About Insights Engaged Elements

Brief Overview

Engaged Elements are an Insights feature that allow you to understand how your users behave in the underlying web application, even if you prefer not to use Digital Experience Analytics (DXA) due to security concerns. Engaged Elements will help understand your users interactions regardless of whether you take advantage of WalkMe's different features. This type of analytics will help you better understand your users pain points in order to make better implementation decisions.

How It Works

An element is captured and defined as an **Engaged Element** in the Editor. These elements will then be automatically shown in Insights as Tracked Events and can be analyzed in Insights just as any other Tracked Event.

To learn more about Tracked Events, please refer to the *About Insights Tracked Events* article.

## Supported Web Applications

The following web applications currently support the use of Insights Engaged Elements:

1. SuccessFactors
2. Workday®
3. Salesforce Classic
4. Salesforce Lightning
5. Microsoft Dynamics
6. Any Editor system using our upgraded Element Recognition version (DeepUI)

How to Create an Engaged Element
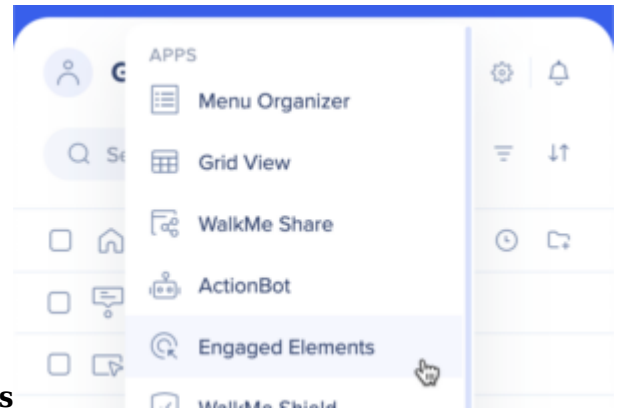
1. In the **Editor** go to **Apps → Engaged Elements**
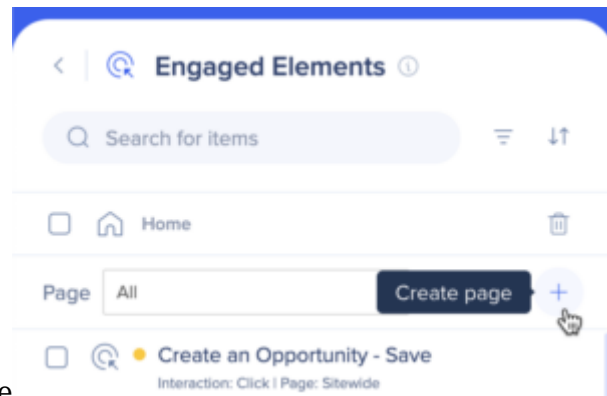
2. Click on the **+** icon to create a new page
3. Capture the element you wish to track
4. Give the Engaged Element a name
5. Specify the interaction type you wish to track:
   - **Click**: Will be triggered each time a user clicks on the defined Engaged Element
   - **Input**: Will be triggered each time a user changes an input
     - For example, in a text field, the input event will be triggered once a user changes the text input and focuses out of the defined Engaged Element field
   - **Hover**: Will be triggered each time a user hovers for more than 300 ms on the defined Engaged Element
   - **Visible**: Will be triggered each time the defined Engaged Element is apparent on every page load or URL change – If the event is removed and then visible again, the event will be triggered again
6. Click **Save**
7. Publish to the relevant environment

How to Use All Site Pages (Sitewide)

When selecting an element that is placed on a component of the site that is common to all pages, such as a header, footer, or sidebar navigation, make sure to specify to track the element **Sitewide** to cover all pages where it appears.

This means selecting **All Site Pages (Sitewide)** from the dropdown before capturing the Engaged Element.
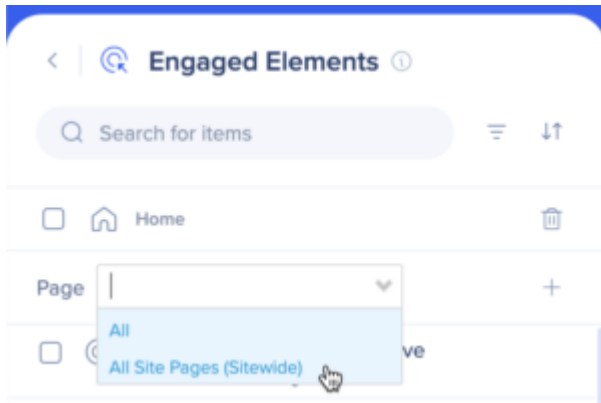
Best Practices

1. For best performance try to reduce the number of Engaged Elements in the **All site** category
2. You can create an additional page that answers a specific regex in the application, like so:

    1. Open the settings for the Engaged Element
    2. In the **Interaction** tab, click **open the page's settings**

    3. Click **Edit Rules**

4. Click **Save**

Tip: Use **Like** in combination with asterisk signs (*) to define a more dynamic URL

Setting Pages

It is best practice to set a specific page or section of the application that defines the "context" of the element.

This page will be the location the element will be tracked in. When you have similar elements in several pages and you wish to get data for a specific page only, make sure you create the Engaged Element only for that certain page.

For example, a **Save** button for a **New Opportunity** page should be set to track on the opportunity page only. It will eventually filter the clicks tracked for this button to these occurred on this page only.

How to Identify the Page

Each supported web application has its own best practices to define a page or a section of the application that defines the "context" of the element such as "**Form**" or a specific menu.

For example, in Workday® **Worklets** are a common way to identify the location of the element.

Analyzing Engaged Elements in Insights

Once an Engaged Element is saved, it is available in Insights as an **Engaged Element** type of Tracked Event. These Tracked Events can be used just as any other Tracked Event to create Funnels, which can then be analyzed in the Tracked Events Dashboard, or even used to filter sessions.

Keep in mind that **only published Engaged Elements will collect data**.

Engaged Elements that are in draft, modified, or archived will still show in Insights with the relevant notification and deleted Engaged Elements will not be shown.

Limitations

Engaged Elements are currently not available when using:

1. Version history
2. On-Premise
3. Targeting an element within a cross domain iFrame (for example, in Salesforce Lightning) does not yield interaction data due to the page settings only targeting the top frame

The number of Engaged Elements is limited to **20 per page** to ensure optimal site performance results.

- Multiple Engaged Elements cannot be set up for the exact same element

Data Latency

- Any change to Engaged Elements in the Editor (creation, modification, or publish state change) might take up to 30 minutes to sync in Insights

Supported Rule Types

1. URL
2. On-Screen Element
3. jQuery Element
4. Workday® (if Workday® plugin is installed)

5. Salesforce (for sfVars)
6. Segments reuse

By design, only certain rule types are allowed for defining a page to ensure rules are used to define a location (where to search for the element). Who? When? type of rules to define users or time are not supported.

PII

- No PII is collected from the element attributes like in DXA
- The risk for PII collection is the same as in WalkMe Engagement
- Please be aware that PII can still be apparent in URLs, page titles, end user identifiers, or analytics properties
- If this is a concern, please see *Insights: Prevent Collecting PII Using Insights Privacy Settings*
- To understand the differences between Engaged Elements and DXA, please see the *Engaged Elements vs. DXA paper*