

Configuring WalkMe Discovery

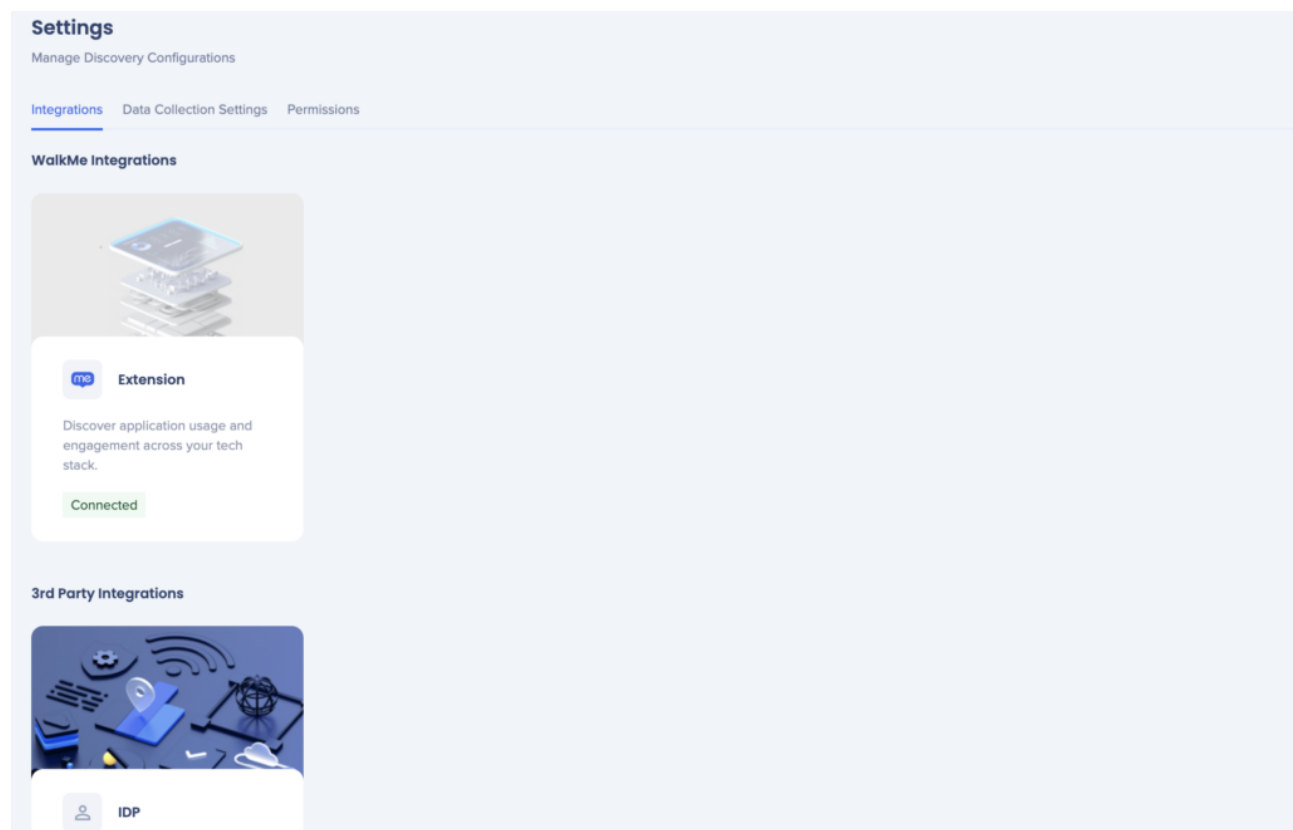
Brief Overview

Discovery is a versatile tool with several configuration options. Depending on your needs, some additional data integrations may be necessary.

Follow the guide below to ensure you are maximizing Discovery's value per your needs.

Data Collection Settings

As soon as Discovery is activated for data collection you'll have access to the Discovery settings via the WalkMe Console here: [Discovery Settings](#)



How It Works

Step One: Identifying users

Users Analyzing 762 users

Understand user activity on your entire tech stack

May 2023 Salesforce Lightning

All identified users
Analyzing 762 users

Search

Name	Email	Role	Department	Active Days	Total Time Spent	Usage Frequency	First Seen	Last Seen
Troy Mitchell	troy.mitchell@test.com	Senior Renewal Manager	Renewal	28	59.4h	Daily	a year ago	9 days ago
Ellis Kelly	ellis.kelly@test.com	Account Executive	Sales	26	10.3h	Daily	9 months ago	9 days ago
Jaslene Haynes	jaslene.haynes@test.com	Senior Business Developme...	Sales	26	12.7h	Daily	a year ago	10 days ago
Monica Austin	monica.austin@test.com	Account Executive	Sales	26	6.8h	Daily	a year ago	9 days ago
Daisy Collins	daisy.collins@test.com	Technical Support Engineer	Support	25	76.4h	Daily	a year ago	9 days ago
Jaime Herring	jaime.herring@test.com	VP, Marketing Operations	Marketing	25	10.6h	Daily	6 months ago	9 days ago
Jensen Rhodes	jensen.rhodes@test.com	SalesForce Team Manager	G&A	25	6.1h	Daily	3 months ago	9 days ago

In order to identify the users of applications you need to set the Data Collection Settings to “Identified Users”.

