

Search Provider Integration

Brief Overview

The WalkMe Search Integration allows you to leverage your existing knowledge base or support center resources to enhance your WalkMe content. Without search integration enabled, when the user performs a search in the WalkMe Menu, they only see results of the WalkMe items added, such as Smart Walk-Thrus and Resources.

Enabling the search integration allows searches performed within the menu to pull results that match the search criteria from the domain specified, beside your existing WalkMe content, making the menu a richer, all-in-one resource for your users.

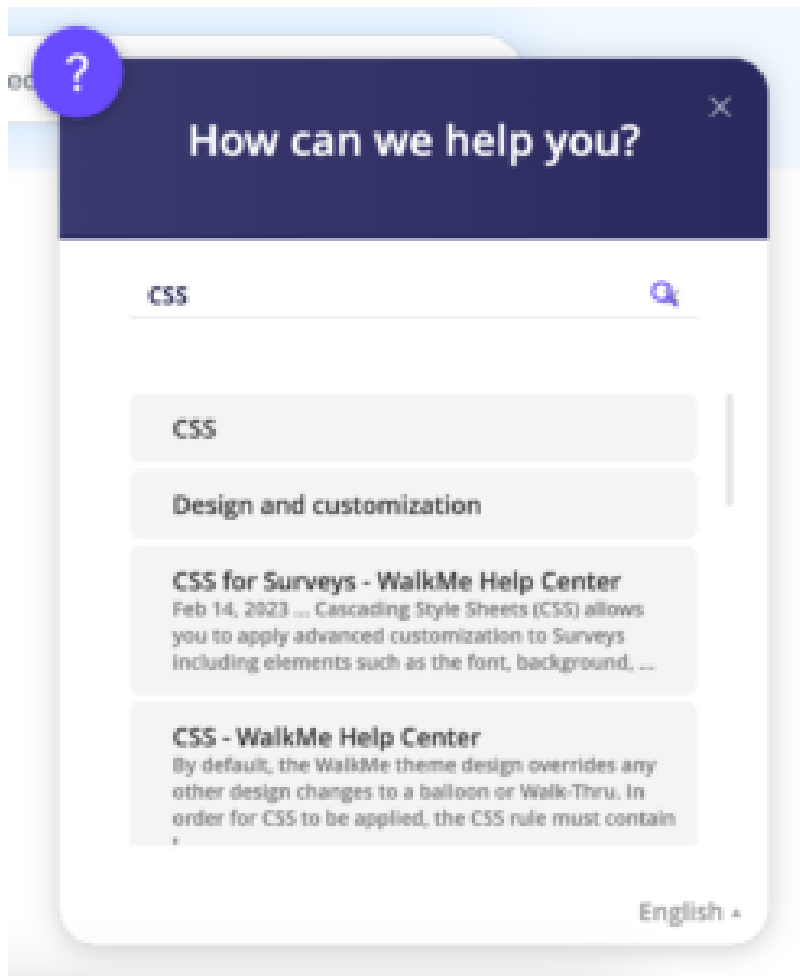
WalkMe's search integration is available with the following applications: **Google, Bing, ZenDesk,** and **Desk.**

Use Cases

Search integration can be used with any publicly accessible domain that is indexed by the search provider.

The WalkMe Search Integration is commonly used to:

- Integrate search results from your support center in the WalkMe Menu
- Identify helpful knowledge base articles alongside other relevant resources and Smart Walk-Thrus
- Return videos with corresponding keywords from an external video hosting site



WalkMe Menu with Search Integration

For example, on this site we enabled our menu to show results from support.walkme.com, in addition to the WalkMe Resources we added.

How It Works

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

Note

Using search engines directly within the browser can yield different search results than the equivalent search provider in the WalkMe Menu. This is because some search engines optimize

search results based on parameters such as geo-location and search history.

Search Provider Options

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

1. Google
2. Bing
3. Desk
4. Zendesk

Salesforce Search Integration

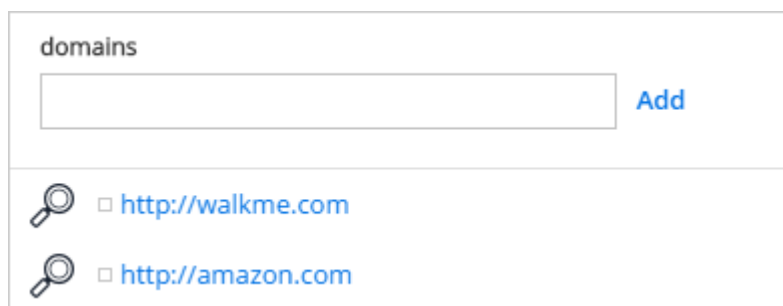
To enable search in Salesforce Lightning, your WalkMe salesforce connectors must be enabled. Salesforce Knowledge, Classic, and Lightning search integrations are not available for all WalkMe account types. Please reach out to your Customer Success Manager or WalkMe contact to learn more.

Refine Search Results

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.

To refine search results, enter the domains from where to search and click **Add**.

For example, mysite.com or support.mysite.com.



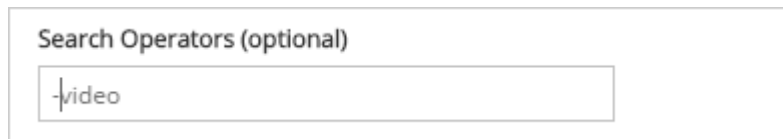
The screenshot shows a user interface for adding search domains. At the top, there is a label "domains" above a text input field. To the right of the input field is a blue "Add" button. Below the input field, there is a list of domains, each preceded by a magnifying glass icon and a checkbox. The first domain is "http://walkme.com" and the second is "http://amazon.com".

In this example, only results within the domains walkme.com and amazon.com will be displayed

Tip

Results from the first domain entered will always display first in the WalkMe Menu.

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



The image shows a rectangular box with a light gray border. Inside the box, at the top left, is the text "Search Operators (optional)" in a small, dark gray font. Below this text is a white input field with a thin gray border. Inside the input field, the text "-video" is entered in a dark gray font.

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, such as a Smart Walk-Thru, Shuttle, or Resource, being clicked
- How many searches resulted in no action being taken

Can I enable Search 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 the search integration 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?

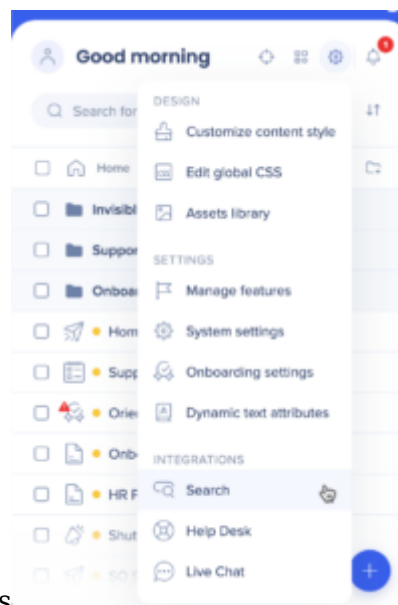
You may not get search results if the domain you try to pull searches from is password protected.

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.

Enabling Search Integration



1. Select **Search** under Integrations in the Editor settings.
2. Choose your desired search provider
3. Turn the toggle **On**
4. Enter the domain where you would like to include search results and any search operators


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Search Operators (optional)

To refine search results, choose domains within which to search.

i.e mysite.com or support.mysite.com

domains

5. Click **Save**