



WalkMe Advanced Search

Brief Overview

WalkMe's built-in Advanced Search feature allows users to search beyond just folder and Deployable items name; users can now search for Deployable item(s) Captured Elements data, jQuery selection data, Condition data, Goal data, Tag data, and Segmentation data within their WalkMe implementation.

How it Works

WalkMe's Advanced Search feature allows users to quickly locate, update, and maintain Element Selections within a WalkMe implementation by Id, class, text, URL, and more.

In addition, Advanced Search enables users to replace one or more searched item's string value or type across the entire implementation.

An item Element can be searched and replaced by Id, Class, Element Text, Host name, Path URL, jQuery selector, content, or on-screen element (via Capture Element mode.)

Activation

To activate Advanced Search within your Editor account:

First, click the arrow icon within the "Search for items" input to launch the Advanced Search modal.

walkme

HELP

Open Chrome Browser to start building WalkMe content.

Production

All Items

Solutions

Search for items

Draft Published Published & Modified Archived

- Compensation (3)
- Benefits Content (12)
- Actionbot Content (6)
- Performance Management Content (8)
- To be deleted or updated (2)
- Manager Self Service (3)
- Time Tracking Content (0)
- Absence and Leave Management Content (14)
- Employee Self Service Content (7)
- Reporting Content (14)
- Payroll (11)
- Workday Navigation Content (10)
- Talent Acquisition/Recruiting Content (10)
- Talent Management Content (16)
- Unsorted (11)

- OE -- Add Beneficiaries
- OE - Add Dependent/Beneficiary Page
- OE - Health Savings Election
- OE - Insurance Elections
- OE - Additional Benefits

Preview Settings Customize Menu

Please Note:

If the WalkMe implementation contains a large amount of deployable/element selection data, the first time Advanced Search is opened, it may take up to 10 seconds to display; this is due to the Editor database caching and passing data to Advanced Search's client for the first time.

How to use "Field" Search

With the Advanced Search modal open:

First, click the Context Description Property dropdown (defaulted to "Content").

- Select a single Context Description Property from the dropdown list:
 - Content
 - Find text content within a Deployable item
 - Element
 - Find captured Element

Advanced Search
✕

Find:

Content ▼

Text ▼

Contains ▼

Search

0 instances found

Content
Element

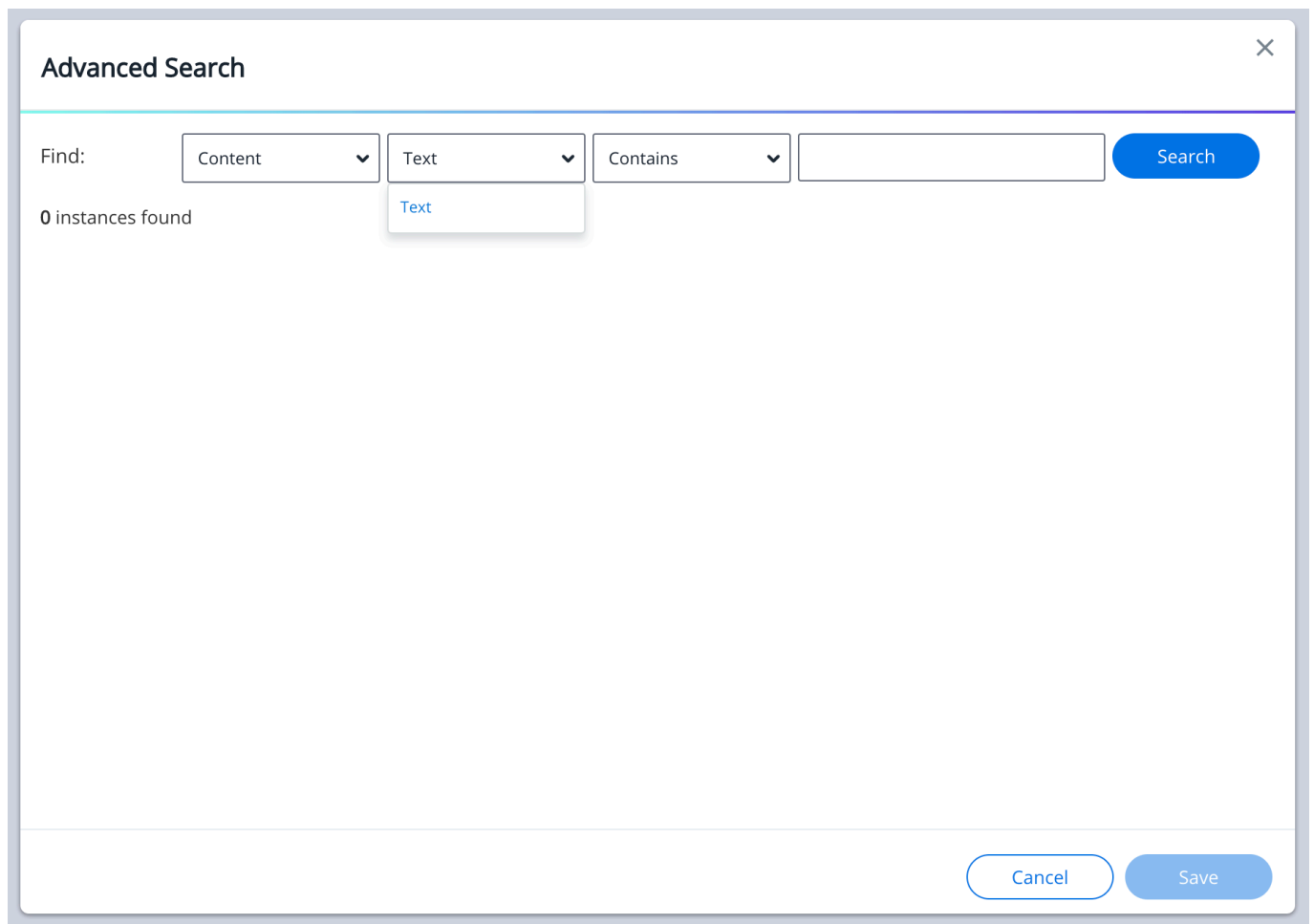
Cancel

Save

Next, click the Element Description Property dropdown.

- Select a single Element Description Property from the dropdown list.
 - Element Description Property types include:
 - Text (Available when the Context Description Property is set to "Content")
 - Search text content within a Deployable item
 - Id (Available when the Context Description Property is set to "Element")
 - Search for elements by their unique HTML Id attribute
 - Class (Available when the Context Description Property is set to "Element")
 - Search for elements by their HTML class attribute
 - Element Text (Available when the Context Description Property is set to "Element")
 - Search for elements by visually readable on-screen element text
 - Host Name (Available when the Context Description Property is set to "Element")
 - Search for elements by their domain (only) URL
 - A domain name is a unique name for a web

- site, like "walkme.com."
- Path URL (Available when the Context Description Property is set to "Element")
 - Search for elements by URL path (or stem)
 - The path (or stem) in the URL is analogous to the file path for a file on a computer, server, or on-demand cloud computing platform, such as Amazon AWS. Not to be confused with the URL host name.
 - Search for elements jQuery selector (Available when the Context Description Property is set to "Element")
 - Often located within a Deployable item's "Selected Element" tab properties.
 - Element on Screen (Available when the Context Description Property is set to "Element")
 - Search for elements by selecting the element via on-screen element selection mode



The screenshot shows the "Advanced Search" dialog box. At the top left is the title "Advanced Search" and a close button (X) at the top right. Below the title bar is a search configuration area. It starts with the label "Find:" followed by three dropdown menus: "Content", "Text", and "Contains". To the right of these is an empty text input field and a blue "Search" button. Below the search configuration, it says "0 instances found". A dropdown menu for "Text" is open, showing "Text" as the selected option. At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Advanced Search
✕

Find:

Element ▼

Id ▼

Contains ▼

Search

0 instances found

Id
 Class
 Element Text
 Domain name
 Path Url
 jQuery Selector

Cancel

Save

Next, click the Condition Operator dropdown (defaulted to “Contains”)

- The “Contains” Condition Operator queries string values with similar matching string paths that have similar characters within the database. The “Is” Condition Operator queries string values with string paths whose characters have an exact match within the database.

Example:

If I am looking for a string value, I can type “Onb” into the search bar and my string value “Onboarding level1” will appear as a result, but only if “Contains” is active. However, I must type the entire, correct string value of “Onboarding level1” into the search bar for it to appear as a result when the Condition Operator is set to “Is”.