Settings

Manage Discovery Configurations

Integrations **Data Collection Settings** Permissions

☒ **Identified users**
Show information on individual users.
Additional information (department, role) require CSV Upload or IDP Integration.

☐ **Hashed users**
Mask information on individual users.

☒ **Departments data**
Collect and display information on your organization's departments.
Require CSV Upload or IDP Integration.

Why identify users?

By default, WalkMe hashes and de-identifies end user details (email address), but there are multiple reasons you may choose to identify your users:

- View application usage by department (or some other organizational attribute)
- View the specific users of applications and their role types
- See the application spend associated with departments
- Identify specific users that may not need their licenses

All of these provide the benefit of making smarter data-driven decisions about your digital adoptions strategy based on the people that use applications.

Am I allowed to identify the users?

Seeing users of an application is a common practice, available to specific people in your organization for typical business purposes, for example:

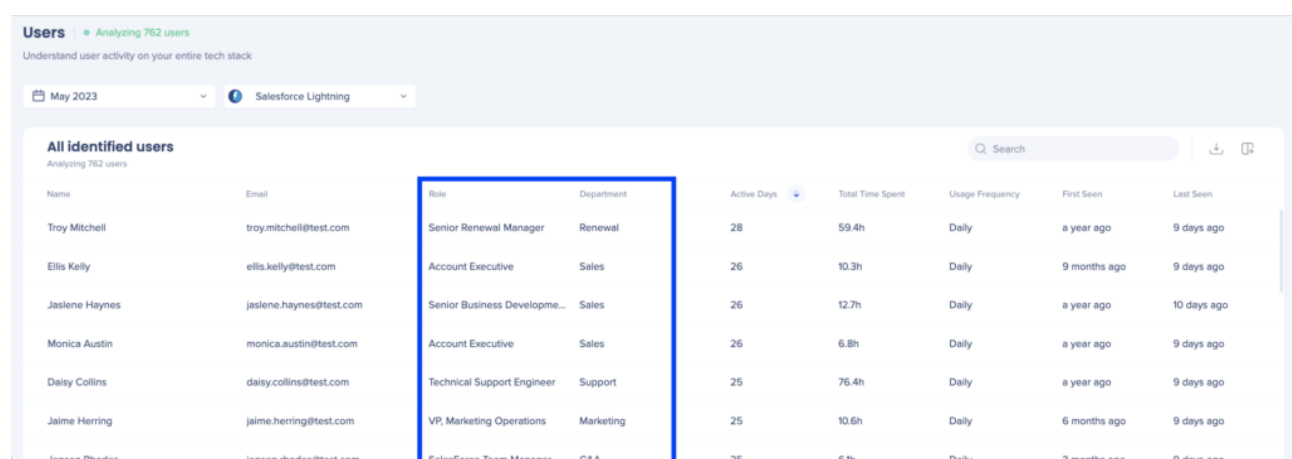
- Provisioning users in SSO / IDP like Okta or Azure
- Running reports on usage from SaaS providers like Salesforce or Confluence
- Looking at user contact info in apps like Slack or Workday

If you want to take advantage of the benefits of identifying users, but are not sure about permissions, you should review:

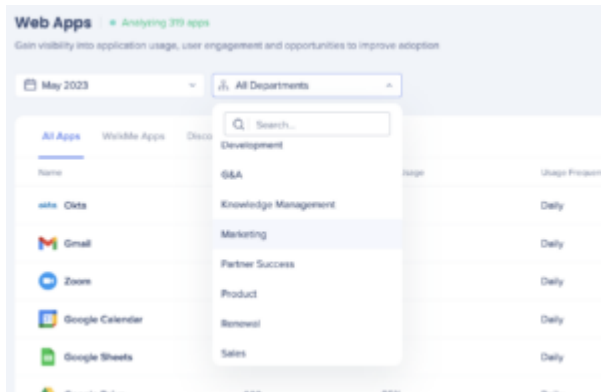
- Seeing Department and Role information for anonymous users (Settings >
- Controlling who can view user details (Settings > [Permissions](#))

PRO TIP: *The majority of Discovery customers identify their users. It benefits your company in decision making and enables your team to take actions that improve their employee experience and optimize software investments.*

Step Two: Adding 'Department' and 'Role' attributes



Name	Email	Role	Department	Active Days	Total Time Spent	Usage Frequency	First Seen	Last Seen
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Why add Department and Role attributes?

