Sharepoint Best Practices

Use WalkMe on Sharepoint to help users learn their core job functions, access company information, or collaborate with others. Building WalkMe on Sharepoint is generally straightforward but there are a few best practices to keep in mind. After building, make sure to perform thorough Quality Assurance Testing before publishing to end users.

The Short Version

Sharepoint is a common platform used for corporate intranet and information management. Because Sharepoint often is used to host a lot of information, users may find that they don't know where to go to find the specific information they need. With WalkMe on Sharepoint, you'll be able to help your users find information, collaborate with others, and perform job tasks in Sharepoint more efficiently.

When using WalkMe with Sharepoint, there are some commonly used features and best practices to keep in mind.

How It Works

Although no two configurations are the same, Sharepoint often functions much like any other website. Because of some of the unique characteristics of Sharepoint, we recommend considering the following when building WalkMe and performing Quality Assurance Testing before publishing. WalkMe is not compatible with Sharepoint 2007.

Sharepoint is a responsive site, meaning that as you adjust the browser window or use a different screen size, the page reformats itself to fit the page better. For example, some implementations of Sharepoint have a ribbon of tools along the top of the page that can change based on screen size.

Your Sharepoint may contain IFrames, which allows for another website or page to be embedded within the current page. For example, if you have a spreadsheet or form embedded on the page. If you're interested in learning more about working with IFrames in WalkMe, take a look at our knowledge base article.

Sharepoint Best Practices

Start From Home

When building in Sharepoint, consider starting all your walk-thrus from the main homepage. This will allow your Walk-Thrus to generally run from anywhere if you always include a step to visit Home.

Building On Responsive Pages

When capturing elements that change position on the site depending on screen size, instead of capturing that specific element, consider alternate options such as:

- **Use a Refresh Trigger:** This will tell WalkMe to advance to the next step when the page refreshes due to the user selecting an element.
- **Use Add More Triggers:** This will allow you to select any elements on the page that the user is likely to interact with, which will allow the Walk-Thru to advance.
- Point to an element that remains constant on the page such as in the main menu

Building For Hover Menus

If your main menu uses a lot of hover elements, using Sticky in the Behavior menu of your step will enable the step to reappear even if the user moves their mouse off of the hover element.

Z-Index

Sharepoint is made up of many iframes that load as a new window/layer one on top of the other as per the image below. In order for WalkMe content (balloons, Launchers, etc.) to be visible, set the z-index to be higher than the window. In the example below, you'll see one iframe that loads as a new window with a z-index of 1,504. Setting the balloons/Launchers you want to appear on this window as 1,505 will ensure their visibility.

Related Resources

- [IFrames article](#)
- [QA Testing](#)