Now, enter the desired string value (Id, Class, Element Text, Host Name, or Path URL) into

the search bar input box.

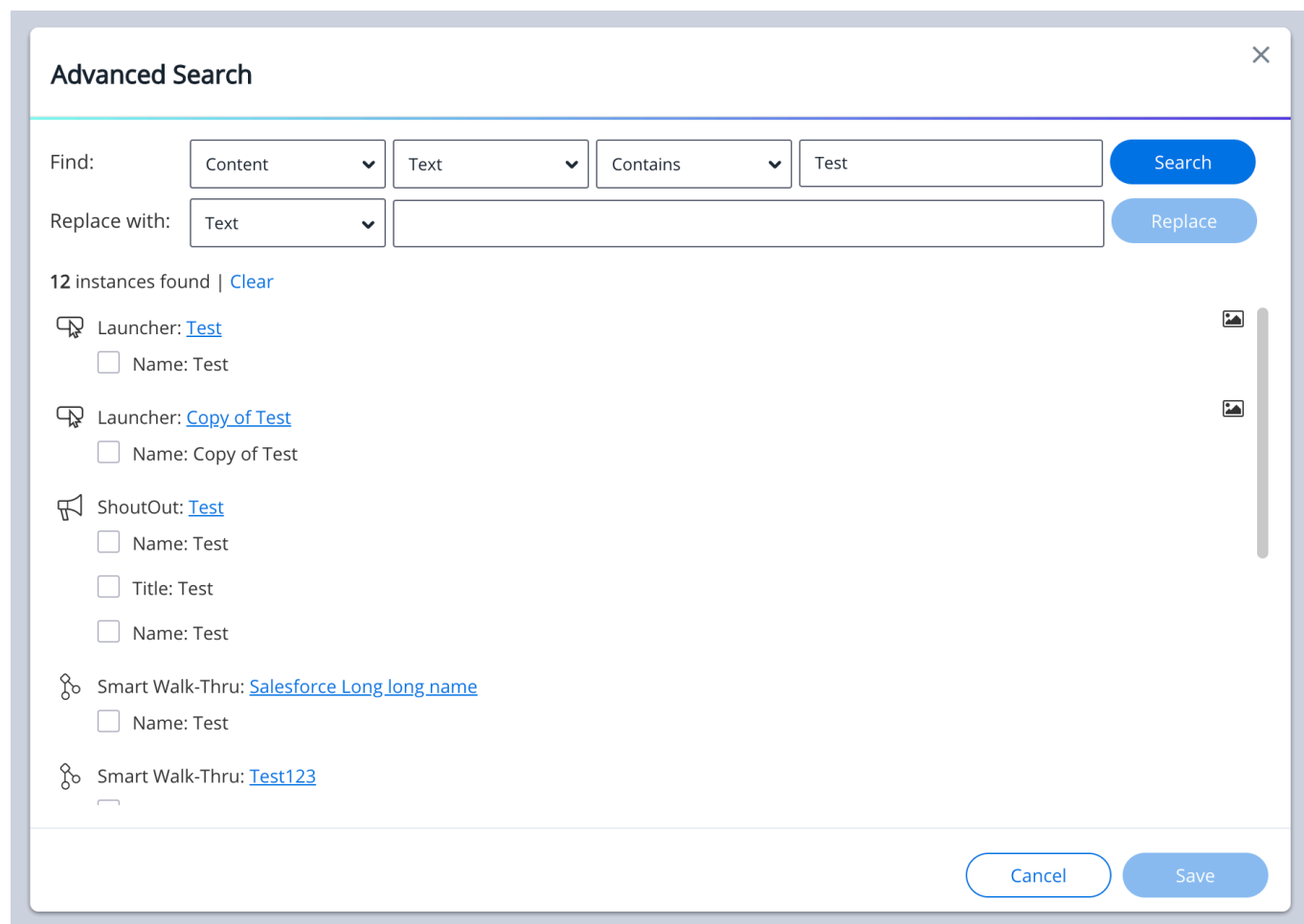
Click "Search."

How it works:

Advanced Search will query the entire Editor account's data (within the WalkMe database) and provide matching results defined by the user's Context Operator selection + Element Description Property selection + Condition Operator selection + the user's string value.