By importing data from your employee directory (Workday, SuccessFactors, etc), you can see things like

- What departments are the primary users of an app
- All the apps that are used by a population (a department, a cost center, a geo, etc)
- The role types or job titles of people using specific applications
- What departments spend the most on software

Currently the product supports one organizational attribute and one end user attribute, typically this is Department and Role Type, but you can make those attributes whatever you like.

To segment your data based on org structure and roles you have two options:

1. Import data from a directory like Workday, SuccessFactors or another employee directory
2. Use your existing WalkMe integration with IDP (Okta, Azure, etc)
 - All IDP providers supported by WalkMe in general are supported by Discovery

Note

“Identified” vs “Hashed” Data Collection setting impacts the ability to view email, name and role values in the Discovery dashboards. Department is the only independent variable because it is not considered directly part of a user’s identity.

In other words, you may operate under a “Hashed” mode, but still expose Department values. All other values will be hashed (email, name, role).

Should I do an import or use IDP?

Method	What you should know
Import a CSV	<ul style="list-style-type: none"> The data is often more actionable, for example, you can choose from several different types of departments / org attributes and roles or job titles. It's often more intuitive for how you think about the structure of your organization. Since it's a one time import, it is more of a 'snapshot' of your employee base at the time of import and will need to be updated from time to time
Use IDP integration	<ul style="list-style-type: none"> Most customer that use IDP only capture user info on a limited set of apps, so you will likely not get all of the users Often times the attributes that are integrated with IDP are limited, for example you may not have a Department field available The values in IDP attributes like Department may be very hard to take action on. Many customers have hundreds or thousands of codes for Departments that makes it more difficult to see how certain populations are using applications

Best Practices

We recommend doing an import if possible. This will give you more options for choosing how to segment.

You can use attributes other than Department and Role. Some customers choose to use:

- Department (many different types often exist)
- Business unit
- Geography
- Cost center
- Employee codes
- Management structure
- And more

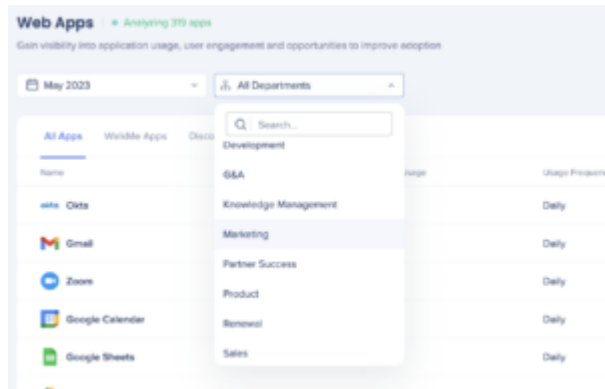
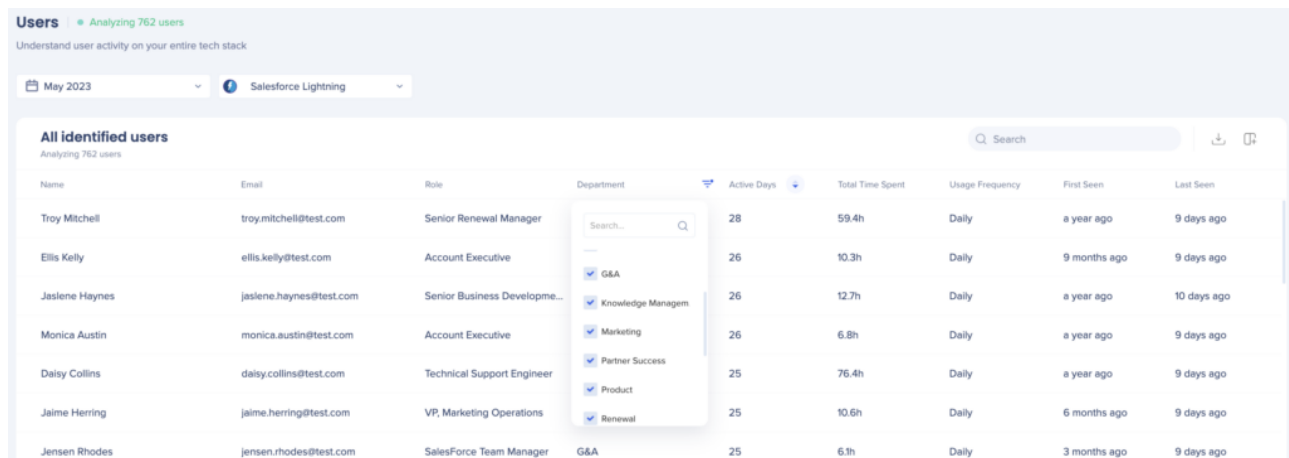
We recommend to consider a few cases of the actions you might take based on the data, and what fields you would need to use in your employee directory to categorize users.

