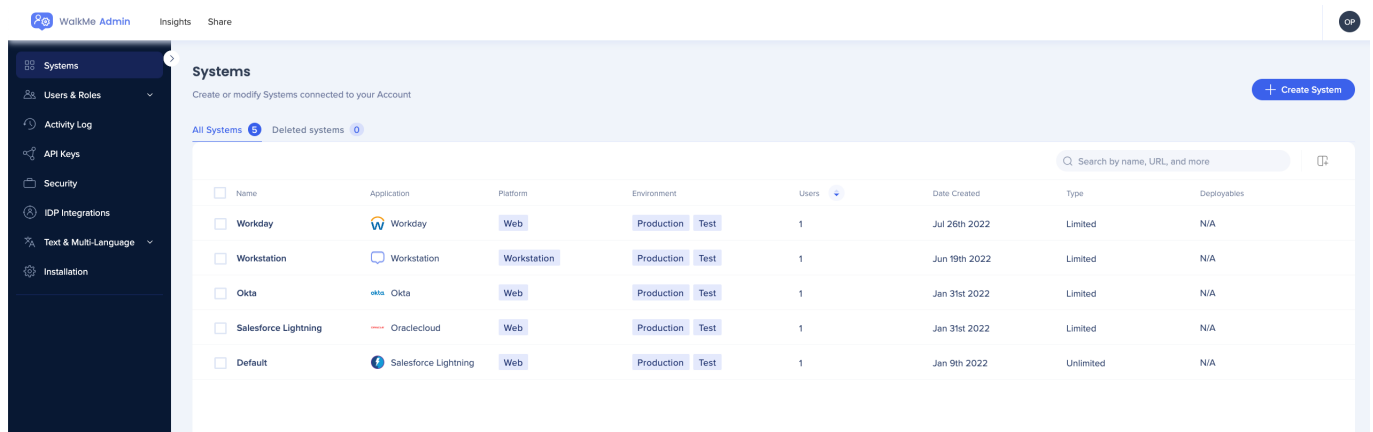# WalkMe Systems

Brief Overview

You can view and manage all of your WalkMe systems from the **Admin Center** at **admin.walkme.com**. In this article we will go over all system options.

Systems Page Overview

The **Systems** page in the Admin Center lists all of the systems available in your account and provides the following information for each:

- **Name:** The name of the system
- **System:** The type of system
  - The specific web application (for example, "Gmail")
  - Custom web system
  - Workstation system
- **Platform:** Web, mobile or workstation
- **Environment**: Production, test (created by default), or custom environment
- **Users:** The number of users assigned to the system
- **Date created:** The date the system was created
- **Type**
  - **Limited** is a "trial" system on which you can build up to 3 items
  - **Unlimited** is a paid system and you can build as many items as needed on that system
- **Items:** The number of WalkMe items created on this system
- **User Identifier method:** The current "User Identifier" setting for that system
- **Status**:
  - **Green**: Active on the extension

- **Red**: Inactive on the extension

What is a limited system?

Every new system is created as trial by default with the ability to expand working with WalkMe on further apps. Please reach out to your Customer Success Manager or WalkMe contact for more information.

Click **Manage columns** to add more columns if you do not see them on the page.

System Search

The search bar in the Admin Center allows you to find systems by:

