

Creating General Tracked Events in Insights

Brief Overview

This article explains how to create a Tracked Event to track user engagement with your website or application.

To learn more about what Tracked Events are, please refer to the following article: [About Insights Tracked Events](#).

How It Works

Tracked Events Setup page

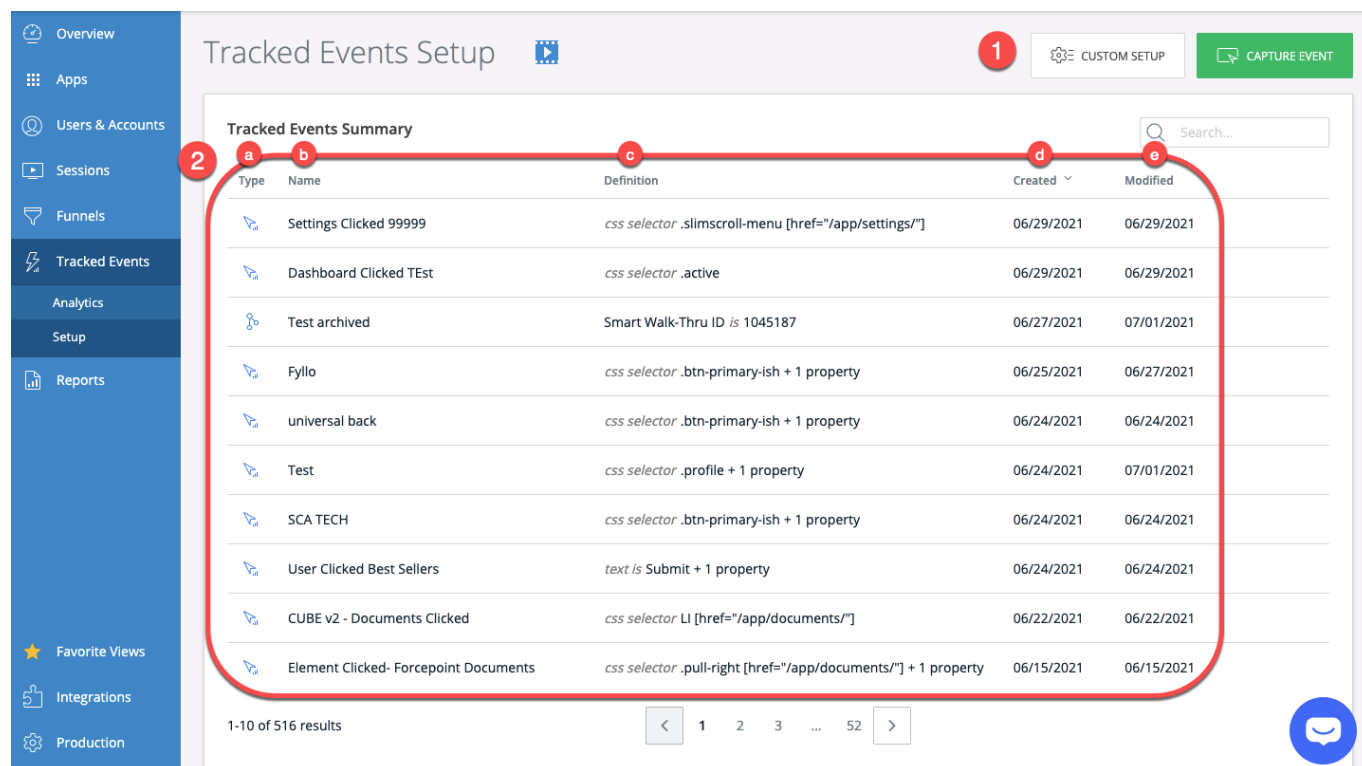
To create a Tracked Event, you must go to the **Tracked Events Setup** page in [Insights](#), accessible at insights.walkme.com.

Make sure that you have the correct system open.