You can access the import CSV here: [Users Details CSV Upload](#)

Name	Email	Role	Department
Troy Mitchell	troy.mitchell@test.com	Senior Renewal Manager	Renewal
Ellis Kelly	ellis.kelly@test.com	Account Executive	Sales
Jaslene Haynes	jaslene.haynes@test.com	Senior Business Development Repres	Sales
Monica Austin	monica.austin@test.com	Account Executive	Sales
Daisy Collins	daisy.collins@test.com	Technical Support Engineer	Support
Jaime Herring	jaime.herring@test.com	VP, Marketing Operations	Marketing
Jensen Rhodes	jensen.rhodes@test.com	SalesForce Team Manager	G&A
Liliana Wood	liliana.wood@test.com	Technical Support Specialist	Support
Brendan Ballard	brendan.ballard@test.com	Business Development Representativ	Sales
Cara Roman	cara.roman@test.com	Technical Support Engineer	Support
Elisa Velasquez	elisa.velasquez@test.com	Senior Digital Adoption Consultant	Services
Frankie Weber	frankie.weber@test.com	Account Sales Director	Sales
Rylee Glover	rylee.glover@test.com	Business Development Representativ	Sales
Zara Butler	zara.butler@test.com	Sales Development Representative	Sales
Easton Charles	easton.charles@test.com	Director, Business Development	Sales
Elaina Crawford	elaina.crawford@test.com	Sr. Director, Global Service Operation	CSG Operations
Fabian Wheeler	fabian.wheeler@test.com	UI/UX Designer	Services
Karl Zhang	karlie.zhang@test.com	Solution Engineer	Services

What you need to know about the CSV

- Email is required in order for us to match to the users we identify
- Department can be any attribute from your directory, allowing you to:
 - See all the applications used within that segment of the population
 - See the costs associated with those applications when you bring in license data
 - Filter application users by one or more of the segments

The screenshot shows the 'Users' section of the WalkMe interface, titled 'Analyzing 762 users'. It features a date selector set to 'May 2023' and a Salesforce Lightning icon. Below the header, there is a table of 'All identified users' with columns: Name, Email, Role, Department, Active Days, Total Time Spent, Usage Frequency, First Seen, and Last Seen. A search bar and download/export icons are at the top right of the table. The Department column has a dropdown menu open, showing a search bar and a list of departments with checkboxes: G&A, Knowledge Management, Marketing, Partner Success, Product, and Renewal.

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- Role can be any attribute from your directory, allowing you to:
 - Filter application usage by a user attribute
 - Pull in job titles, role types, manager information, geography, etc.