1. **System name**
2. **URL:** Enter a URL to find systems that are configured to load on it
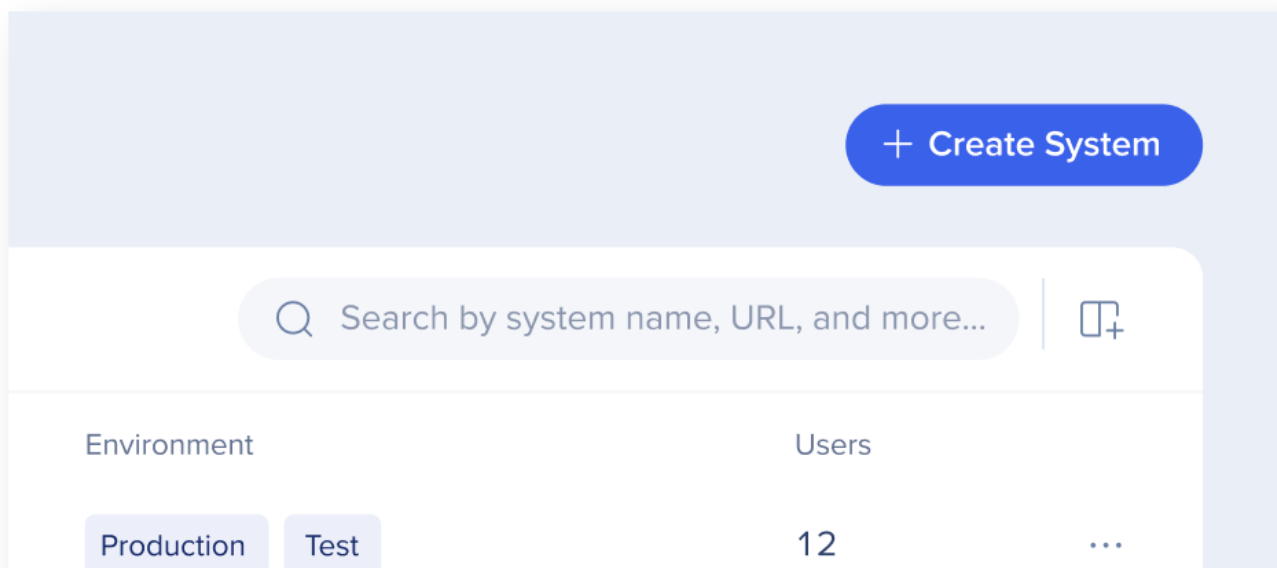
Search example:

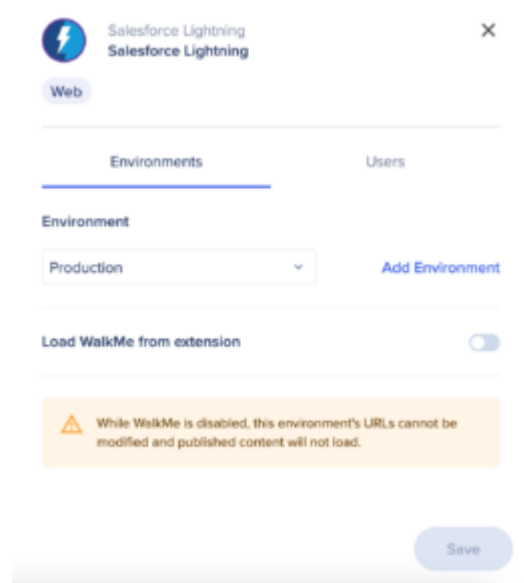To locate the system with the configurations below, you can search for "www.cloud.infor.com" or "https://www.inforcloudsuite.com/mysite"

Note

When searching by URL, results will only be shown if a system is configured to load on the exact URL that was searched for and the toggle "Load WalkMe from extension" is turned on.

Add New System

Add web system

Create a new system and the or select one of predefined ones. New systems are created as "Trial" systems meaning their Editor capabilities will be limited.

Add a system   ×

System Details

	System Type	Web
	System Name	

System Name

_____

Select System Type

🔍 Search...

Available System Types

Alison	Custom Type	ADP mykplan	Ambassador
Carahsoft	CloudHQ	Cypress	Doodle

Back   Create System

1. Click **Create System**
2. Click **Web**
3. Enter the system name
4. Select the system type
   - Systems in the list automatically enable relevant preset configurations
   - If you cannot find your system type, select **Custom Type**
5. Click **Create System**

Once a system is assigned you cannot reassign it.

Create multiple systems for the same platform

It's possible to have several instances of pre-defined systems that are for the same platform type (for example, multiple systems for Salesforce). Create each one as usual to have multiple systems that contain the necessary pre-set configurations for that platform.