Tip

To learn more about navigating Insights, please refer to the following article:

- [Insights: Getting Started Guide](#)



1. + NEW EVENT

- **CUSTOM SETUP** button
- **CAPTURE EVENT** button

2. Tracked Events Summary Table

1. **Type:** Each event has a different icon that corresponds to its type
2. **Name:** This is the name the event's creator gave to the Tracked Event
3. **Definition:** This is the criterion that must be met before the Tracked Event is considered to have occurred
4. **Created:** This is the date the Tracked Event was created
5. **Modified:** This is the date the Tracked Event was last modified

Creating a Tracked Event

□ Digital Adoption Institute

- View the [Analyzing a Digital Adoption Project with WalkMe Analytics](#) course in the DAI
- Don't have a DAI account yet? [Sign up here](#)

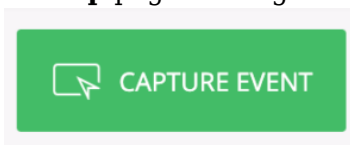
Method 1 - Capture Event

Prerequisites

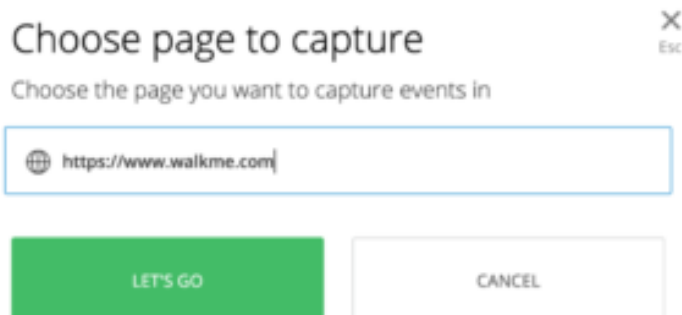
- The WalkMe Editor Extension and Editor app are installed
- You are logged into the WalkMe Editor with your Insights user account
- A settings publish was performed

Instructions

1. Go to the **Tracked Events Setup** page in Insights



2. Click **CAPTURE EVENT**
 - **Note:** If the “Capture Event” button is greyed out, this means that DXA is not yet enabled on the account. Please reach out to your Admin to have the setting turned on so you can begin using this feature. Refer to this article for more information: [Insights Digital Experience Analytics \(DXA\) Level](#)
3. Enter the URL of the page where you want to capture the element and click **LET’S GO**



4. Capture the target element
5. Review the data provided about the captured element and make changes to the settings if needed
 - **Note:** You will see a message indicating whether or not data already exists matching the

definition

6. Click **DONE**

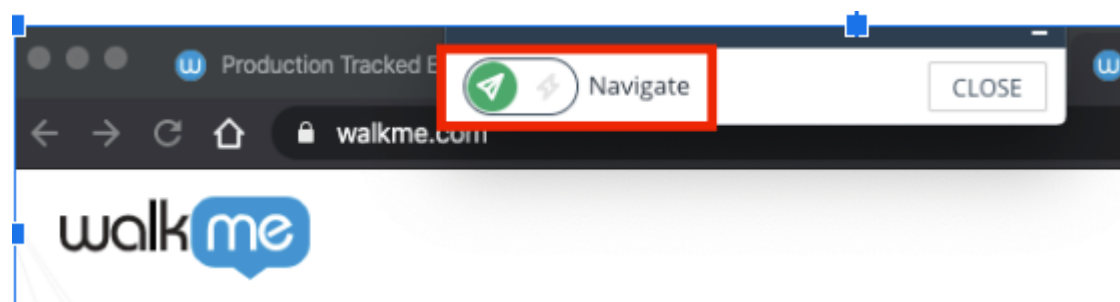
You will be automatically redirected to Insights, where you will see your new Tracked Event.

Limitations to Capture Event method

Switching the Editor to Mobile Web for capturing tracked events isn't supported.