Users Analyzing 762 users

Understand user activity on your entire tech stack

May 2023 Salesforce Lightning

All identified users
Analyzing 762 users

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Important to consider

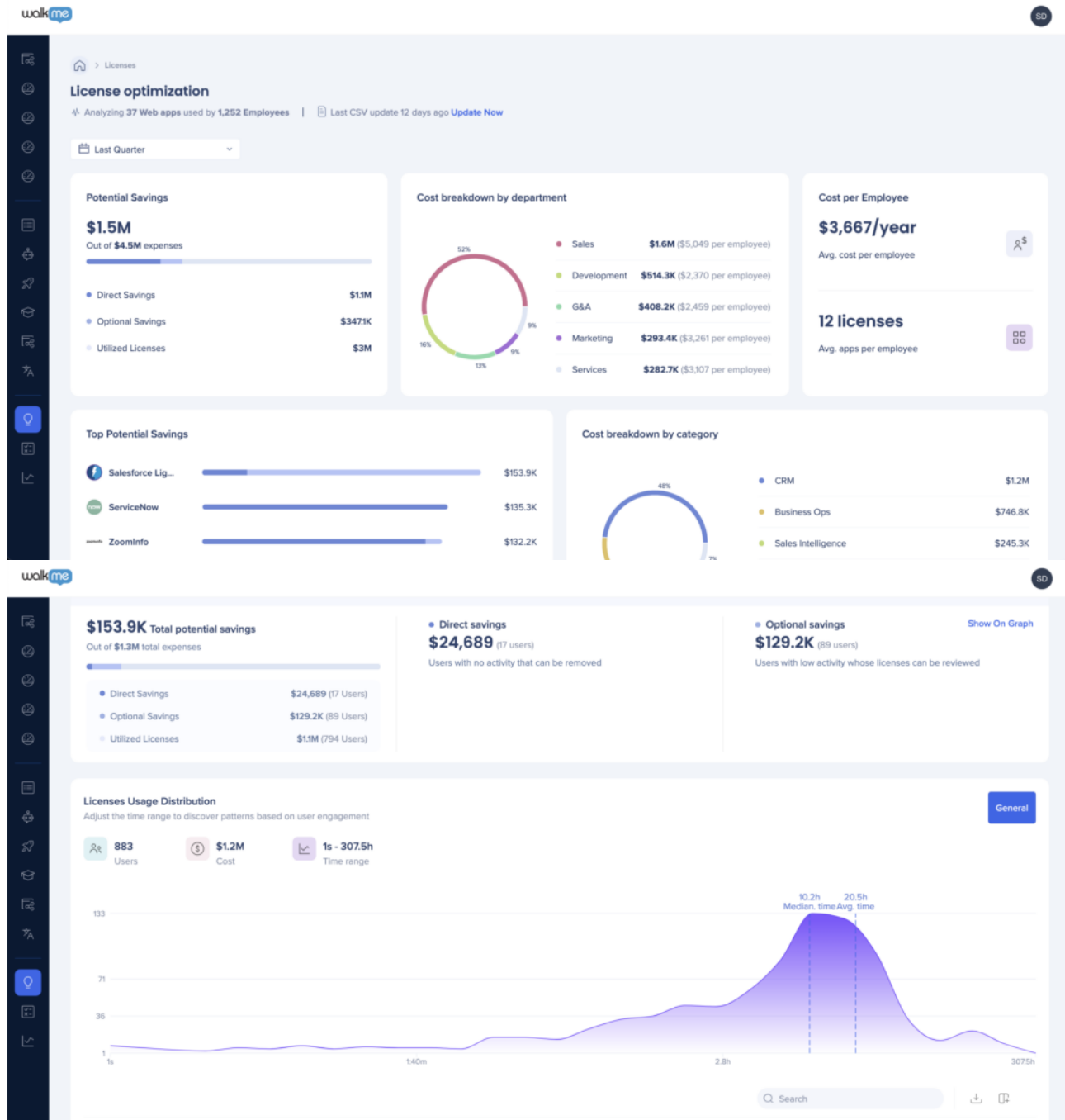
While you can choose to bring in any attribute under Department or Role,

- You can only view those attributes you import
- Changing the attributes in the future will be forward-looking, not retroactive

How do I get this data?

- Look at your employee directory and decide what attributes are of interest to you for application analysis
- Let your HR tech or IT team know why you're looking for an export from the system
- When you get an export, format it in the same way the CSV is formatted
- Any questions, contact [WalkMe support](#)

Step 3 - Adding License Information



Why add licenses information?

By inputting license amounts and costs into WalkMe Discovery, you can make software investments more efficient by:

- Realizing the value of unused or underused licenses
- Identifying areas to cut costs on specific software applications
- Consolidating tools used across different teams

- Reallocating licenses instead of buying more

It's best to share this information after the Discovery process has run for a few weeks since we assign unique app IDs to everything in your system. You can choose to track as few or as many as you'd like and keep adding licenses info over time.

Reminder

WalkMe Discovery learns from user behavior in the browser (based on WalkMe extension), we don't have any of your license information or integrate with any of your applications directly.

