

First Edition 2014

WalkMe User Manual



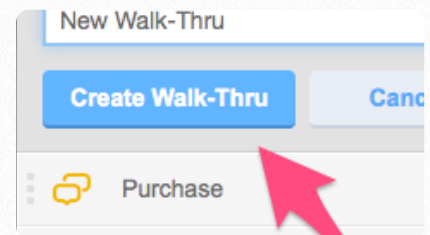
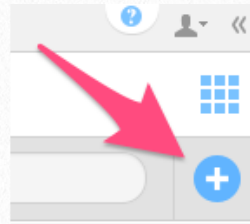
Creating Your First Walk-Thru



Create a Walk-Thru

Creating a Walk-Thru is simple and straightforward. Check out this gallery for a guide, or use the Walk-thru on the editor from more GPS-like guidance.

Click the Plus sign to create something new. Once you've named your Walk-Thru, click "Create Walk-Thru"

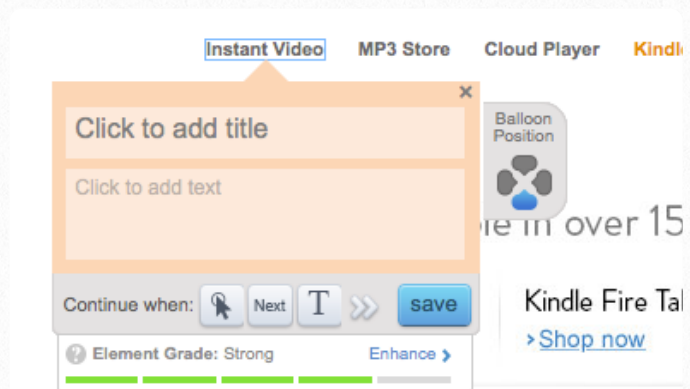
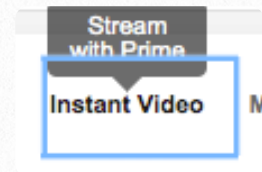


Create a Step

Once you've created a new Walk-Thru, create a new step.

Once a blue highlighter appears, use it to select a step.

Give your balloon a title, select a trigger, and press save.

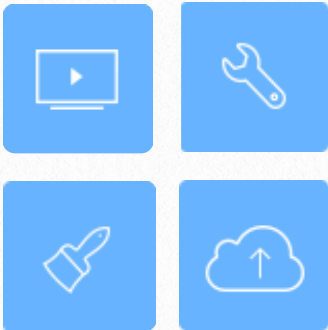
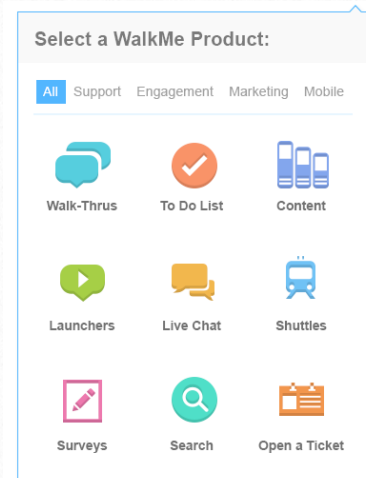


Editor Functions

The App Launcher:

Use the app Launcher to navigate the WalkMe Editor.

Here, you have access to all the different WalkMe Services such as Launcher, Content, Search Engine Integration, On-boarding List, Live Chat, and Open a ticket



Navigation Bar:

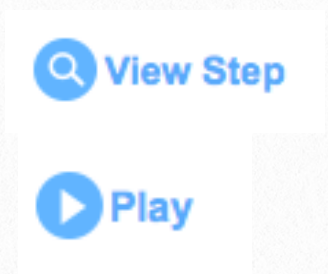
Use the navigation bar to preview you work, access the settings for your WalkMe Account, Customize your Balloons and Widget, and Publish your Walk-Thrus and other WalkMe solutions to your site.

Play and Preview Your Work:

Play and Preview functions allow you to check your Walk-Thrus, see how they function, and check the design before Walk-Thrus are published and your users can see them.

The Preview button in the navigation bar will present a full simulation of WalkMe on your site.

You can also play a specific Walk-Thru or a step without minimizing the editor by clicking the “Play” or “View” buttons.



Customize Your Balloon and Widget



Widget

The widget consists of a tab that appears on the edge of the screen.

The user clicks the widget and a full menu of your Walk-Thrus and Content will appear. To customize your widget, click the paintbrush in the Navigation Bar.



