

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

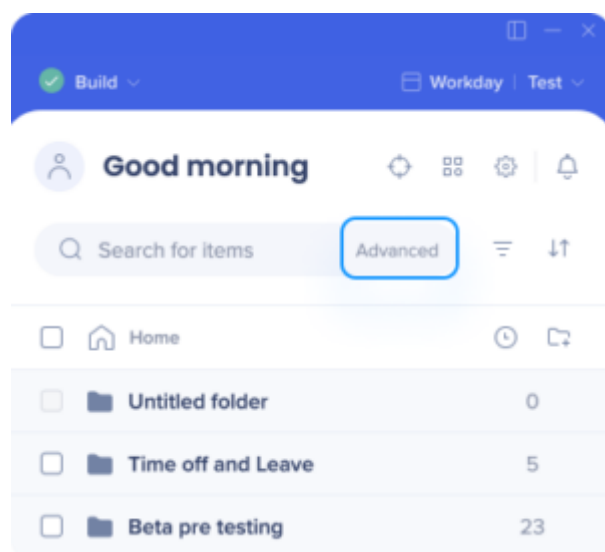
WalkMe's Advanced Search feature allows users to quickly locate, update, and maintain Element Selections within a WalkMe implementation by Id, class, text, URL, and more.

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 launch the Advanced Search modal click the button within the search bar:



Please Note:

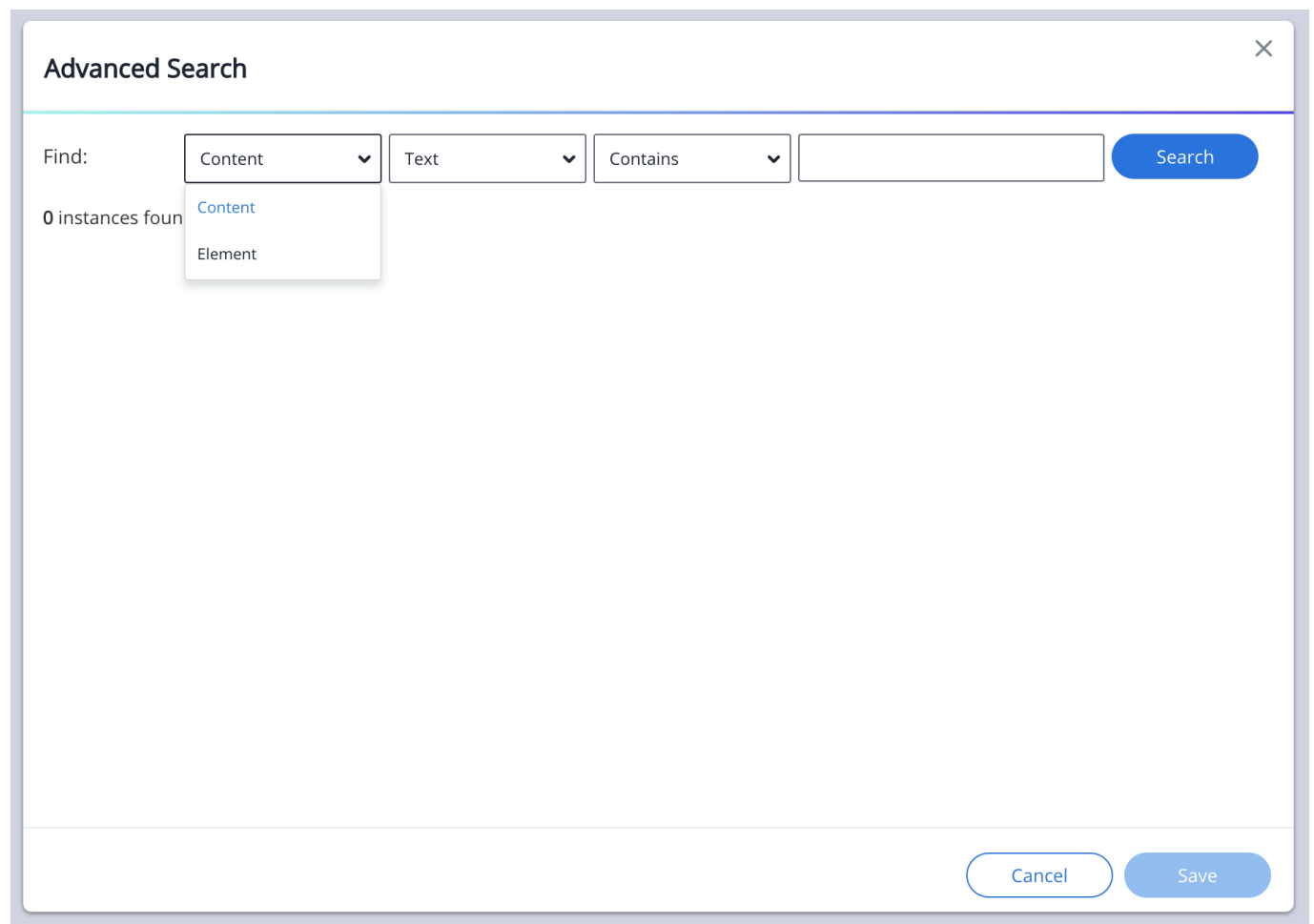
If the WalkMe implementation contains a large amount of deployable/element selection data, the first time Advanced Search is opened, it may take up to 10 seconds to display; this is due to the Editor database caching and passing data to Advanced Search's client for the first time.