Add Workstation system

1. Click on the **+ Create System** button
2. Select **Workstation** platform
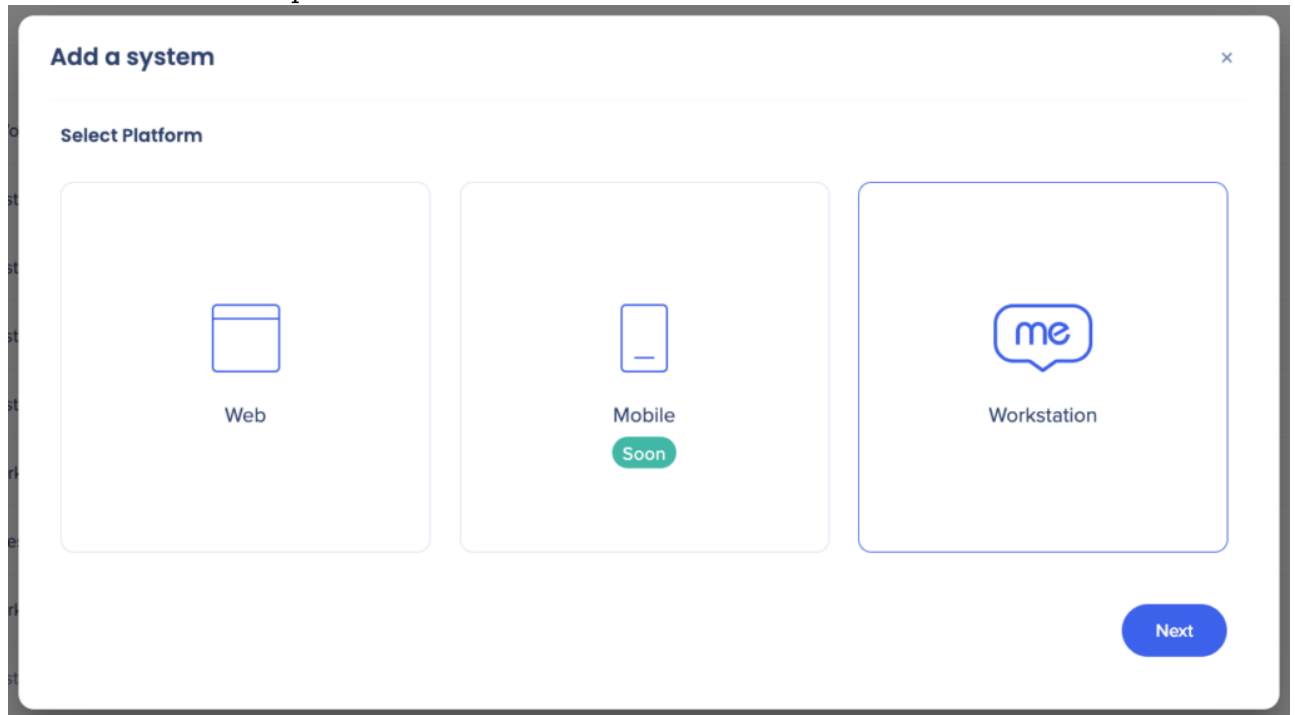
3. Name your new system
4. Click **Create System**
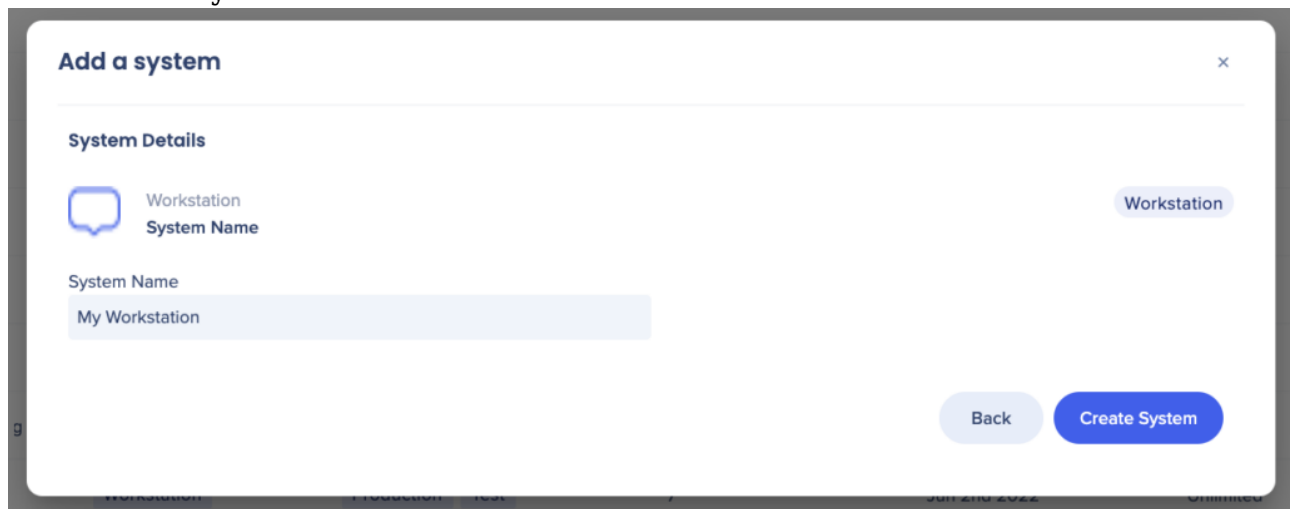
