Amazon S3 Outgoing Integration

Brief Overview

Connect any third-party software for additional reporting capabilities and segmented end-user experiences.

The Integration to S3 will allow you to export Insights reports to an Amazon Simple Cloud Storage (S3) bucket, on a scheduled basis. Which can then be used to connect Data Warehouse or BI tools, to further analyze systems as well as to increase the visibility of WalkMe engagement with other people within the organization.

Use Cases

- Connect to a data warehouse or BI tools to further analyze systems
- Increase the visibility of WalkMe engagement with other stakeholders in the organization

Creating the Integration

Before creating the integration make sure the following is available:

- An Amazon S3 bucket. We recommend to create one that is dedicated to your integration.
- A report is available in Insights that shows all the information you would like to export.

Step 1 – Check your Report

Before setting up the integration and the export to the S3 bucket, make sure your report is available and in the structure you need:

1. Log into Insights
2. Go to the Insights Reports tab
3. Find your report
4. Export it to your email and validate that it is indeed the report you need, if not, please contact your WalkMe representative.

Step 2 – Create your Destination Bucket

Create a destination bucket to export the report to. Notice that you can use the bucket for a few integrations and report exports, differentiating between the different reports according to path.

1. Log into Insights
2. Go to the Integration Center (Integration tab)
3. Click on "Amazon S3 Integrations"
4. Click on Destinations to view all your S3 destinations.
5. Click on "+ New destination" to create a new destination bucket
6. Fill out the form:
   - **Destination Name** – is the destination bucket name as it will be called in the Insights Integration Center. Used mainly to identify between different destination buckets.
   - **Bucket name** – the actual name of your Amazon S3 bucket, as seen in the Amazon console
   - **Optional Path** – the path in which the exported report file will be placed. If left empty, the file will be placed at the root of the bucket.
   - **Access Key and Security Key** – those are the credentials allowing WalkMe to access the bucket and place the file there.
   - **Region** – The region of your Amazon S3 bucket
7. Save the destination – WalkMe will then search for the inserted Amazon S3 bucket and display an error if one of the parameters is wrong and the bucket cannot be found.

Step 3- Create your Integration

Configure the export of your report to the Amazon S3 Destination bucket created in Step 2.

1. Log into Insights
2. Go to the Integration Center (Integration tab)
3. Click on "Amazon S3 Integrations" (if you continued from Step 2 – creating the destination bucket, just click on back to the Integrations list)
4. Click on "+ New Integration"
5. Fill out the form:
   - **Wizard Step 1:** Define the Report you want to export:
     1. Choose a report from a list. There will be a list of all the available reports that are available to you, including Custom Reports.
     2. Choose the WalkMe environment from which you would like to pull the report. There will be a list of all the WalkMe environments that are available to you.
     3. Choose a date range. They will define the time period the report will query in each execution of the export.
     4. Choose an Export Frequency, make sure you select the correct timezone:

        - Daily: An email containing the report will be sent to you every day at the hour you select;
        - Weekly: The email will be sent weekly, on the day and hour you select;
        - Monthly: The email will be sent monthly, on the day of the month and the hour you select.

   - **Wizard Step 2:** Choose a Destination

- Choose the destination defined in Step 2.
2. Click on **Save**.

Step 4- Consume your exported file

According to the set frequency, the report defined in Step 3 will be exported to the Path (or root) in the bucket defined in Step 2.

You can set up any BI tool or DataWarehouse connector to retrieve the file according to the Path defined.

To run an immediate export to the bucket, instead of just waiting for the set time, you can click on "Run Now" from the integration menu.