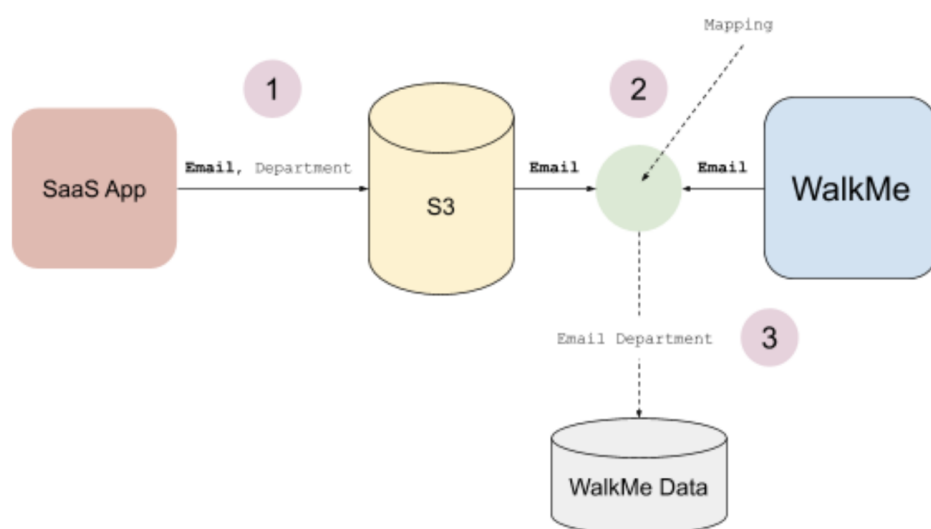


Amazon S3 Incoming Integration

Brief Overview

S3 Incoming Integrations can connect any third-party software, on top of S3, to WalkMe. The integration pulls attributes and populates data into WalkMe to use data from external systems in WalkMe for analytics and content segmentation.



Use Cases

Target WalkMe content based on CRM attributes:

- Display a ShoutOut only to “premium users” on your site
- Show a Smart Walk-Thru internally to employees that are from a specific department
- Use as a “User” filter category in Insights and our Report Builder

Target WalkMe content based on Customer Support / Success (such as ServiceNow, Zendesk) attributes:

- Show an NPS survey to all customers that opened more than 2 support tickets

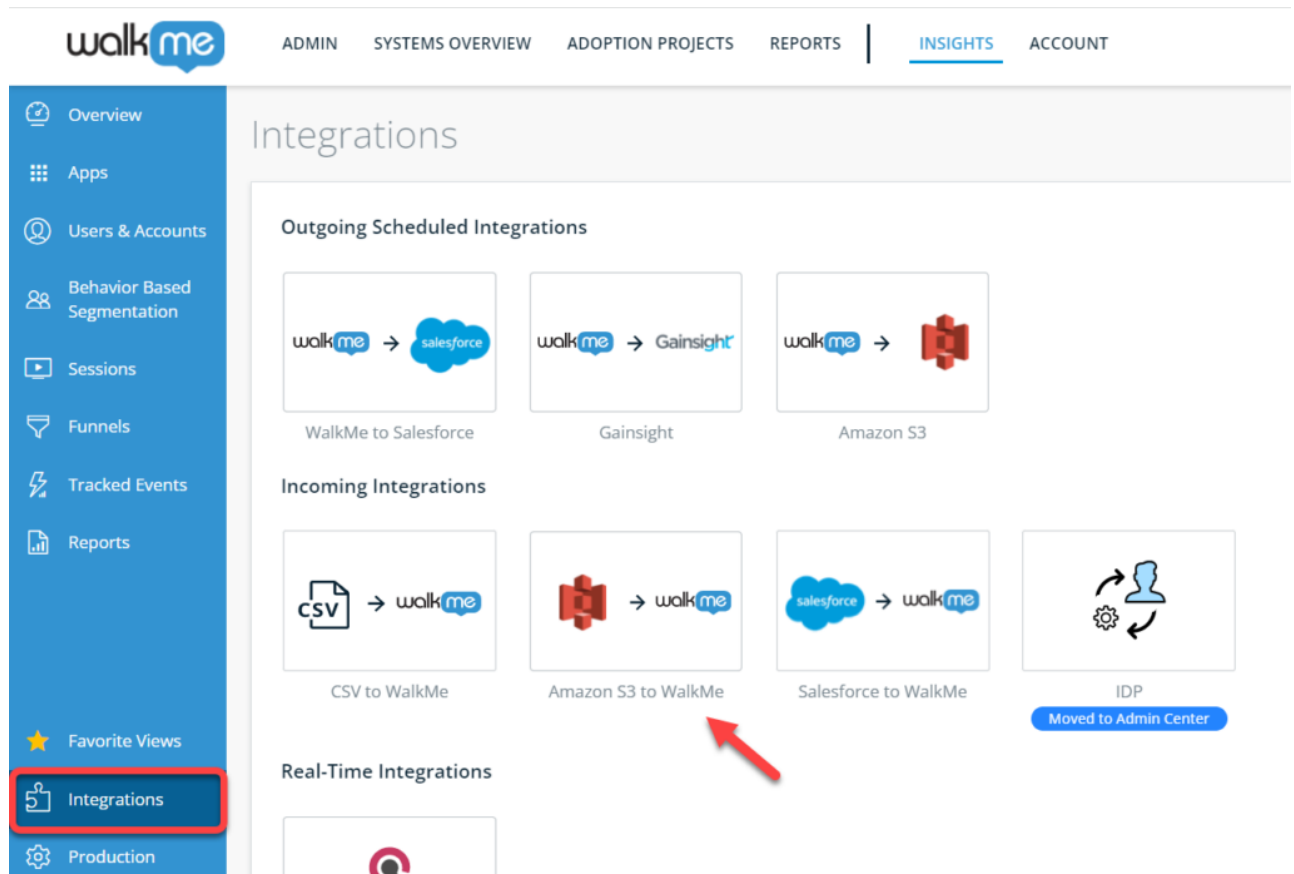
Prerequisites

In order to map the integration attributes into WalkMe, a unique user id needs to be defined and the 3rd party service for integration needs the data to be stored on S3 in a CSV format.

You can then place the CSV file on a specific bucket on S3 and WalkMe will then read this file and based on this file attribution information can target end users.

Creating an Incoming Integration

1. In the “Integrations” page of [Insights](https://insights.walkme.com) at insights.walkme.com, select “Amazon S3 to WalkMe”:



2. Click “+ New Integration” and follow the wizard instructions to set up your S3 bucket URL, permissions, and source file (CSV)
 - **Note:** Basic authentication is supported and can be provided during setup (see below)

New Amazon S3 Integration

✕

1
Set Source & File

2
Select Columns

3
Schedule & Save

Set Source

+ New Source

Source Name

My Source Name

Bucket

my-bucket-name

Region

US West (N. California) ▼

Authentication Method

Provide Credentials (Access Key & Secret Key) ▼

Access Key

WALKMEAMAZONBUCKETKEY

Secret Key

wjAlrXUtnFEMI/K7MDENG/bPxRfiCYEXAMPLEKEY

Path & File Name

my/path/filename.csv

3. After data discovery, map the **user identifier** and select the wanted properties (i.e. attributes) to pass on to WalkMe for targeting
 - **Note:** You can change the names of these properties if desired (this is the name you will see in the Editor)
 - A prerequisite for using the integration is setting up a Unique User ID in the WalkMe Editor

New Amazon S3 Integration

1 Set Source

2 Map Columns

3 Schedule & Save

Choose the column that identifies each unique user in the source file.

Unique User Identifier Column ?

Select column to identify users by

Unique User Identifier Attribute ?

Select column to identify users by

Match the unique user identifier column in the source file and an existing property to continue

Properties to Import (3/10 Properties available)

By default, properties are imported with their original name. You can rename properties for better readability.

☒ email ?

→ something .else

Rename Property

☐ role ?

Rename Property

☒ department ?

Rename Property

☒ joined.date ?

Rename Property

< Back

CONTINUE >

4. After completing step 3, you will receive a success or failure message
 - If necessary, follow the instructions to resolve the failure

New Amazon S3 Integration

1 Set Source

2 Map Columns

3 Schedule & Save

Unique User Identifier Column ?

email

→

Unique User Identifier Property ?

UserID

✓ 395 successful matches

Properties to Import (3/10 Properties available)

By default, properties are imported with their original name. You can rename properties for better readability.

☒ email ?
 → something .else

Rename Property

☐ role ?

Rename Property

☒ department ?

Rename Property

☒ joined.date ?