Once you click the “Customize Widget” tab you will be able to change how the widget on your site looks. There are a number of configurations you can use to alter the widget to your liking:

- The Player tab will define the shape of your widget
- The Menu tab will define how the widget will look when opened

- The Theme tab will set the color scheme for your widget. You can also alter the colors individually, this will not change the preset theme defined by WalkMe.
- In the Attention Grabber tab you’ll find a number of animations which can call attention to your widget
- In the Text tab you can change what text appears in the widget
- Within the Settings tab you can define text direction, language, or set a condition for when the Widget will appear

Balloon

The Customize Balloon is accessed by clicking the Paintbrush in the Navigation Bar and clicking the “Customize Balloon” tab. You can select a pre made theme, or design your own balloon by using the Font& Shape, and Colors tabs within the menu. You can alter the:

- Ballon Font
- Balloon Color
- Text Colors
- Balloon Border
- Next Button color
- Next button border
- Shadows

You may also add an animation to draw attention to the balloon as it appears on the site.

You can also customize how the balloon interacts with the site: You can use the Customize on Screen Button to see your changes live.

Customize on Screen!

Add a highlighter to your step to make it more noticeable in “Customize Step.”

Highlighter

A highlighter is a box that is set around the element, and further distincts it from the rest of the page.

Thickness

Color

Highlighter Position

Position: Top

Left

Size: Width

Height

OF

You can also alter the balloon position by a couple pixels if needed.

A Z-index specifies the stack order of an element compared to other existing elements on the same webpage. An element with a greater stack order will be in front of

an element with a lower stack order. A Z-index of a step specifies the balloon's stack order in comparison to the existing elements on the webpage.

Z-Index

Set the Z-Index of the balloon to specify the stack order of the ballon, and display it on top of the existing elements in the page.

Value

OFF

Spotlight Balloon let's you create an effect where the entirety of the page will seem darkened, opposed to the element that says lit.

Spotlight Balloon

A spotlight is a box that is set around the element, and further distincts it from the rest of the page.

Opacity

Color

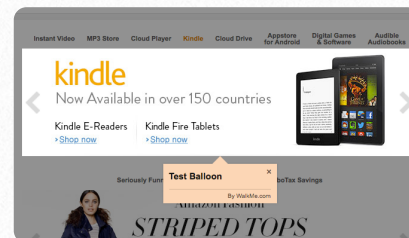
Spotlight Position

Position: Top

Left

Size: Width

Height



CSS

Customizing the Widget and Balloons through CSS is also possible. Please refer to our [complete CSS guide](#) for more information.

Flow



Play Step Conditions

A [Play Step Condition](#) lets you determine when a step will play. By setting a condition, which we will discuss in the next section, based on something that exists on-screen (Such as an “Admin” or “Sales Person” identifier), a specific URL, etc. If the condition you designed returns “False” that means that this step will be skipped and the Walk-Thru will move on. Thus, we can also use Play-Step conditions to prevent Walk-Thrus from breaking by adjusting the flow.

You can access the Play Step Condition by accessing step options (Click a step), and then clicking “Flow” in the sidebar.

Skippable Steps

Making a step [skippable](#) means that the Walk-Thru will not break if for some reason the step could not be found. While both Play Step Conditions and Skippable settings can create a situation in which a step is skipped, a skippable step if focused on whether or not the element selected is present or not. Whereas a Play step Condition can be based on anything available in the condition builder, and is a

much more controlled way to have a step skipped because you define the parameters.

There is an additional function within Skippable settings: “If this step is found it must be completed.” By default, this setting is selected, which means that if a step is found (i.e. it is not skipped), and a balloon appears the user must complete the action. Unchecking this setting will create a step that does not need to be completed: If the element is found it will appear, but even if the step is not completed, the Walk-Thru will move on.

Sticky Steps

The [Sticky](#) option means that the Walk-Thru will not continue unless the step trigger has been activated, and the current step will remain visible until it does so.

The Sticky step feature should be used when a step is attached to an element that might disappear from the screen, which is very common in hover menus or when the page might be refreshed but the step needs to stay in place.

Condition Builder



Conditions are used across the WalkMe Editor, such as in Action Steps, Play step conditions, Auto Play and Display Conditions and more, to direct the flow of the Walk-Thru.

Common Condition Types

On Screen Element: This condition is based on element selection, just as regular steps. It is the most common condition.

URL: This will base your condition on the URL on the current screen. You can use either part or whole of the website address in both “Contains” and “Does Not Contain” conditions.

On Screen Element Text: This condition will examine the text within a certain element you selected.

Walk-Thru Language: This condition limits what played based on the language of the Walk-Thru.

Referrer URL: This condition is based on the URL the user was on prior to this step.

Browser Type: This condition is based on the browser that the end-user is currently on.

The Condition Builder

The Condition Row

Each condition you set is displayed as a single row, which is made of 3-4 fields: The first is the condition type, and the rest are operators/text boxes: The icon on the right indicates the current status of the condition.