To capture tracked events for Mobile Web, switch the browser to Mobile mode using Dev Tools without switching to Mobile Web in the Editor. Here's how to do it:

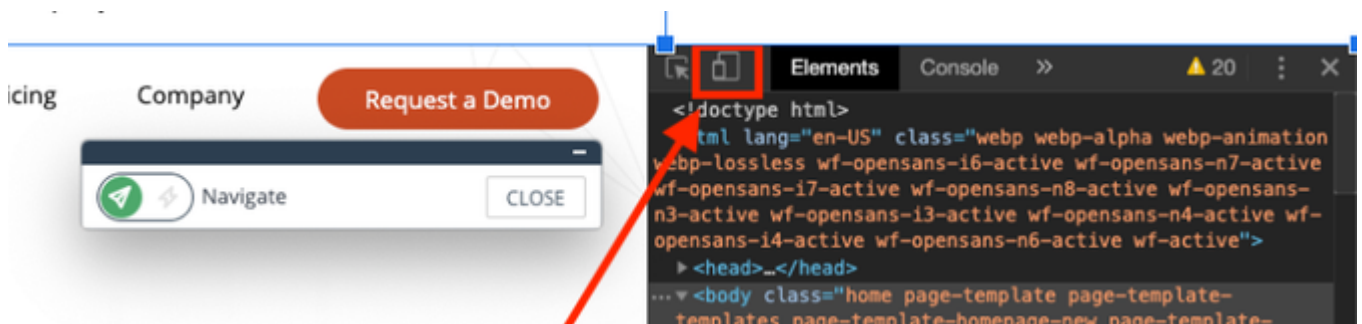
1. Switch from the Select Element mode to Navigate



2. Switch back to Select Element mode and capture the target element



3. Open the browser's dev tools by pressing on F12 and switch the browser's layout display to Mobile



Method 2 - Custom Setup

You can manually create a Tracked Event by clicking **CUSTOM SETUP**.



1. Enter a name for your Tracked Event
 - **Tip:** Use a naming convention that indicates the user action the Event represents
2. Select a definition from the drop down menu
 - [See Available Event Types](#)
3. Select any desired properties to help define the Event
 - [See Available Event Types](#)
4. Click + **ADD PROPERTY** under the Event Properties section
 - **Optional:** Only available for click or input-type events
5. Click **SAVE**

The new Tracked Event will be available to use in funnels and filters.

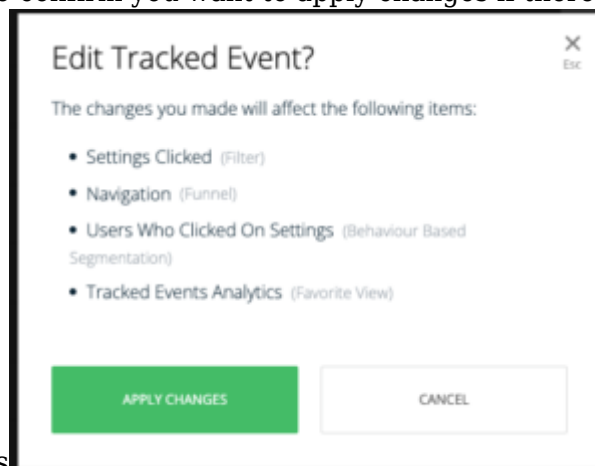
Tip

If you are unable to create a Tracked Event on an iFrame, your Editor may require special configuration. Please reach out to your Customer Success Manager or WalkMe contact for more information.

Editing a Tracked Event









When you hover over a Tracked Event you will see the following options:

- **Copy button:** Duplicate and create a new, similar Tracked Event
- **Trash icon:** Delete a Tracked Event
- **Pencil icon:** Edit an existing Tracked Event
 - You will be prompted to confirm you want to apply changes if there are items that will be



affected by the changes

- **Recapture Tracked Event button:** Edit the Tracked Event by recapturing the target element

Tracked Events Setup					CUSTOM SETUP	CAPTURE EVENT
Tracked Events Summary					Search...	
Type	Name	Definition	Created	Modified		
	New Files Clicked	css selector .ui-droppable	12/15/2021	12/15/2021	   	
	Notifications Clicked	css selector DIV [href="/app/notifications/"]	12/07/2021	12/07/2021		
	profile item	css selector .profile	12/06/2021	12/06/2021		
	Signature Clicked - LL	css selector .settings-menu LI	12/06/2021	12/06/2021		

