

Search Provider Integration

Brief Overview

Supplement your WalkMe items with your existing knowledge base or support center resources with WalkMe's search integration.

WalkMe's search integration is available with the following applications: Google, Bing, ZenDesk, and Desk.

Search Provider Integration allows you to supplement your WalkMe items with your existing knowledge base or support center resources. Once enabled, a search performed within the widget will yield results from the domains specified, so your existing content appears beside your WalkMe content in the Player Menu.

As part of your WalkMe implementation, if you have an existing repository of support articles, you have the ability to enable Search Provider Integration. Without SPI, when the user performs a search in the Player Menu, they only see results of the WalkMe items you deployed, such as Walk-Thrus and Resources. Enabling SPI allows searches performed within the Player to pull results that match the search criteria from the domain specified, making the Player Menu a richer, all-in-one resource for your users.

Note:

Using search engines directly within the browser could yield different search results than the equivalent search provider in WalkMe's menu. This is due to the fact that some search engines optimize the search based on parameters such as geo-location, search history, etc.

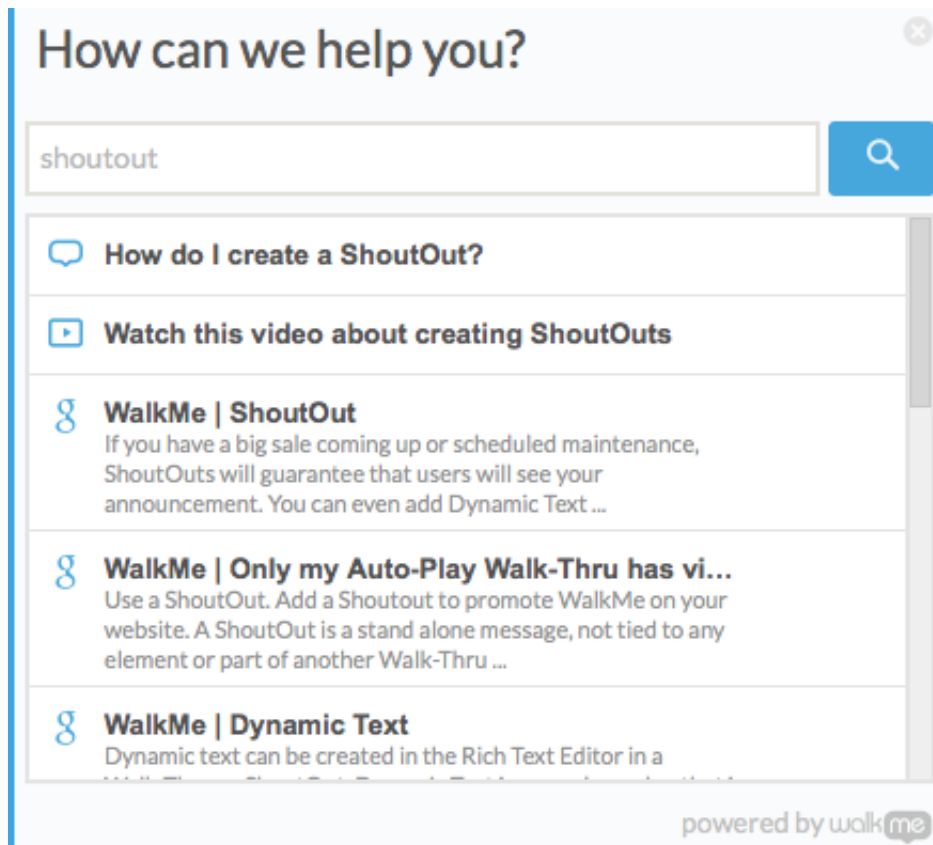
Use Cases

Search Integration can be used with any publicly accessible domain that is indexed by the search provider. Search Integration is commonly used to:

- Integrate search results from your support center in the Player Menu.
- Identify potentially helpful knowledgebase articles alongside other relevant

Resources and Walk-Thrus.

- Return videos with corresponding keywords from an external video hosting site.