5. Add environments and users to your newly created Workstation system
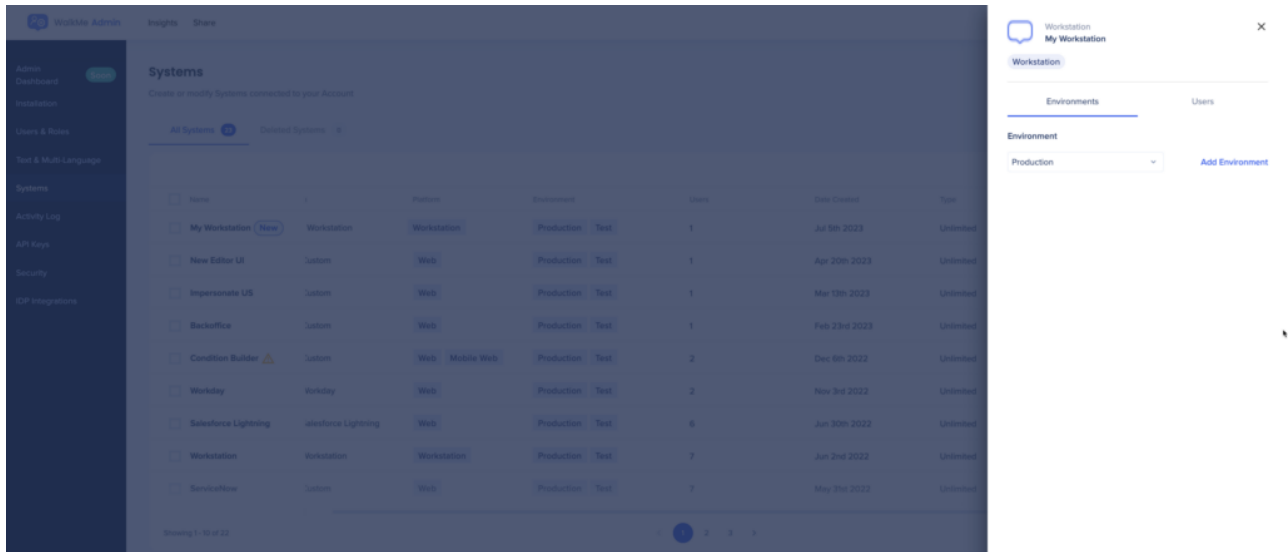
6. Your system will be visible in the **Systems** page
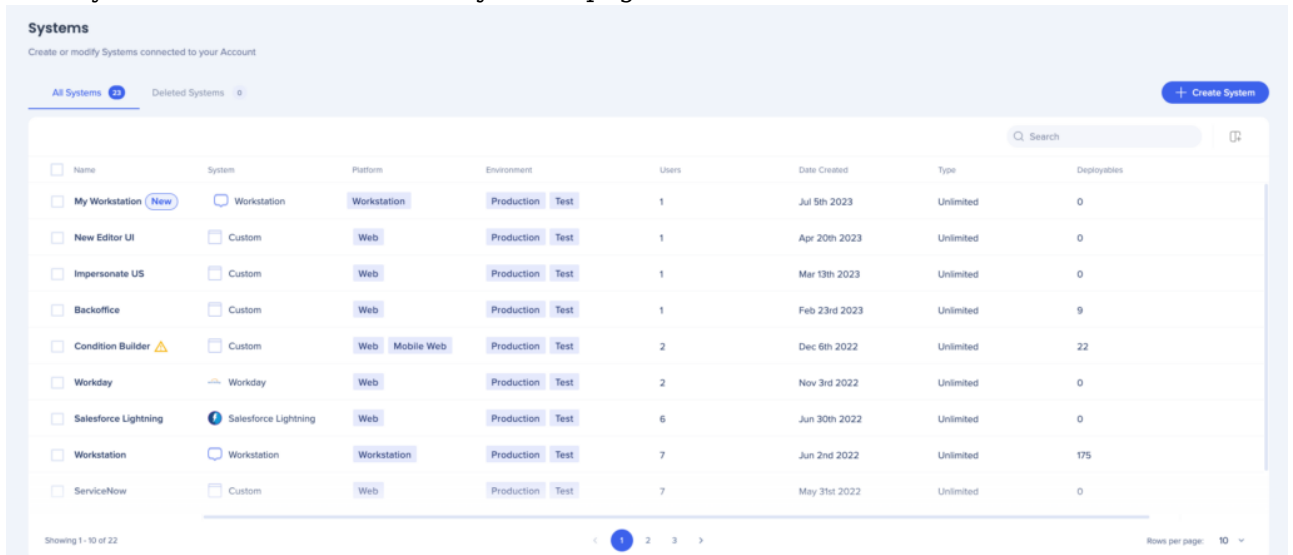
Learn more about Workstation: [**WalkMe Workstation**](#)