Once the Advanced Search query is complete, the Advanced Search modal will display the number of search result instances found.

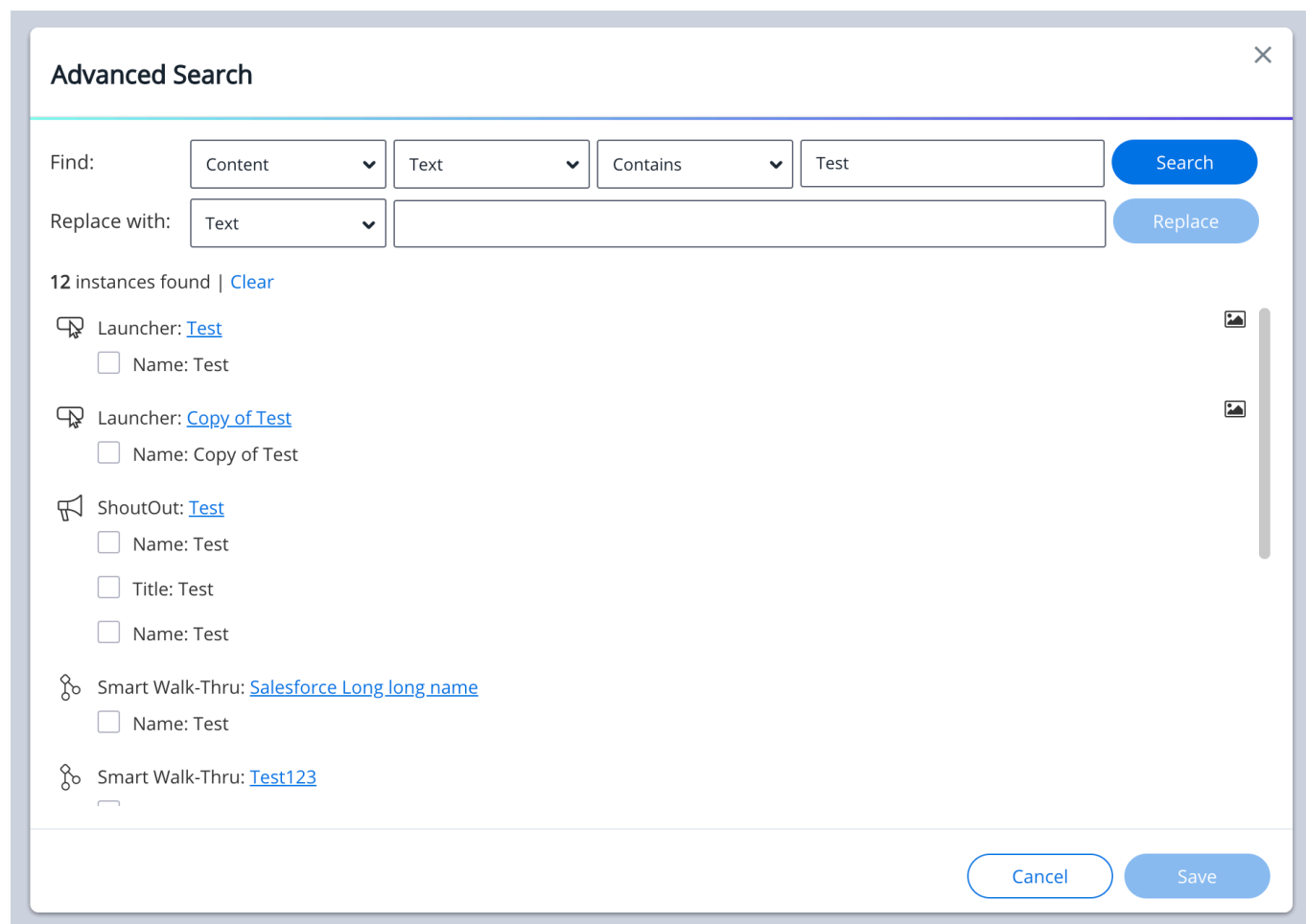
The Advanced Search results will also display the Deployable type, name, and all Deployable steps/items nested within.