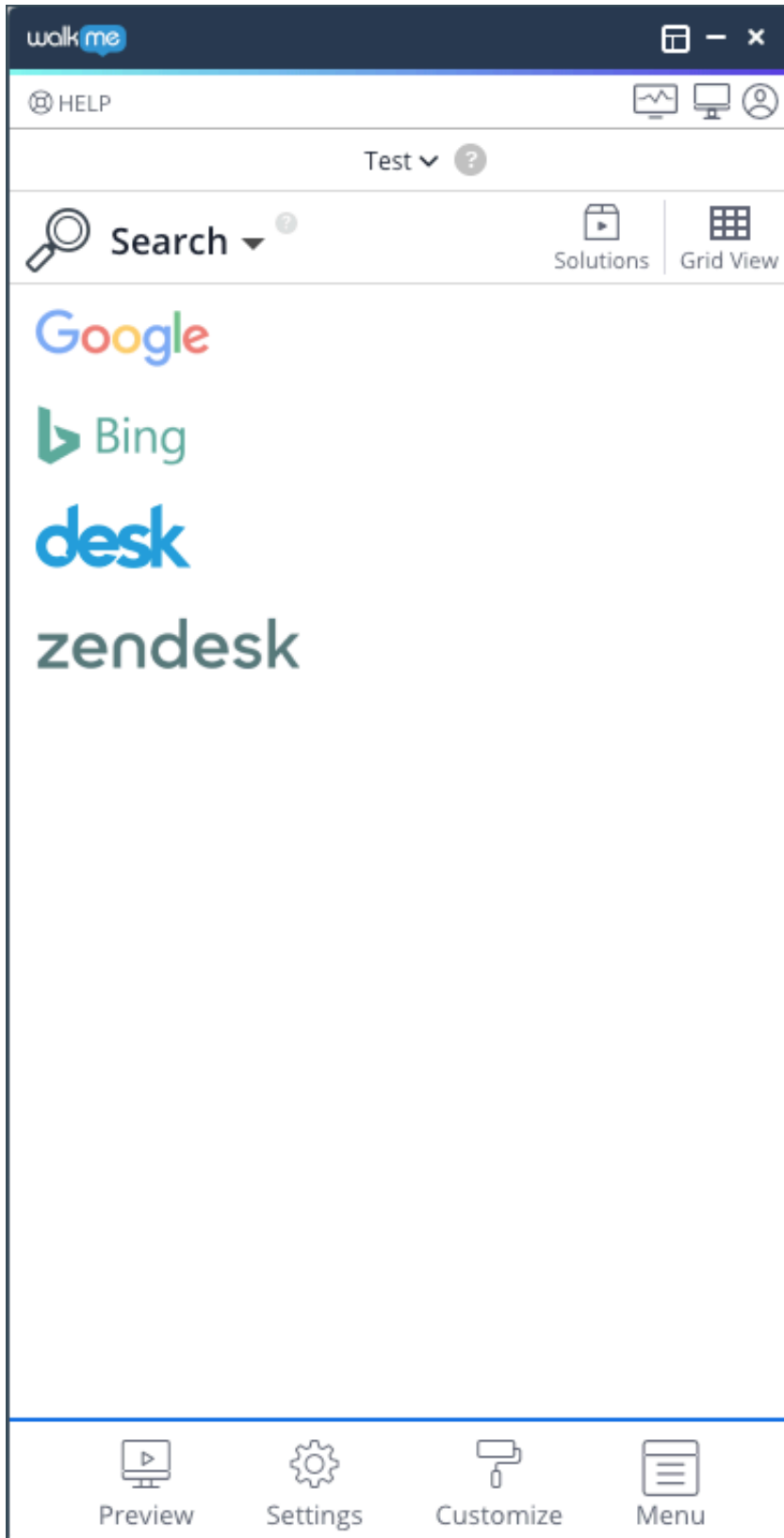


For example, here at WalkMe, we enabled SPI to show results from our knowledge base support.walkme.com. In the image above, there are two published WalkMe items about ShoutOuts: a Resource and a Walk-Thru. These both appear in the Player Menu when “shoutout” is searched. Because SPI is enabled, the Player Menu is also displaying results from support.walkme.com, providing a greater variety of information to the user on the subject of ShoutOuts.

How It Works

Search integration means that in the WalkMe widget users can search not only the deployed WalkMe items but also see results from the search engine of your choice. Once Search Provider Integration is enabled, when a user performs a search, the Player Menu will route the keyword to the specified search engine. The search engine will reply back with the relevant content and the Player Menu will display those results. The keyword searches will be tracked in Insights.