Manage Systems

Open Beta

Click **Try Now** to experience the new system management in the Admin Center

[System Management](#)
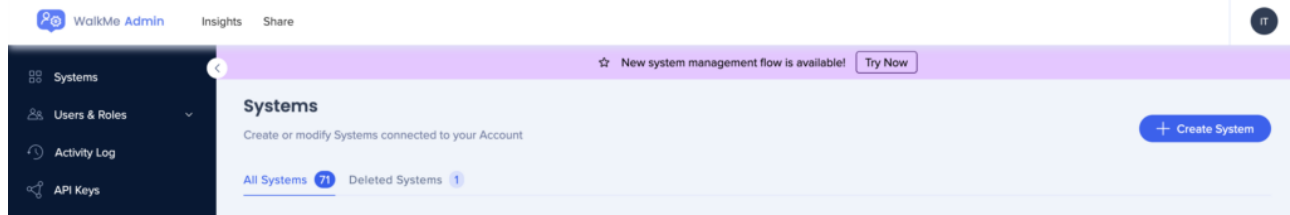
Edit system type
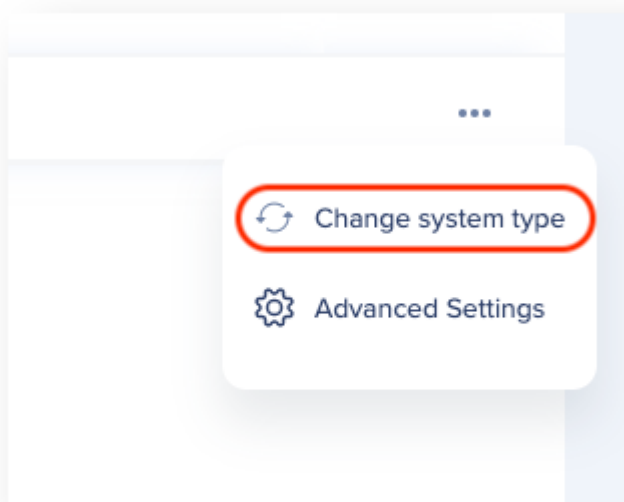
1. Hover over the custom system you want to change
   - Click on the 3 dot options menu
   - Click **Change system type**
2. Choose the relevant system from the list and click **Change System Type**

Change system name

1. Click on a system from the system dashboard
2. Hover over the system name and click the pencil icon to edit the name

Assign users to a system

1. Click on a system from the system dashboard
2. Click **Users**
3. Click **Assign Users**
4. Select the users you want to assign
5. Click **Assign**

Add new environment

1. Click on the system you want to configure
   - A side panel will open up
2. Click **Add Environment**
3. Enter an environment name and click **Add Environment**
4. On the environment configuration page, select the environment that you created
   - If your test and production environments use the same URL, you only need to configure the production URL
5. Turn on or off the **Load WalkMe from extension** toggle
   - By default, this is turned off for newly created systems
   - This must be set for each environment and needs to be configured separately for test and production environments
6. If using an extension to load WalkMe, enter the relevant URL in the text box
   - Use Match Patterns rules
     - Learn more
   - A placeholder will display until you add your own URLs
     - If you selected a known system type, those URLs will be shown
     - For example: lightning.force.com
7. Click **Save**

Load WalkMe from extension

- Turning on the toggle allows you to configure what URLs the system should load on
- Turning off the toggle will disable the current configuration on the extension level
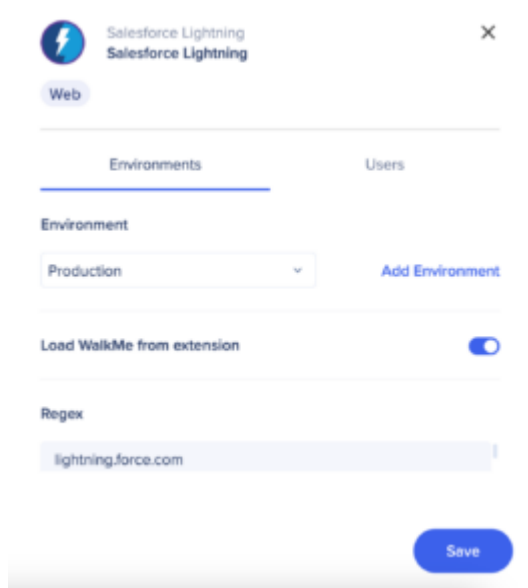
Note: This setting has no impact on snippet implementation.The snippet code will work whether the toggle is turned on or off. [Read more about snippet implementation](#).