The screenshot shows the 'Advanced Search' modal window. At the top, it has a title 'Advanced Search' and a close button (X). Below the title, there are two rows of search criteria. The first row is labeled 'Find:' and contains four dropdown menus: 'Content', 'Text', 'Contains', and 'Test', followed by a blue 'Search' button. The second row is labeled 'Replace with:' and contains a dropdown menu set to 'Text' and an empty text input field, followed by a blue 'Replace' button. Below the search criteria, it says '12 instances found | Clear'. The results are listed below, each with a small icon and a link to the instance name. The first result is 'Launcher: Test' with a checkbox for 'Name: Test'. The second is 'Launcher: Copy of Test' with a checkbox for 'Name: Copy of Test'. The third is 'ShoutOut: Test' with checkboxes for 'Name: Test', 'Title: Test', and 'Name: Test'. The fourth is 'Smart Walk-Thru: Salesforce Long long name' with a checkbox for 'Name: Test'. The fifth is 'Smart Walk-Thru: Test123' with a checkbox. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

How to use "Replace with"

Once an Advanced Search is successfully completed, the "Replace with" UI will appear in between the query results and the "Field" search sections.



The screenshot shows the 'Advanced Search' dialog box. At the top, there is a search bar with the following configuration: 'Find:' dropdown set to 'Content', 'Text' dropdown set to 'Text', 'Contains' dropdown set to 'Contains', and a text input field containing 'Test'. To the right of this bar are 'Search' and 'Replace' buttons. Below the search bar, the 'Replace with:' section has a dropdown set to 'Text' and an empty text input field. Below this, it says '12 instances found | Clear'. The results list includes:

- Launcher: [Test](#) (checkbox Name: Test)
- Launcher: [Copy of Test](#) (checkbox Name: Copy of Test)
- ShoutOut: [Test](#) (checkbox Name: Test, checkbox Title: Test, checkbox Name: Test)
- Smart Walk-Thru: [Salesforce Long long name](#) (checkbox Name: Test)
- Smart Walk-Thru: [Test123](#) (checkbox Name: Test)

At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Next, select which Element item(s) require an update via the checkbox to the left of a Deployable item that contains Element Selection data.

Advanced Search ✕

Find: Content Text Contains Test Search

Replace with: Text Replace

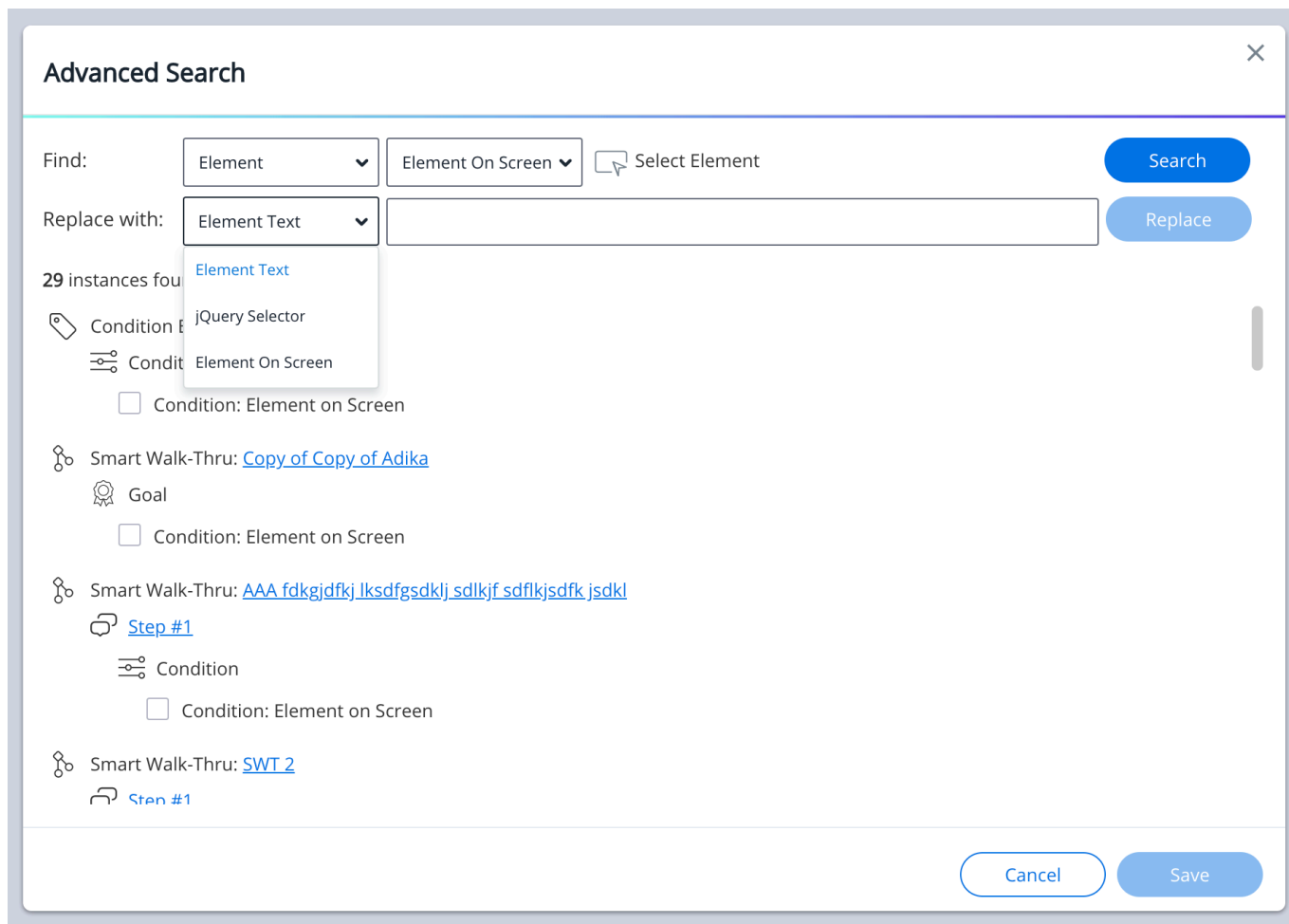
12 instances found | [Clear](#)