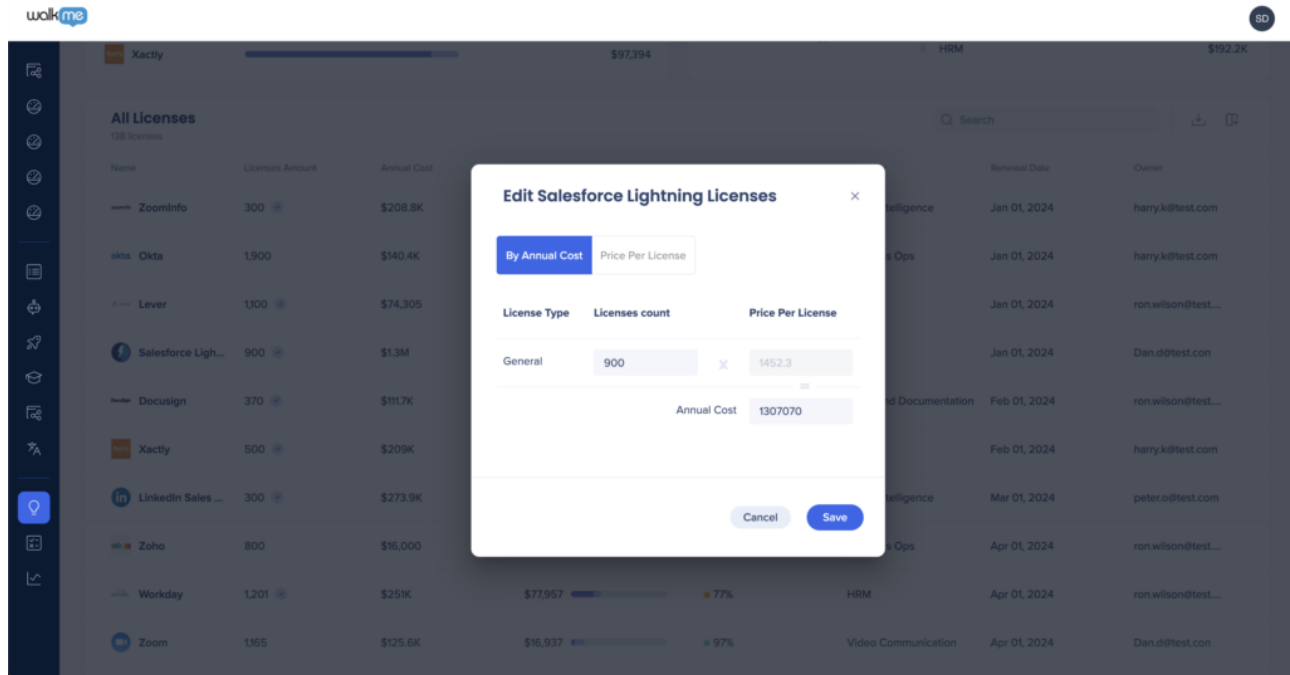
Should I input license info directly into the licenses dashboard or import a CSV?

Once Discovery has run for a few weeks, the apps identified will each have a unique ID assigned. At that point, you will be able to input license amounts and costs directly into the table on the license dashboard. You may also export a CSV with a line item for each app identified.

Note

In-app desktop application usage is not captured by the discovery process, but hybrid desktop/cloud applications that have online capabilities or require a browser action to open (like a Zoom meeting launch, or an SSO authentication) will appear.

If you already have access to license information for a few apps and want to uncover utilization and potential savings instantly, feel free to add the info directly in the table. You may edit licenses info or add license info to more apps at any time.



If you don't have licenses information available yet and want to gather information on all your apps, it may be beneficial to export the CSV and be able to share this documents offline with relevant team members. Update the CSV with license information and then re-upload the CSV into Discovery.

If the CSV is partially complete, the dashboard will show partial data. For example, you can include license amounts without costs, but you won't see costs in the dashboard. Other than that, there are fields that we use to identify the app which are not editable (app name/id).

App ID (Do not edit)	App Name (Do not edit)	License Type	Licenses Count	Yearly Price Per License (\$)	Annual Cost (\$)	Renewal Date (MM-DD-YY)	App Owner (Free text)
1111111111	Example app name	Example license type name	1500	2400	Please fill contract annual cost OR yearly price per license	01-20-25	User User
1729176736	Clari	General					
1462535840	Brainshark	Pro					
1326854754	Lever	LeverTRIM for Enterprise					
5841412520	Outreach	Standard					
5841412520	Outreach	Admin					
1598061781	Docusign	Business Pro					
1602215224	LaunchDarkly	General					
7363956970	Zendesk	Agent					
1578503654	Xactly	General					
1135654167	Pave	General					
1447643189	Webex Teams	General					
1516892678	GitLab	General					
1458715431	Tableau	Explorer					
1458715431	Tableau	Creator					
1458715431	Tableau	Viewer					








You can access the import CSV here: [Licenses CSV Upload](#)

Note

In either process, If costs are entered in non US currency values, the \$ symbol will still display.

Which apps support license type analysis?

When inputting info directly in the table or when reviewing the CSV template, you may notice some apps support license type analysis.

All Licenses	
138 licenses	
Name	Licenses Amount
 ZoomInfo	300 
 Okta	1,900
 Lever	1,100 
 Salesforce Ligh...	900 

Apps with a check mark in the UI already support license type analysis. This is based on previous research and ongoing learning. WalkMe identifies license types based on urls/actions/buttons interacted (submit, cancel, etc).

