Auto-Steps: Getting Started Guide

Brief Overview

Why make your users complete repetitive tasks when you can simply automate them? With Auto-Steps, you can easily automate numerous tasks for your users, saving them time, and improving their user experience. This way, your employees and end-users can focus on what really matters, instead of where to navigate to get to a feature.

With Auto-Steps, automating multiple steps or an entire process is fast and easy to do. You simply capture the steps as you go. Best of all, there's no coding, API, or backend integration required!

You can add Auto-Steps anywhere in a Smart Walk-Thru (see how in the Steps To Add Auto-Steps section below. Auto-Steps complete actions on behalf of the user, like clicking on a link or button, typing into a field, or hovering over a menu. You can even quickly toggle between regular Steps and Auto-Steps as you record a process.

A Smart Walk-Thru that is made up entirely of Auto-Steps can be played as an Automation Process, which allows it to run simultaneously with visual Smart Walk-Thrus.

 Tip: WalkMe Compass Guide

WalkMe Compass offers in-app, step-by-step guidance to help you on this subject. Click on the link below to be redirected to the WalkMe Editor. You must be logged in to your editor in order for the guidance to launch.

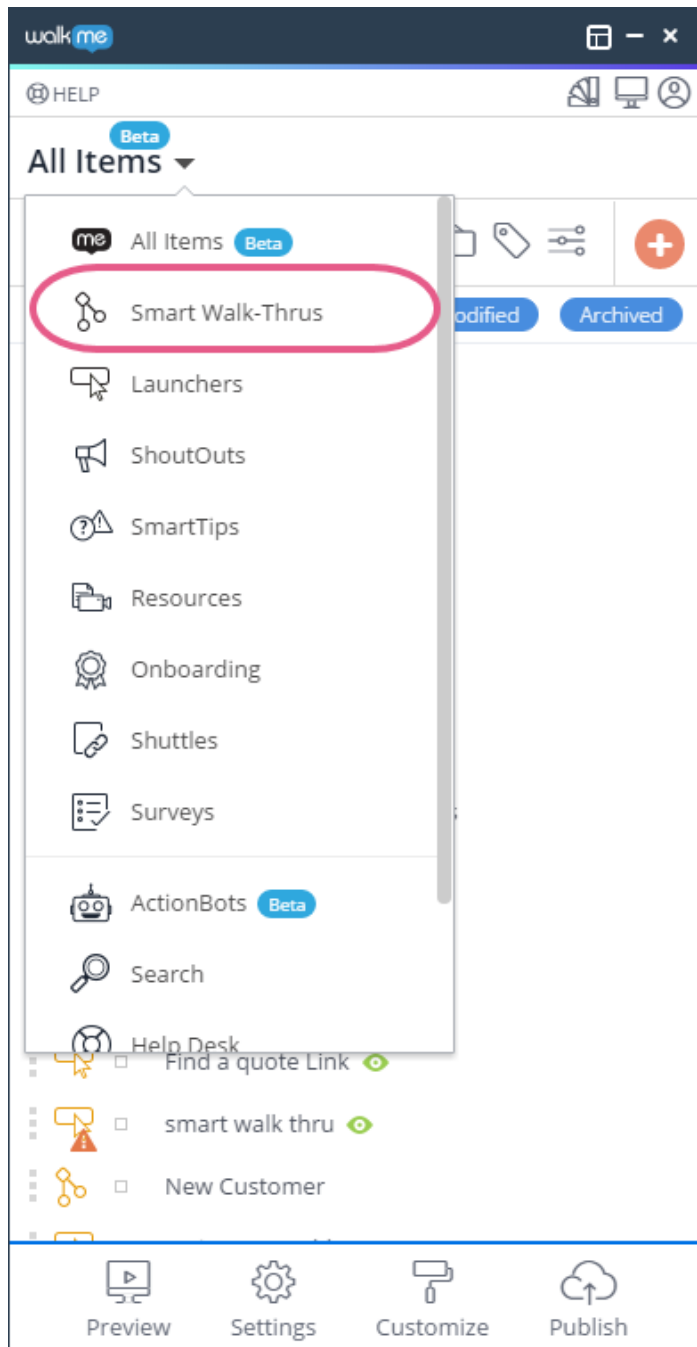 View the Auto-Steps Getting Started Guide

Use Cases

Action-Step use cases include the following:

- Automatically perform the following element-oriented tasks on behalf of your users:
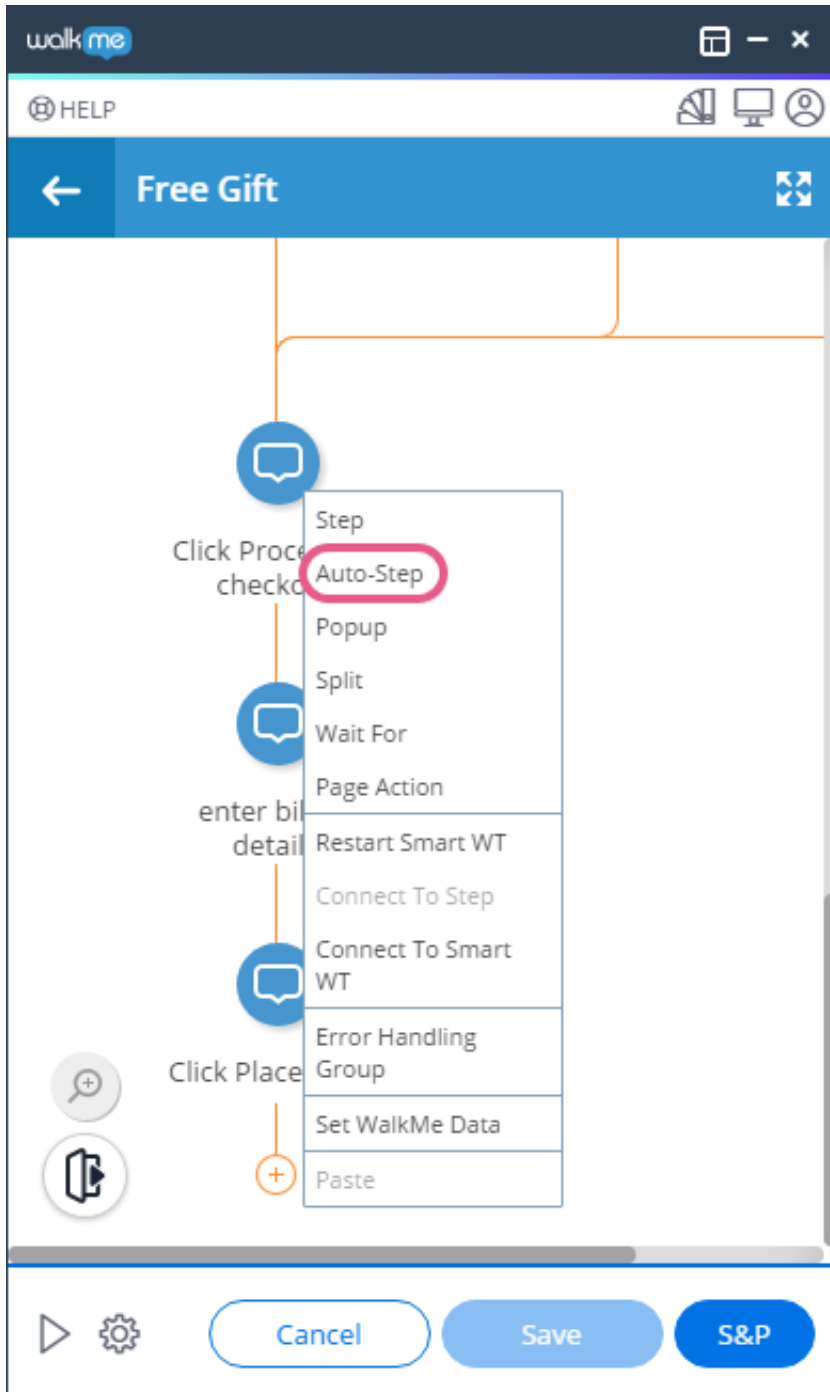   - Click an element;
    - Hover over an element;

- Focus on an element;
- Fill Text into an element;
  - Pro-Tip: Supported HTML input type attributes include numerical/text values (i.e., will be supported by Fill Text Auto Step whereas will not).
- Select a list value from a dropdown menu.
- Quickly capture multiple Auto-Steps;
- Eliminate routine navigation steps with a Smart Walk-Thru;
- Completely automate an end-to-end repetitive process.
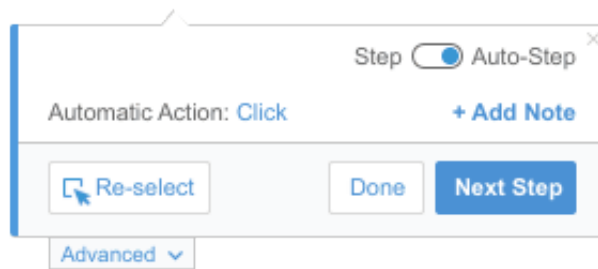
How To Add Auto-Steps

- Sign into your WalkMe Editor account;
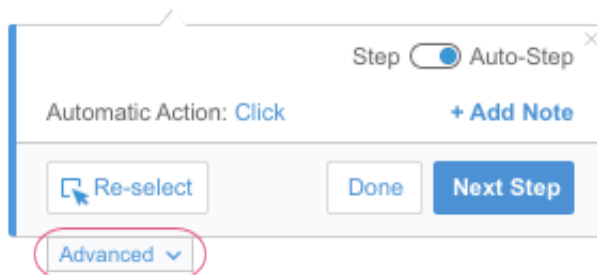- Click the WalkMe apps dropdown triangle and select the Smart Walk-Thrus app:

○ Either hover over the edit (pencil) icon on one of your pre-existing Smart Walk-Thrus and click Edit, or click the "+" icon in the upper right to begin creating a new Smart Walk-Thru;

○ Hover over a "+" icon in the Smart Walk-Thru's path and click Auto-Step to enter Auto-Step capture mode:
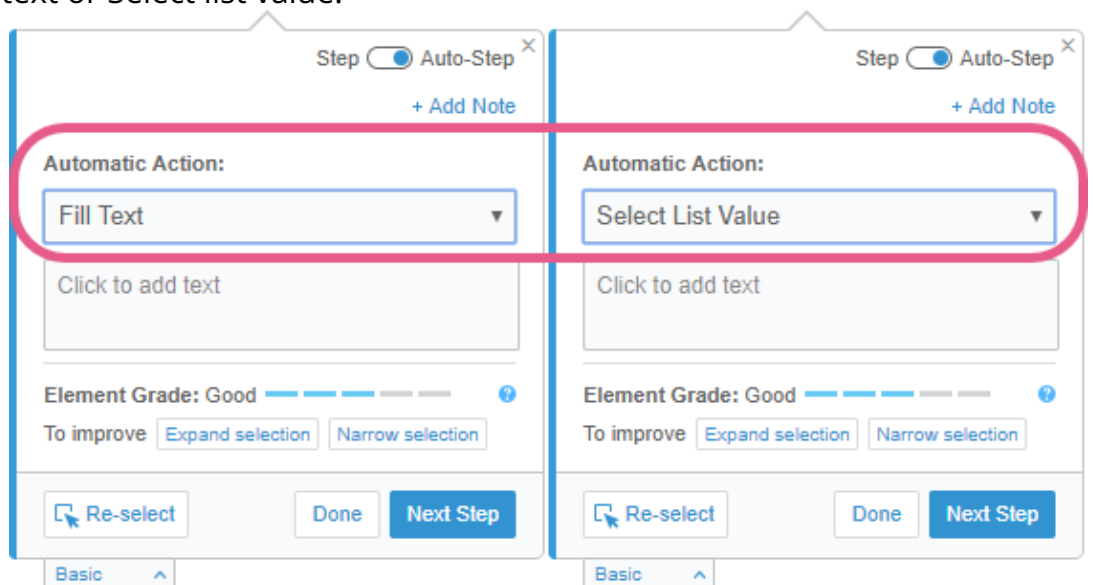
- You will now enter Auto-Step Capture Mode.
- Capture an element with the element inspector;
    - A capture box will appear with a pre-set action setting per the element-type you captured (e.g., for a clickable element, the Automatic Action will be set to Click by default):

○ If you wish to change the step's Automatic Action setting, click the Advanced tab:

○ You can select such action-types as were mentioned above, e.g., Fill text or Select list value:
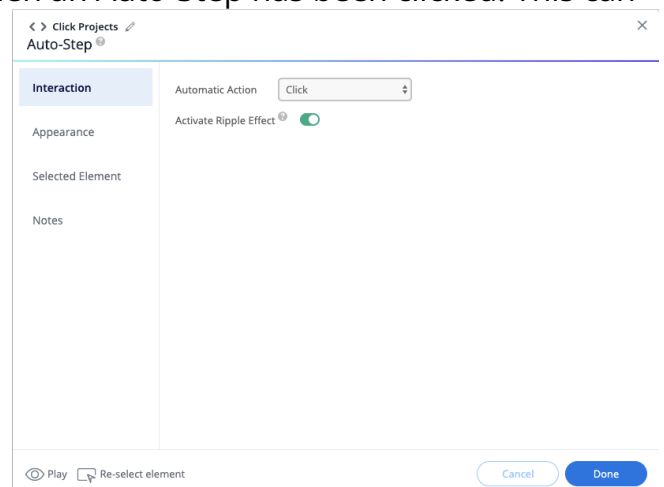

NOTE:

The 'Automatic Action' shows only available options depending on the element you have selected, e.g. A button will not have the option of 'Fill Text'. Use the Re-select option, to re-capture an element.

○ When finished with the step, click Next Step to return to Auto-Step capture mode;

○ When you've captured all the Auto-Steps you want, simply click SAVE per usual.

○ Auto-Steps appear as part of your normal Smart Walk-Thru interface, but with the orange autoplay icon.

Click OK

All orange steps are invisible to your users.

○ By default, a ripple effect will show when an Auto-Step has been clicked. This can

How to Convert Existing Steps To Auto-Steps and Vice Versa

To learn how to convert current steps, read our Convert Smart Walk-Thru Steps to Auto-Steps article.

be disabled in the Interaction settings.