- 🖱️ Launcher: [Test](#) 🖼️
 Name: Test
- 🖱️ Launcher: [Copy of Test](#) 🖼️
 Name: Copy of Test
- 📣 ShoutOut: [Test](#)
 Name: Test
 Title: Test
 Name: Test
- 🔗 Smart Walk-Thru: [Salesforce Long long name](#)
 Name: Test
- 🔗 Smart Walk-Thru: [Test123](#)

Cancel
Save

Now, either click the:

- “Replace with” Element Description Property dropdown
 - User can select three options from Element Description Property types which include:
 - Element/Select Element
 - Replace an element(s) by selecting a new on-screen element via the Element Selection mode
 - jQuery Selector
 - Replace an element(s) jQuery selector
 - Often located within a Deployable item’s “Precision” properties tab
 - Element Text
 - Replace an Element Selection Captured using an element on-screen text string and replace the element selection with a new on-screen text string
- When “jQuery Selector” or “Element Text” is selected, next, enter a jQuery string value or text string value into the input box.



Click "Replace."

Once you have clicked "Replace" the replaced item will be removed from the search list.

Please Note:

Clicking "Replace" only holds the new selection or string value to Advanced Search's client. The new selection or string value will not be pushed from the client into the WalkMe database until the "Save" button within the Advanced Search modal (located bottom right) is clicked.

Optionally, clicking the "Play button" next to a deployable item will minimize the editor drawer.

- Clicking the "Play button" before a deployable item's element capture has been replaced will display the original element selection on-screen.

- Once the “Replace” button has been clicked, followed by clicking the Play icon, the deployable items will display (on-screen) next to or on the newly replaced element selection.

Optionally, clicking/hovering on the image icon will display the website/platform/system Element Capture screenshot.

- Clicking/hovering over the image icon before a deployable items element capture has been replaced will display the original element selection screenshot.
- Once the “Replace” button has been clicked, the screenshot of the deployable item will update with the newly replaced element selection.