App ID (Do not edit)	App Name (Do not edit)	License Type	Licenses Count	Yearly Price Per License (\$)	Annual Cost (\$)	Renewal Date (MM-DD-YY)	App Owner (Free text)
111111111	Example app name	Example license type name	1500	2400	Please fill contract annual cost OR yearly price per license	01-20-25	User User
1729176736	Clari	General					
1462535840	Brainshark	Pro					
1326854754	Lever	LeverTRM for Enterprise					
5841412520	Outreach	Standard					
5841412520	Outreach	Admin					
1598061781	Docusign	Business Pro					
1602215224	LaunchDarkly	General					
7363956970	Zendesk	Agent					
1578503654	Xactly	General					
1135654167	Pave	General					
1447643189	Webex Teams	General					
1516892678	GitLab	General					
1458715431	Tableau	Explorer					
1458715431	Tableau	Creator					
1458715431	Tableau	Viewer					

Apps listed in the CSV also include an indication for license types.

If the app is not appearing in the UI or CSV, it is most likely because the app is homegrown. Please contact WalkMe support and include your WalkMe contact, and WalkMe R&D will add it.

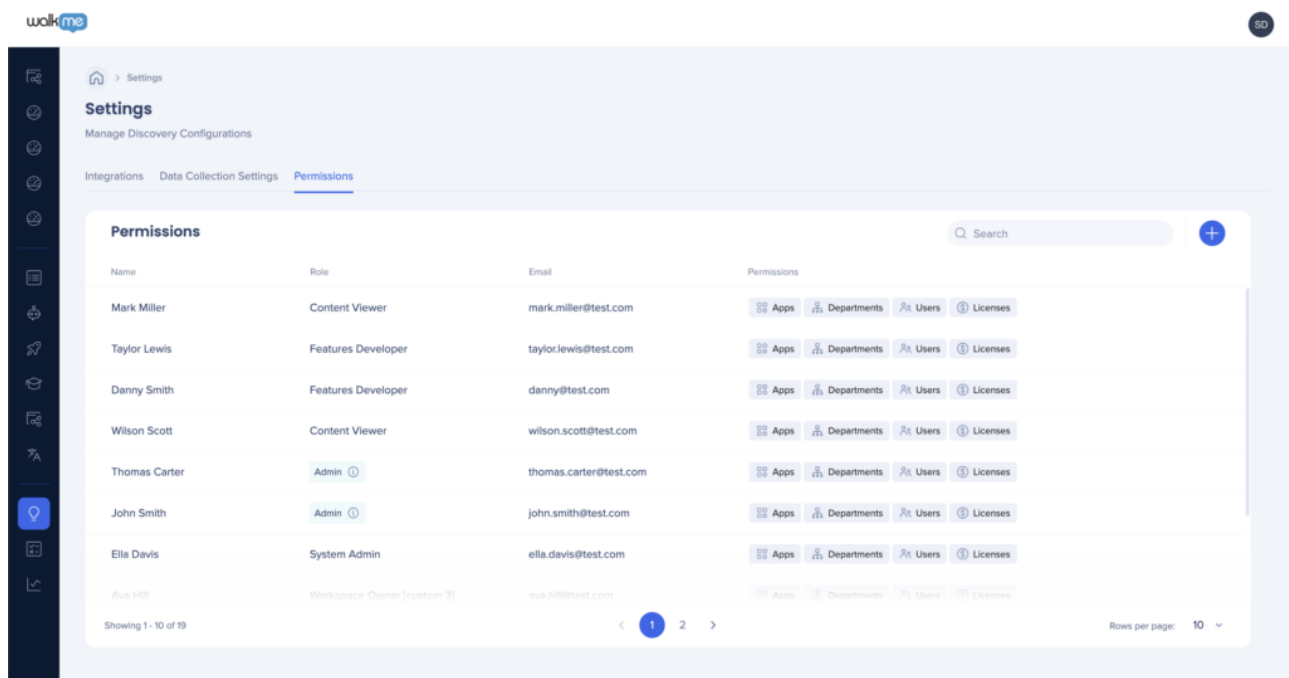
- If the app has one license type, it is supported out of the box.
- If the app has multiple license types, WalkMe will work with you on defining rules for

identifying the license types and WalkMe R&D will configure it on our end (specific URLs visited, create/edit/save buttons etc).

How do I get license amount and costs data?

