

Incoming CSV Integration

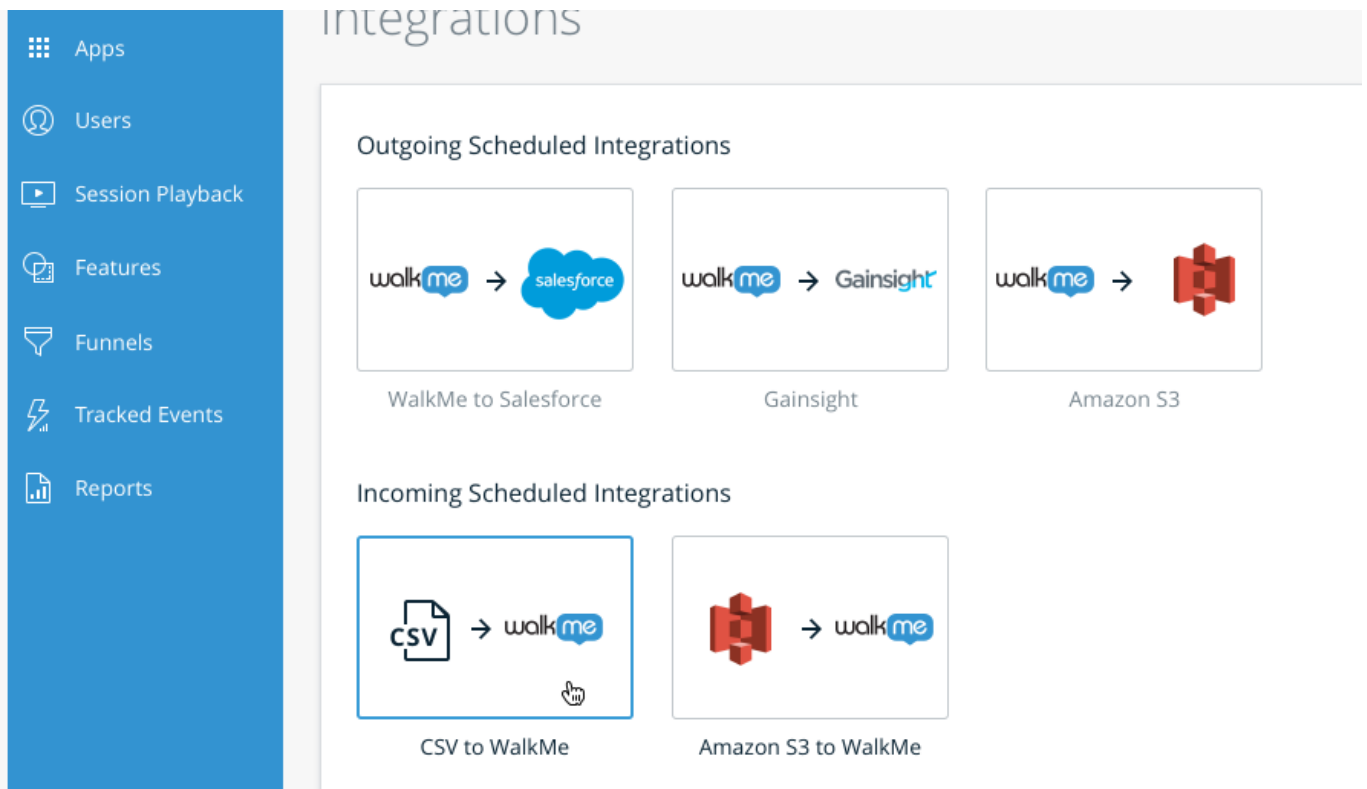
Brief Overview

Upload CSV for incoming integration can connect any third party software that allows exporting data to a CSV file to WalkMe. The integration pulls attributes, sync, and populate into WalkMe for content segmentation.