Rename Property

< Back

CONTINUE >

5. Click **Continue**

6. Give the new Amazon S3 Integration a name and set the desired import schedule (Incoming integrations work by pulling the CSV file from the S3 bucket according to a set synchronization interval)

New Amazon S3 Integration ×

1 Set Source ✓

2 Map Columns ✓

3 Schedule & Save

Integration Name

Schedule Import

Weekly
on
Monday
8:00 AM

< Back
SAVE

7. See the newly created integration in the integrations management table

Integrations Management Table

From this table, you can modify and delete integrations and see the following properties:

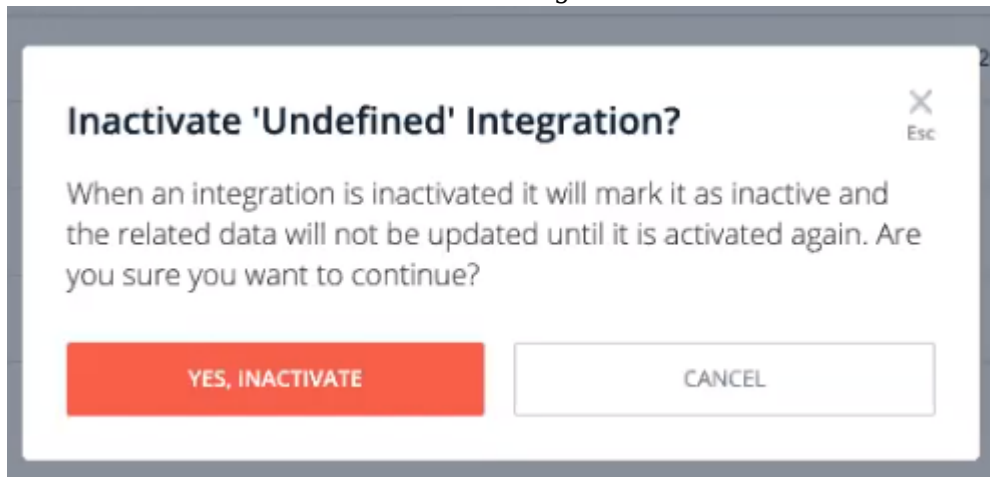
Amazon S3 Incoming Integrations (7/10 properties in use)

⚙ SOURCES
+ NEW INTEGRATION

Name	Source	Imported Properties	Scheduled	Last Run	Status
Users DB	My Bucket 1	1	Daily	9/9/2017 ✓	⏻ Inactive
Internal CRM	My Bucket 1	2	Manual	8/22/2017 ⚠	⚙ Active ✎
Support Ticketing CRM	My Bucket 1	1	Monthly	8/19/2017 ✓	⏻ Inactive
Marketing list	Walkme's Bucket	3	Daily	-	⚙ Active

- Name of integration
- Integration source
- Number of successfully imported properties

- Import schedule
- Date of the last run
- Whether the last run was successful or not (shown with a green check mark or red danger icon)
- Status toggle
 - Use this to activate or deactivate an Integration:

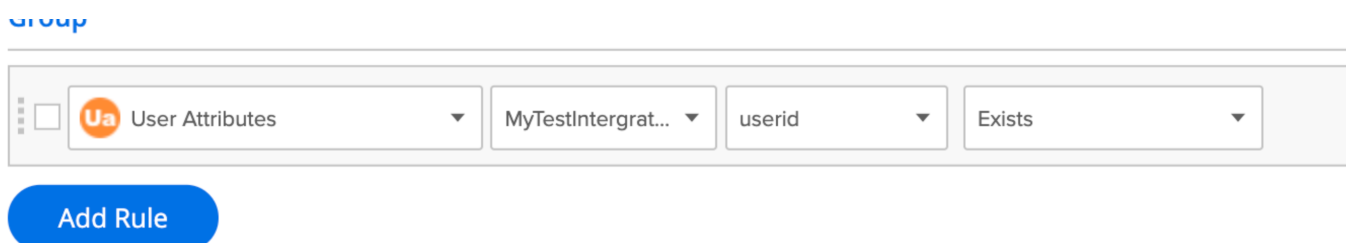


Best Practices

- When completing the integration creation process, before targeting content in the editor make sure that you have at least one successful integration run in the Incoming integration's table
- When modifying an integration, changes will be populated in the next scheduled run
 - You may need to modify/pause your segment before that
- Less is more - Be sensitive with the total number of attributes that you integrate to WalkMe
- We allow a **total of 100 attributes total** across all of the integrations

Segmenting Content According to Integration Data

After creating an S3 Integration successfully, you can use the incoming data within the WalkMe Editor to create targeted rules and segmentation for your WalkMe content:



Note



Be sure to type your attribute exactly as it was defined when creating the integration during the setup process.