- Reach out to individual app owners
- Consult your procurement or IT teams

Step 4 - Defining who has access to Discovery

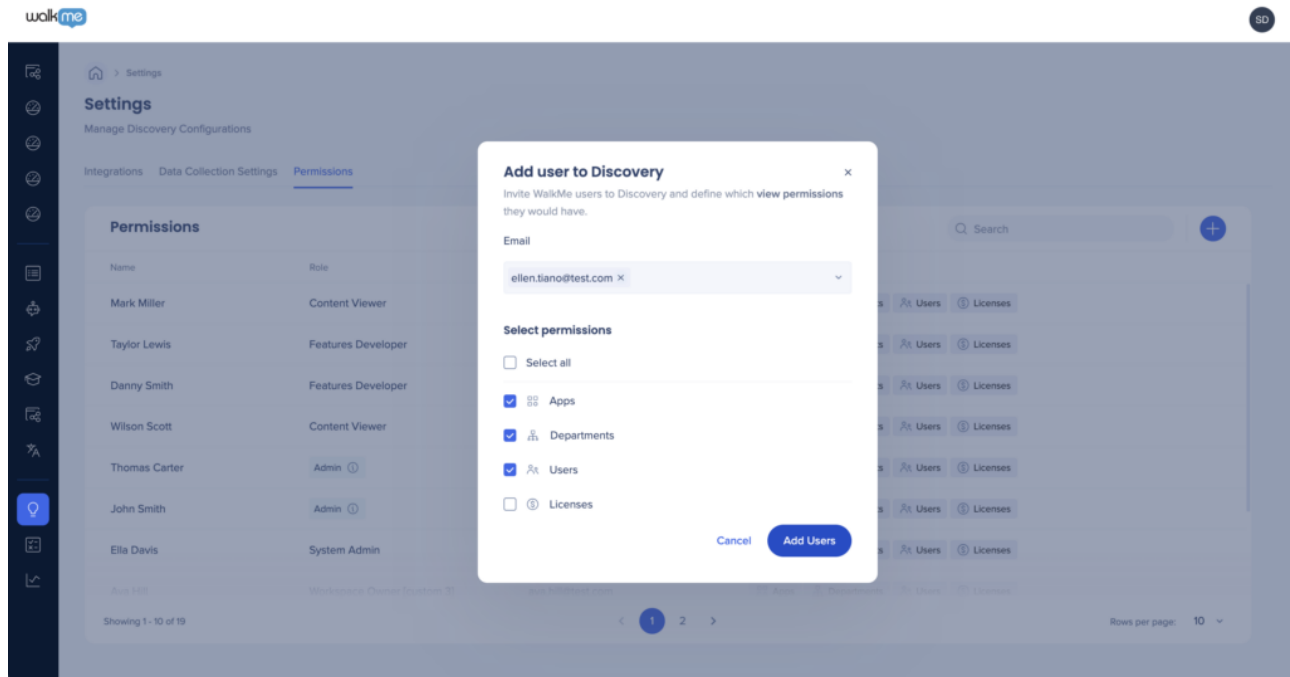


The screenshot shows the WalkMe Settings interface, specifically the 'Permissions' tab under 'Manage Discovery Configurations'. The page lists users and their roles, along with their permissions for various features.

Name	Role	Email	Permissions
Mark Miller	Content Viewer	mark.miller@test.com	Apps, Departments, Users, Licenses
Taylor Lewis	Features Developer	taylor.lewis@test.com	Apps, Departments, Users, Licenses
Danny Smith	Features Developer	danny@test.com	Apps, Departments, Users, Licenses
Wilson Scott	Content Viewer	wilson.scott@test.com	Apps, Departments, Users, Licenses
Thomas Carter	Admin	thomas.carter@test.com	Apps, Departments, Users, Licenses
John Smith	Admin	john.smith@test.com	Apps, Departments, Users, Licenses
Ella Davis	System Admin	ella.davis@test.com	Apps, Departments, Users, Licenses
Alex Hill	Workspace Owner (Custom 31)	alex.hill@test.com	Apps, Departments, Users, Licenses

Showing 1 - 10 of 19

Rows per page: 10



Why define permissions for Discovery?

In order for anyone to see the data, there needs to be at least one designated admin assigned. That person must invite other users with varying levels of permissions.

By default, all admins defined in the admin center are admins in Discovery.

Note

Only users already registered in the admin center are eligible to be invited to Discovery.

Which permission levels are available?

Define dashboard-level access per WalkMe user:

- Apps
- Departments
- Users
- Licenses

You can define permissions and access here: [Discovery Permissions](#)

Summary – Action Items

While Discovery collects and aggregates your data, it's best to be proactive and:

1. Verify data collection settings – Identified vs Hashed, Departments
2. Generate employee details CSV
3. Gather licenses amounts and costs
4. Define user permissions for Discovery