How to Use “Field” Search

With the Advanced Search modal open:

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

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



The screenshot shows the 'Advanced Search' modal window. At the top left is the title 'Advanced Search' and a close button (X) at the top right. Below the title bar, there is a search interface. On the left, it says 'Find:'. To its right are three dropdown menus: the first is set to 'Content' and has a dropdown menu open showing 'Content' (highlighted in blue) and 'Element'; the second is set to 'Text'; the third is set to 'Contains'. To the right of these dropdowns is a text input field. Further right is a blue 'Search' button. Below the search fields, it says '0 instances found'. At the bottom right of the modal are two buttons: 'Cancel' and 'Save'.

Next, click the Element Description Property dropdown.

1. Select a single Element Description Property from the dropdown list.
 - Element Description Property types include:
 1. **Text** *(Available when the Context Description Property is set to “Content”)*
 - Search text content within a Deployable item
 2. **Id** *(Available when the Context Description Property is set to “Element”)*
 - Search for elements by their unique HTML Id attribute
 3. **Class** *(Available when the Context Description Property is set to “Element”)*
 - Search for elements by their HTML class attribute
 4. **Element Text** *(Available when the Context Description Property is set to “Element”)*
 - Search for elements by visually readable on-screen element text
 5. **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](https://www.walkme.com).”
 6. **Path URL** *(Available when the Context Description Property is set to “Element”)*
 1. Search for elements by URL path (or stem)
 1. 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.
 7. **Search for elements jQuery selector** *(Available when the Context Description Property is set to “Element”)*
 1. Often located within a Deployable item’s “Selected Element” tab properties.
 8. **Element on Screen** *(Available when the Context Description Property is set to “Element”)*
 1. Search for elements by selecting the element via on-screen element selection mode

Advanced Search

Find:

Content

Text

Contains

Search

0 instances found

Text

Cancel

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.

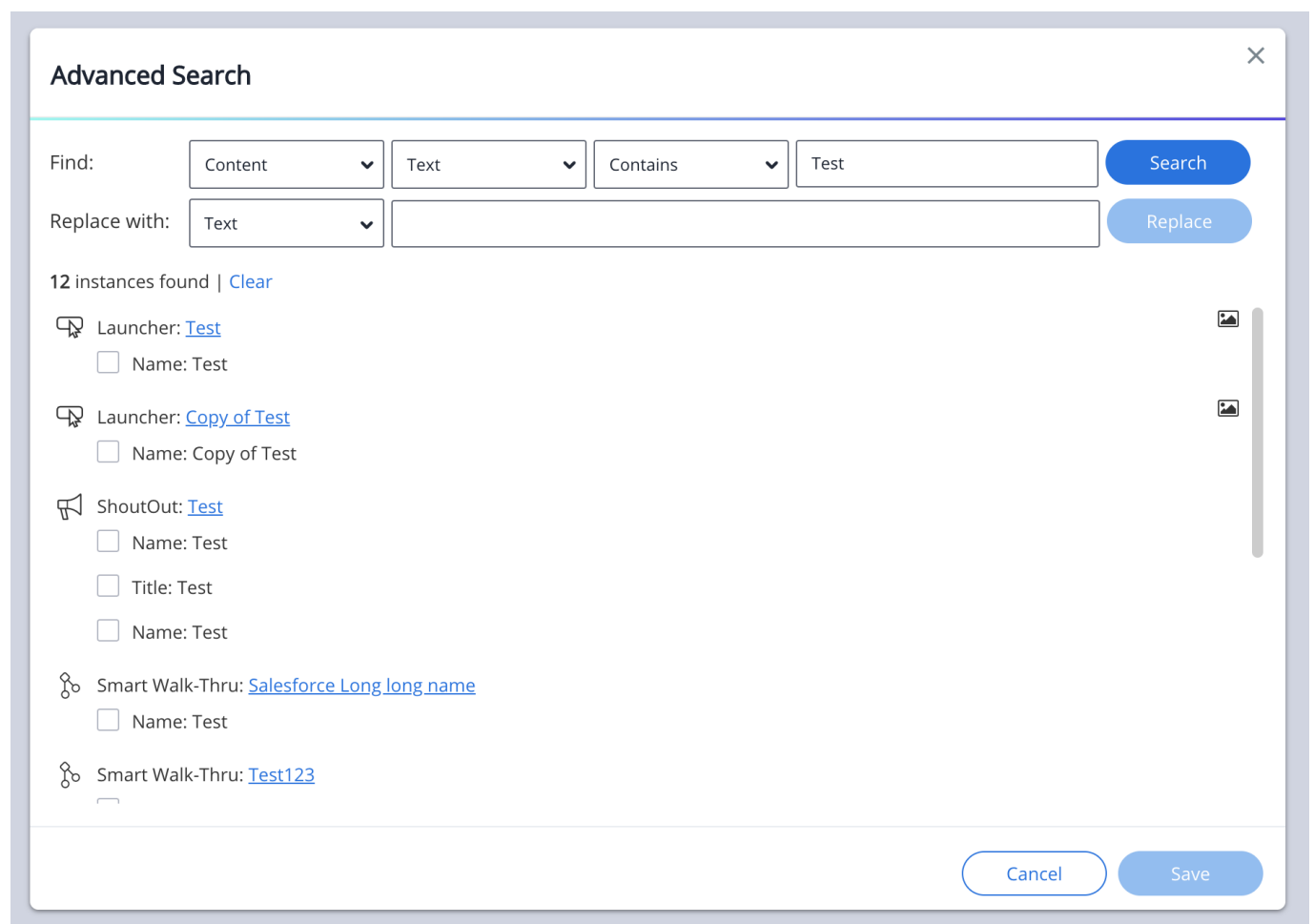
Click “**Search.**”