URLs

- List of URL patterns dedicated to match your application
- The following syntax is supported:
    - Start with: **https://** or **http://**
        - **Note**: If both are required, create two separate patterns
    - Followed by: **www.domain_name.com**
    - End with:
        - **/path** to specify the exact path to the pages where WalkMe should load
        - **/some*path** to specify the static and reliable part of the path, but also account for dynamic part of the path with a wildcard asterisk (*) which can be added anywhere in the path name
        - **/*** if WalkMe should load on any page under the domain
            - [Read more about URL match pattern](#)

URL example:

- If you wish to configure the extension to load on https://admin.walkme.com, regardless of the page under the given domain, the pattern would look like this:
    - https://admin.walkme.com/*
- If the extension should load on specific pages only, for example on https://admin.walkme.com/systems/all-systems, the template would be identical to the URL:
    - https://admin.walkme.com/systems/all-systems

Advanced System Settings

Configure an extension or snippet in the advanced settings.

1. Hover over the system you want to configure
   - Click the 3 dot options menu
   - Click **Advanced Settings**
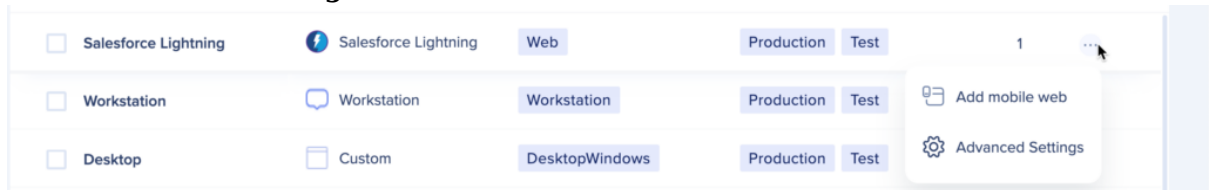
2. The **Advanced System Settings** popup will appear
   - Choose if you want to configure the system to run on "Extension" or "Snippet"

Extension configuration

- **Load WalkMe on this environment toggle:** Should be turned on for WalkMe content to be active and available on this environment
  - [Duplicate of settings in **Load WalkMe from extension toggle**](#)
- **If you have an active WalkMe Extension and snippet:** Allows you to control the loading order and logic for each setting
  - **Load the snippet first**: If your website contains a snippet embedded in the HTML and this system is also configured on the extension, turning on this toggle will prioritize WalkMe content to load using the snippet over the extension
  - **If the snippet doesn't load, load the extension:** Available only if **Load the snippet first** is turned on, turning on this toggle acts as a fallback setting, allowing the extension to load the system on the page only when the snippet doesn't load WalkMe within 1 second
  - **Load WalkMe on cross domain iFrames:** Allows the extension to load on cross domain iFrames if such exist in the application and extension configuration matches the iFrame URLs

- **Top domain validation:** Allows you to configure the extension to load in certain scenarios
  - **On all domains:** Recommended and selected by default, this will allow you to load the extension on any top domain as configured in the initial URL settings
    - [Learn more](#)
  - **On specific domains:** Displays the URL match pattern input field dedicated to match the top domain URLs

Top domain is the main URL you see in the address bar of the browser tab
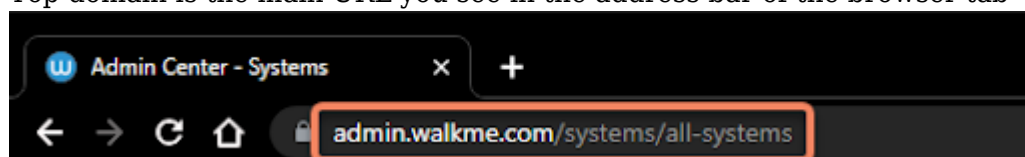
Snippet configuration

1. Choose **Snippet**
2. Copy the snippet code and embed it in your website's HTML
   - Make sure to copy the correct snippet for each environment (Test, Production, etc.)

Limitations

There is currently a limitation where some of the WalkMe Admin Center data is restricted for users with a snippet implementation. Specifically "Total Users" data.