The condition result is False



The condition result is True



The editor cannot define whether it is true or false (and it will be determined only during the Walk-Thru run)

Condition Operators

- Is/Is Not
- Played/Was Not Played. This operator is only relevant for step history.
- Is/Is Not visible. This means that the element might exist on the page's code, but is/isn't not seen.

Action Steps



An [Action Step](#) differs from a regular step in that it performs a function, and does not have a guide balloon. You can use Action Steps to add adaptability to Walk-Thrus, cope with the challenges of creating a Walk-Thru, and cover a range of user scenarios. You can add an action step by clicking the arrow button next to the create new button.



- Wait for Condition, will wait for a condition that you set before the Walk-Thru proceeds
- Delay Walk-Thru

Action Step Triggers

Action Steps have triggers too:

- Always, which means the action will always occur
- By Condition (learn more about the [Condition Builder](#), or refer to the previous section), which will activate the action step only when certain parameters are met.

Types of Action Steps

- Redirect will redirect the user to a URL you select.
- Refresh Page
- Branch To Walk-Thru, allows you to connect the current Walk-Thru to another Walk-Thru
- Stop Walk-Thru
- Jump to Step will redirect the user to another step in the Walk-Thru.

Additional WalkMe Solutions



Launchers

Launchers are icons located in strategic areas on your site to increase engagement and can either open the WalkMe widget to display a menu of Walk-Thrus or even launch a Walk-Thru directly. With the use of the WalkMe Launchers, you can mitigate common problem areas on your site. You can place launcher on an FAQ page to help users start self-service, or even at the beginning of a complicated process in order to address issues before they even arise.

Onboarding

WalkMe Onboarding is a tool that lets you create a list of tasks for your end user to complete as part of a training process.

Content

You can integrate articles and videos into the WalkMe Widget on your site so that

they appear alongside Walk-Thrus to provide a more complete solution for your users. Alongside with Walk-Thrus and Articles, you can also add links to articles from your knowledge base that could be found directly from the Walkme Widget.

Search Engine Integration

WalkMe's widget can integrate search engine results from Google and other search engines, to offer a more diverse range of information to your users.

Adding Support Ticket

The WalkMe Superwidget has an option to include a link to open a support ticket, which will direct users to your help and support page to open a support ticket.

What is WalkMe? How do I use it?



What is our Product?

WalkMe is a SaaS product that allows you to Build Walk-Thrus on your site. Walk-Thrus act as a GPS system and help your user navigate through your site. WalkMe is beneficial accross many platforms an can be used from promotional purposes, customer service, employee training, and to create a friendly UX.

WalkMe offers a number of other services that present a clear and simple call to action on your site, and increase site proficiency in record time.

WalkMe Consists of the Editor, with which you create, design and publish your Walk-Thrus and other WalkMe services. The WalkMe widget is where your users will access all the WalkMe services you have published. Finally, you will be able to access data about WalkMe's performance on your site through our advanced analytics page: analytics.walkme.com.

How do I implement WalkMe on my site?

Our Widget will appear on your site, and your Walk-Thrus will appear once you have both implemented WalkMe on you site, and the relevant Walk-Thrus are published to your production environment.

Implementation consists of putting a Snippet (a small piece of code) into your site. The snippet must be present on all page on which you'd like WalkMe to appear. The Snippet code is permanent so this operation must be done only once.

After the content on you site/application has been loaded, the snippet will connect with WalkMe's servers in order to download and display the widget and your Walk-Thrus. Once the data has been downloaded to the browser, there will not be any more calls to the WalkMe servers, so there is no concern that the original website/application performance will be harmed.

Publish



How To Publish

In order to publish the Walk-Thrus on your account, click on the Publish Icon in the navigation bar, and then access the Publish tab.



environment. There is also “Test” environment designed such as a demo or sandbox site to let you view, run, and check your Walk-Through before they go live. This is the default.

Publishing States

Draft

A draft is a Walk-Through that has not been published. It will appear as orange.

Published

Published Walk-Thrus are live to your users and will appear in green.

Modified

Modified Walk-Thrus are published Walk-Thrus with unpublished changes. They are green with an *.

Archived

If you no longer wish to have a Walk-Through appear to users you can archive it. It will appear in grey.

Snippet Protocols

Before you implement the snippet on your site, and publish the Walk-Through to your site, you must verify that the snippet has a security protocol that is appropriate for your site. An HTTP protocol will load WalkMe only on page without secure content (i.e. HTTPS protocols). The HTTPS protocol will load WalkMe content across HTTP and HTTPS screens. The default is currently HTTPS, it is recommended that you keep this setting.

Publishing Environments

Walk-Thrus that you'd like users to see must be published to the “Production” en-