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 with a close button (X) in the top right corner. The modal is divided into several sections:

- Find:** A row of four dropdown menus: 'Content', 'Text', 'Contains', and 'Test'. To the right is a blue 'Search' button.
- Replace with:** A row with a dropdown menu set to 'Text' and an empty text input field. To the right is a blue 'Replace' button.
- Results:** Below the input fields, it says '12 instances found | Clear'. The results are listed with icons and text:
 - Launcher: [Test](#) (with a checkbox for 'Name: Test')
 - Launcher: [Copy of Test](#) (with a checkbox for 'Name: Copy of Test')
 - ShoutOut: [Test](#) (with checkboxes for 'Name: Test', 'Title: Test', and 'Name: Test')
 - Smart Walk-Thru: [Salesforce Long long name](#) (with a checkbox for 'Name: Test')
 - Smart Walk-Thru: [Test123](#) (with a checkbox for 'Name: Test')
- Footer:** 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.

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

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:

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

Advanced Search

Find:

Element

Element On Screen

Select Element

Search

Replace with:

Element Text

Replace

29 instances found

Condition Element

jQuery Selector

Condition Element On Screen

Condition: Element on Screen

Smart Walk-Thru: [Copy of Copy of Adika](#)

Goal

Condition: Element on Screen

Smart Walk-Thru: [AAA fdkgjdfkj lksdfgsklj.sdlkjf sdfkjjsdfk jsdkl](#)

Step #1

Condition

Condition: Element on Screen

Smart Walk-Thru: [SWT 2](#)

Step #1

Cancel

Save

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 deployables items 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.

Limitations

- Classic Walk-Thrus are not supported - no results will be found via the Advanced Search
- Smart Walk-Thru steps that were built using the Visual Designer (in Workstation/Desktop) are not supported - no results will be found via the Advanced Search
- ShoutOuts that were built using the Visual Design are not supported

Note

When using the search function, it searches the raw, exact text that is in the text box, not what is displayed in the balloon itself. As such, if you have some content that is bold only on the X of the text, then you would need to include the code that matches that raw text for the balloon. For example, for bolded content it would like be [b]X[/b] or [bold]X[/bold]

How To Video

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.

< > Click Stop

Step Options ?

X

Interaction

Appearance

Selected Element

Notes

Accessibility

Selected Element ?

Element Grade

Define how to identify the element 🔍

☒ Automatic
 ☐ By text
☐ JQuery selector

Define which attributes to ignore

☐ Text within the Element (for multi language)
 ☐ Element ID (If the ID changes when a page is loaded)
 ☒ Position (If an Element changes location on screen)

Precision Level:

👁 Play

🔍 Re-select element

Cancel

Done

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.

Tip

Classic WTs are not returned when using Advanced Search