Search Provider Options



Enable search integration through one of the following search engine providers:

- Google

- Bing
- Desk
- Zendesk
- Salesforce Lightning
- Salesforce Communities


Please Note:


Salesforce Knowledge, Classic and Lightning search integrations are not available for all WalkMe account types. Please reach out to your WalkMe Account Manager to learn more.

Refine Search Results

To refine search results, choose Domains in which to search, i.e. mysite.com or support.mysite.com.

domains

 <http://walkme.com>

 <http://amazon.com>

Identifying a domain will limit the search to within a particular website. Without an identified domain, the search engine will return results from across the web. In the example above, only results within the domains walkme.com and amazon.com will be displayed. Note that in the Player Menu, results from the first domain entered will display first; i.e. search results from amazon.com will display lower in the search result list than results from walkme.com.

Add a Search Operator to refine the type of results that will appear.

Search Operators (optional)



In the above image, searches will only return results without videos (the character "-" will exclude sites with that info from the search).

Track Searches Performed In Insights

When Search Integration is enabled, you will be able to track all keywords searched in Insights. This data can help you understand what topics your users need more help with and where you might need to add more support or training resources.

In Insights, you can view:

- The number of searches for a given keyword.
- How many searches resulted in a search engine result being clicked.
- How many searches resulted in a WalkMe item (Walk-Thru, Shuttle, or Resource) being clicked.
- How many searches resulted in no action being taken.

Can I enable Search Provider Integration?

To integrate search with a specific domain, it must be publicly accessible and indexed by the selected search provider. Check to see if your desired site can be configured with search integration. To test it, try an advanced search within Google or Bing. For example: to search for the word "ShoutOut" in "www.walkme.com" type in the search provider: "ShoutOut site:www.walkme.com". If you get results, then SPI can work on that site using Google or Bing. If articles are in any way hidden, such as with an intranet, WalkMe will not be able to populate those articles within the search results.

Can we use SPI if the domain is password protected?

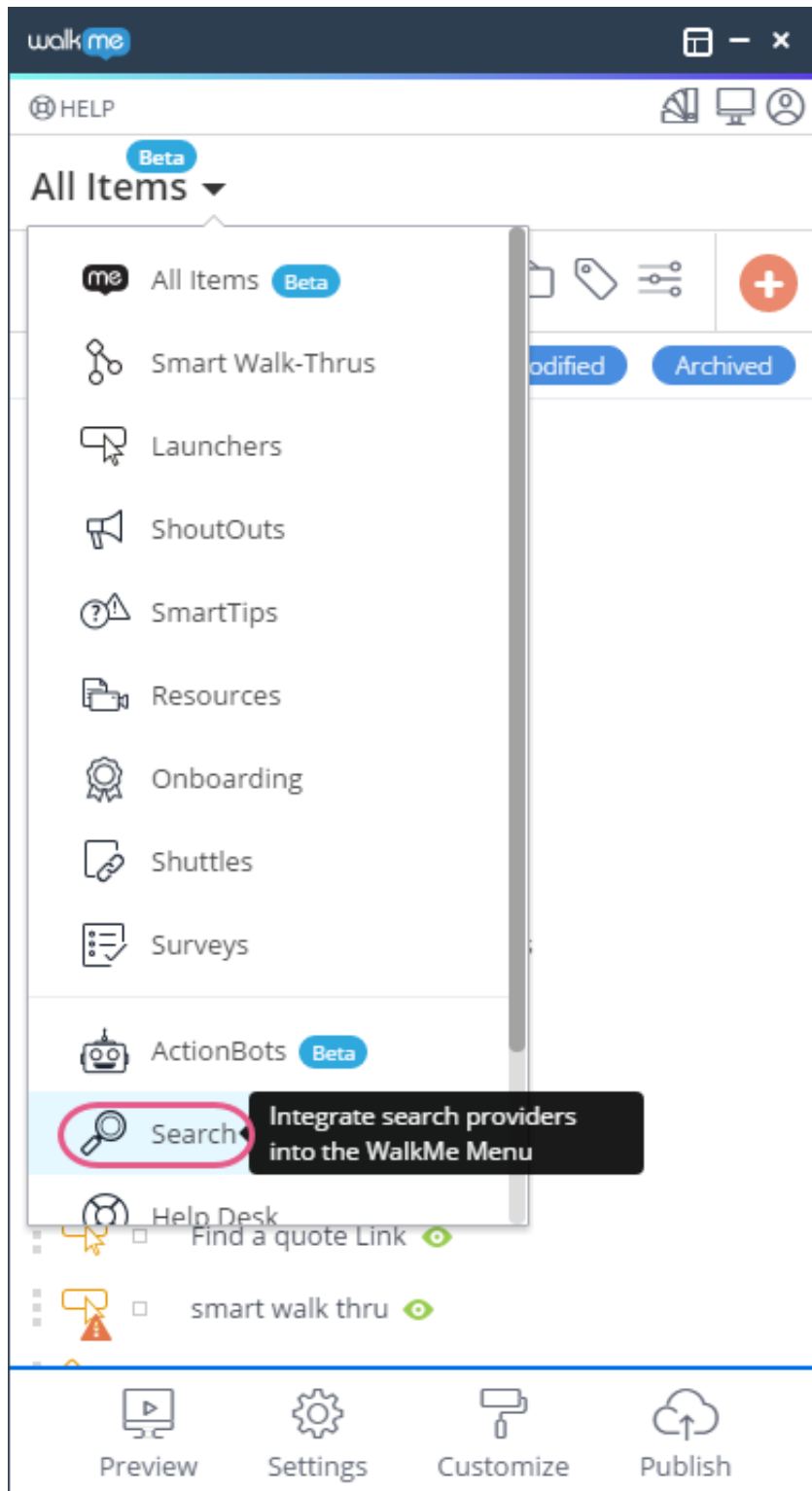
You may not get search results if the domain you try to pull searches from is password protected. Contact your Account Manager to determine if search integration can be configured.