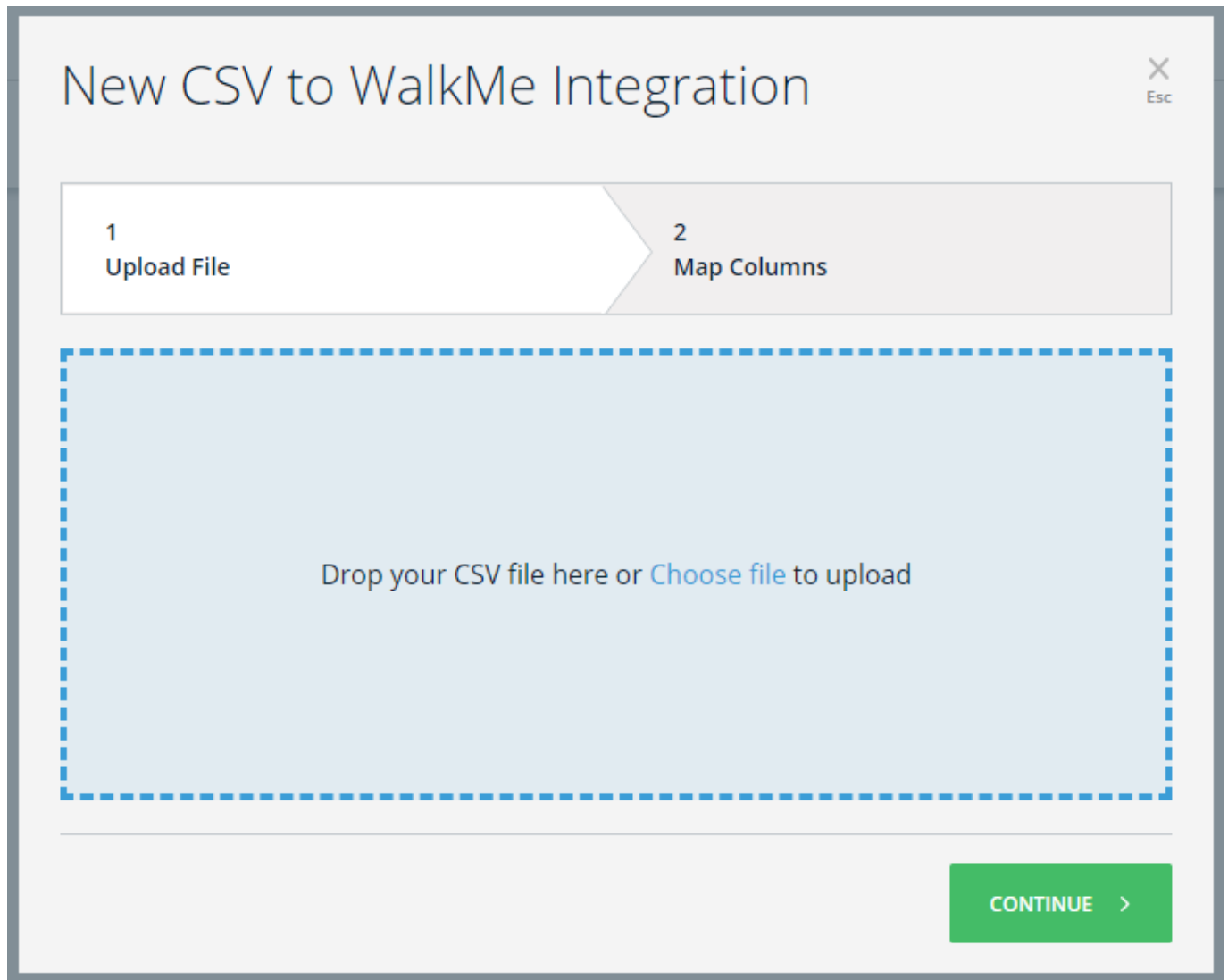
Creating an incoming integration

The integrations setup is under "Integrations" tab on Insights.

1. Select CSV to WalkMe



2. Follow the wizard instructions to upload your CSV file to Walkme.



3. After data discovery, map the user identifier and select the wanted columns (i.e. attributes)

Note: A prerequisite for using the integration is setting up Unique User Id in WalkMe's editor.

New CSV to WalkMe Integration ✕ Esc

1
Upload File ✓

2
Map Columns

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

Unique User Identifier Column ? Unique User Identifier Property ?

Select column to identify users by ▼ 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 (28/30) Properties available
By default, properties are imported with their original name. You can rename properties for better readability.

<input checked="" type="checkbox"/>	id	i	Rename property
<input type="checkbox"/>	first_name	i	Rename property
<input type="checkbox"/>	last_name	i	Rename property
<input checked="" type="checkbox"/>	language	i	Rename property

< BACK SAVE

4. After #3, the system will prompt a success/failure. Follow the instructions to resolve.

New CSV to WalkMe Integration

1 Upload File 2 Map Columns

Unique User Identifier Column ? Unique User Identifier Property ?

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

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<input type="checkbox"/>	last_name	?	Rename property
<input checked="" type="checkbox"/>	language	?	→ <input type="text" value="Lang"/>

[< BACK](#) [SAVE](#)

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

Modifying/Deleting the integrations can be done from this table.

< INTEGRATIONS

CSV Incoming Integrations + NEW INTEGRATION

Id ▾	Name	Imported Properties	Uploaded
9493	test_demo.csv	4	08/09/2019 ✓
9494	test_demo_min.csv	2	08/09/2019 ✓

Segmentation Based on Incoming Integration Fields

Once the Integration is set up - Perform an empty publish so you can segment based on the imported fields in your Editor.

Once Publish is performed in your segmentation rule engine: Choose User Attributes in the first Drop Down and in the second Drop Down Choose the Name of your 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" under Incoming integrations table (see above #5).
- When modifying an integration, changes will be updated immediately.
- Less is more - Be sensitive to the total number of attributes that you integrate to WalkMe. We allow a total of 100 attributes total across all of the integrations.
- After a successful integration, you may need to close and reopen the Editor in order to see the updated fields in the segmentation editor.