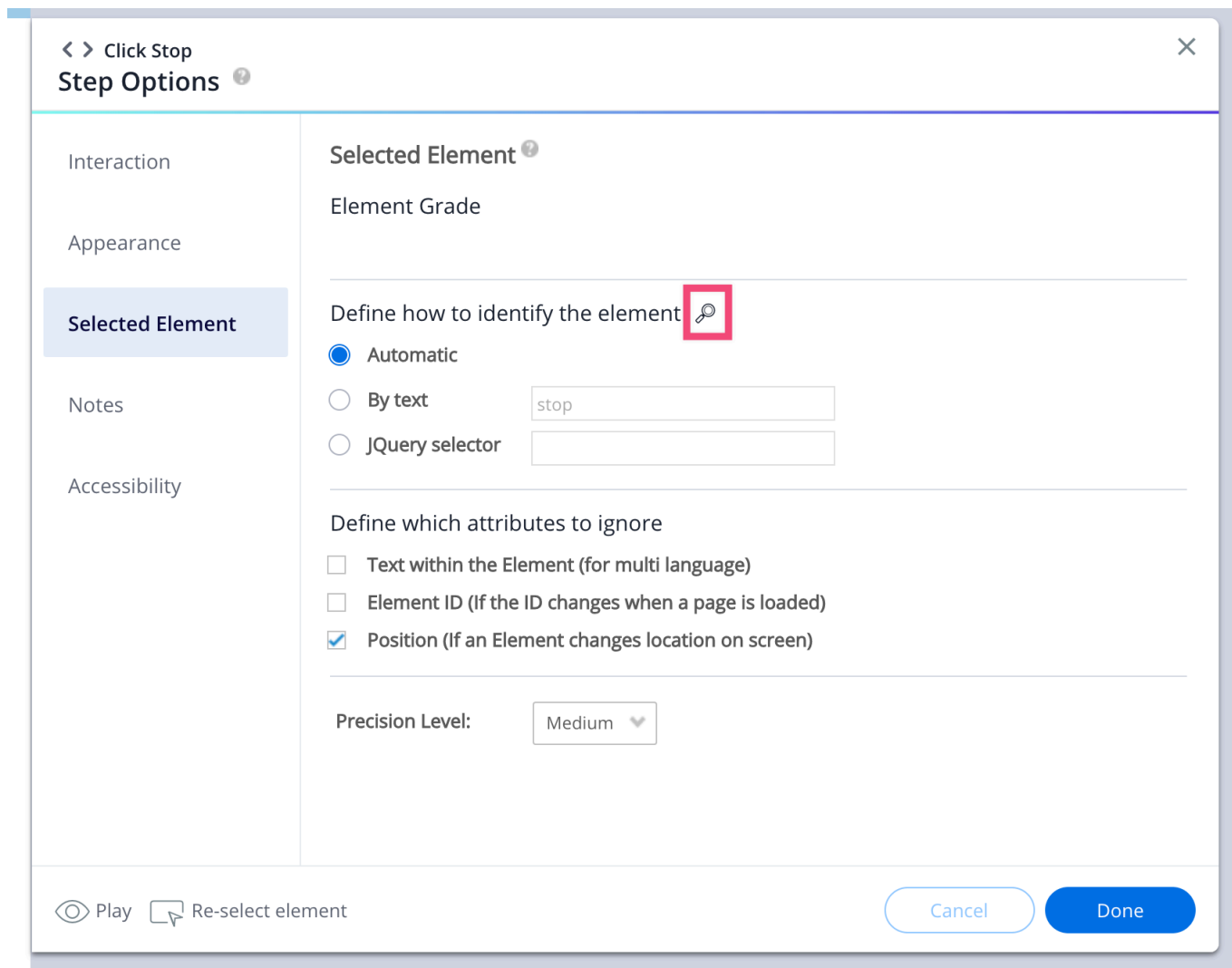
Finally, click “Save” at the bottom right of the Advanced Search modal to finalize and push the newly replaced Element Selection to the WalkMe database.

Anytime a user navigates away from the Advanced Search modal followed by returning to the Advanced Search modal, the user will find the last search they made cached and available to continue using until a new search is made.

How to find an unknown Element

In the use case in which a user does not know and can not search an element by its class, id, etc, or the element is no longer available to select from the on-screen selection mode. The user can locate the element by navigating to the "Selected Element" tab within a items property screen.

From the "Selected Element" tab, hover over and click the Advanced Search magnifying glass icon.



Clicking the Advanced Search magnifying glass icon will start an automatic search of the captured element and open the Advanced Search modal.

Within the Advanced Search modal, user will be able to locate all captured elements, automatically.

Here, you can replace the element following the standard replace process.