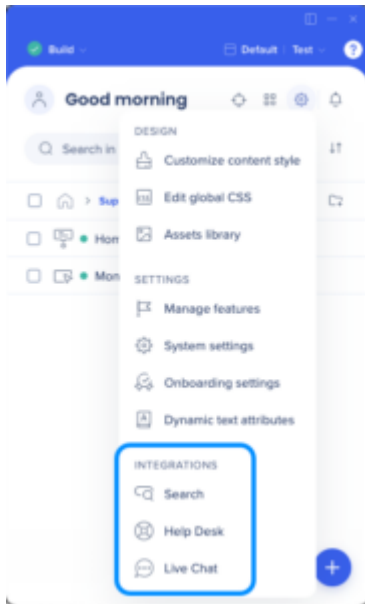
WalkMe Flow Tracker Settings

Activated in Play Mode
Activated in Preview Mode

Publish settings
Admin Settings
Cancel
Save

[Using Analytics Properties](#)

Integrations



Search Integration

Search integration allows you to supplement your WalkMe content with existing knowledge base or support center resources. Once enabled, users who search your WalkMe Menu will see not just the WalkMe content you have built, but also results from the domains specified.

Our current supported providers are:

- Zendesk
- Desk
- Bing
- Google

[Search Provider Integration](#)

Help Desk Integration

The help desk integration offers a seamless connection to your support site directly from the WalkMe Menu. By incorporating a link to your support site within the menu, users are able to access your help desk swiftly with just one click.

[Help Desk Integration](#)

Live Chat Integration

Live chat integrations allows you to connect your chat provider in the WalkMe Menu, providing users with quick access for help if they cannot find the information they are looking for.

[Live Chat Integration](#)

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.

[Segmentation](#)

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.

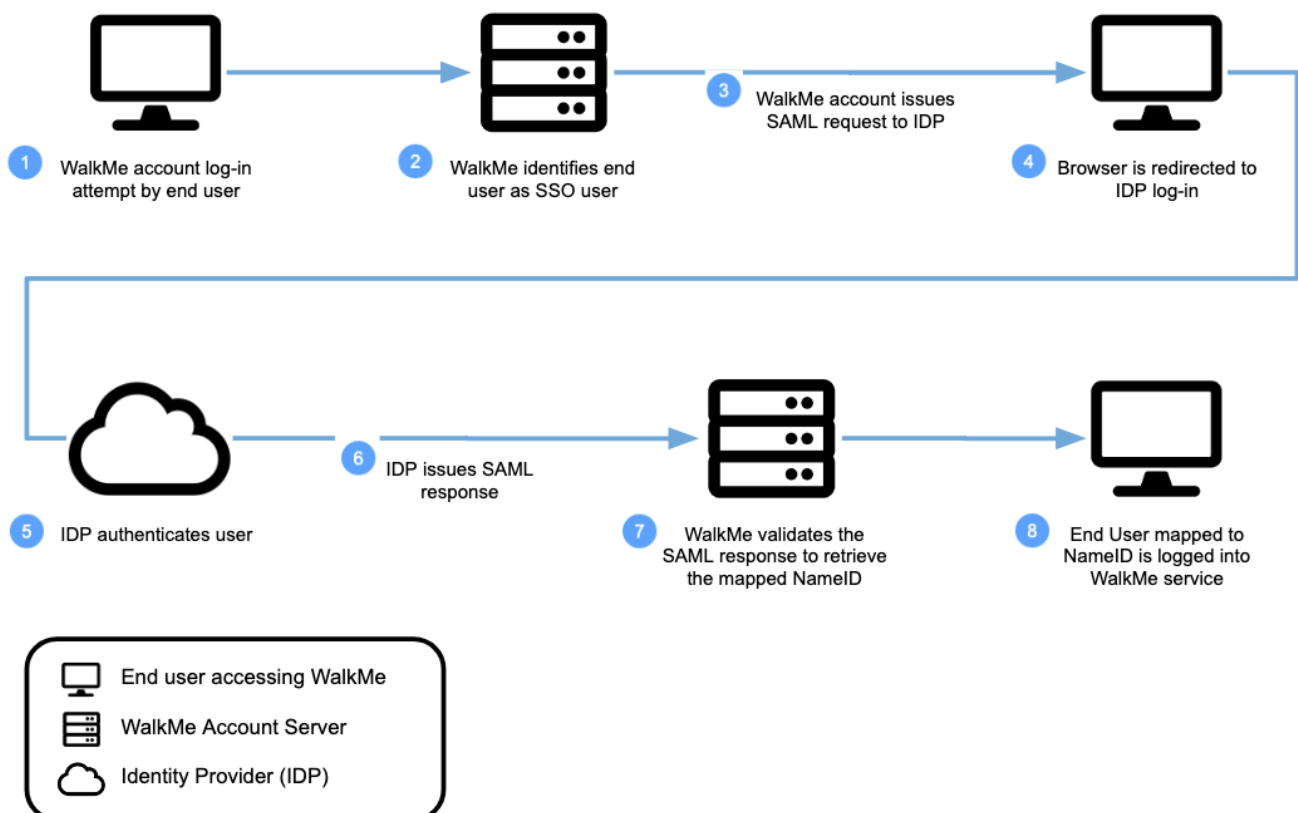
[Accessibility Settings](#)

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.

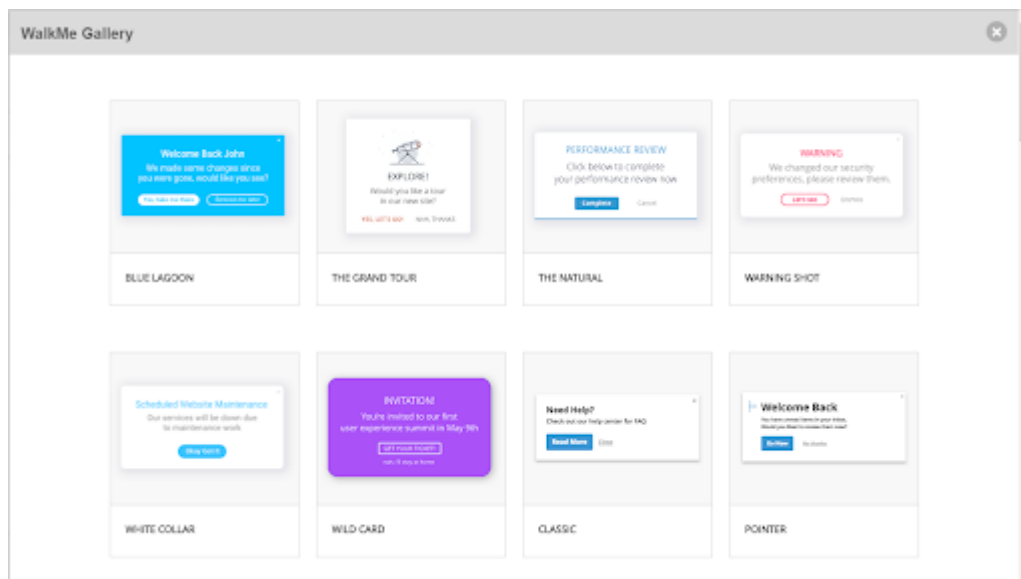


Please contact your WalkMe team, in case SSO is a requirement in your organization.

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.

[Design Gallery](#)

WalkMe APIs

The WalkMe Developer Hub is our developer interface, offering research-backed APIs from WalkMe's experts. Using a read-only format, you can view and learn about WalkMe's available APIs to expand and improve your WalkMe solution.

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

[WalkMe Developer Hub](#)