What if the knowledge base host has an API? Can we use that to integrate?

If the knowledge base has an API, then it may be possible to use that API instead of our regular search feature. Contact your Account Manager to determine if search integration can be configured.

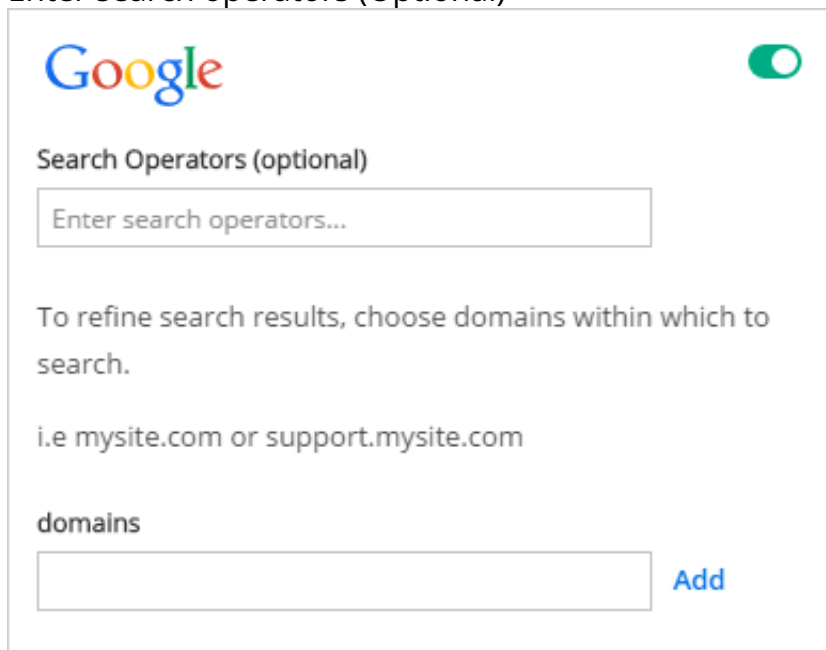
Enabling Search Integration

- Go to the App Center and select Search



- Select your desired Search Provider
- Turn the toggle to On.
- Where applicable, enter the domain from which you would like to include search results.

- Enter search operators (Optional)



The screenshot shows a configuration window for Google Search Operators. At the top left is the Google logo, and at the top right is a green toggle switch. Below the logo is the text "Search Operators (optional)". Underneath is a text input field with the placeholder text "Enter search operators...". Below the input field is the instruction "To refine search results, choose domains within which to search." followed by the example "i.e mysite.com or support.mysite.com". At the bottom, there is a section labeled "domains" with a text input field and a blue "Add" button to its right.

- Click Save

Salesforce Search Integration

To enable search in Salesforce Lightning, your WalkMe salesforce connectors must be enabled, contact your Account Manager for help.