Available Event Types

Event Type	Brief Description	In-Depth Definition
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Click/Tap	Filter by an element that is clicked or tapped	<p>Elements can be identified using the following:</p> <p>Text is: Identify the clicked element by its content.</p> <p>id: Identify the clicked element by its unique element identifier.</p> <p>class: Identify the clicked element by one or more classes.</p> <p>For more precise results use spaces to also identify a parent element's class.</p> <p>For example, ".shippingForm .saveBtn "</p> <p>CSS selector - read more below</p>
Page View	Filter by a specific URL a user visits	
Input	Filter by input fields a user interacts with	<p>Input fields can be identified using the following:</p> <p>Name is: Identify the input element by the input field name</p> <p>label is: Identify the element by the input field name</p> <p>Class: Identify the input element by one or more classes.</p> <p>Id: Identify the input element by its unique element identifier.</p> <p>CSS selector - read more below</p>

Creating Event Properties

For certain types of Tracked Events (e.g., click/tap and input-type events), you can add event properties. Event properties record what URL the user is on when the event in question occurs (excluding the Page View event type, which already filters events by what URL the user is on).

CLOSE X

New Tracked Event

User Checks Out ?

Definition ?

Click/Tap ?

CSS selector▼

.button#place_order

OR

🗑️

Event Properties optional ?

🌐 URL

Full URL ▼

http://shopme.walkme.com/checkout/

OR

🗑️

+ ADD PROPERTY

For example, imagine you’ve created a new Tracked Event called “User Completed Purchase,” and you’ve defined the event as occurring when a user clicks the *Place Order* button with the HTML ID attribute of “place_order,” which is available on multiple pages.

You can now add an event property that checks whether the page on which the event occurred contains a particular URL, e.g.: “http://shopme.walkme.com/checkout.”

This way the Tracked Events will only count clicks occurring on this element on this specific page only. Otherwise, clicks from all pages would be counted toward the Tracked Event.

Pro-Tip!

Use the Asterix symbol (*) as a “wild card” for example:
https://support.walkme.com/knowledge-base/*/

CSS Selectors

CSS selector allows a precise definition of an element to be tracked. CSS selectors allow you to identify elements in the HTML structure based on their characteristics such as id, class, type, attributes, or values of attributes.

Note:

It is recommended to have a basic understanding of writing and using CSS before using it to define your Tracked Events in WalkMe.

How to Use/Build/Create CSS

- Find the element in the HTML by right-clicking on the element and selecting Inspect Element. The element will be highlighted on the screen and in the developer panel. Identify the element's unique characteristics (such as location, class, id, and additional attributes) in order to build your CSS selector.
- Once identified, build your CSS selector. Currently, this is the supported CSS subset:

Supported CSS Attributes		Syntax
Id	The hash selector is used to specifically define an element based on its id attribute	#IdName
Class	The dot is used to specifically define an element based on its class attribute	.className
Additional attributes [attribute='value']	tagName, src, href, type, name, Role, Text	Equals: [attribute=a] Contains: [attribute*=b] Begins with: [attribute^=a] Ends with: [attribute\$=c]
	The attribute selector is used to specifically define an element based on any of its HTML attributes. By default class and Id attributes are being collected. In order to collect additional HTML attributes, "this should be enabled in the environment settings → collection enablement section.	
Tag name		Name
Space - Elements hierarchy	The space is used to define hierarchy between elements. '.className .className'	
Combination of the above	#idName. className. className	example: #idName. className. className

Testing Your CSS Selector

- When [defining a Tracked Event](#), Insights will immediately generate a preview of the results from the past 30 days until **now**, meaning it gets updated by the minute. This allows you to understand if any events have already been captured for this definition.

- To verify you identified the correct event as a Tracked Event, you should review the past months' usage for this definition. If you receive zeros as your results, something in the definition might be faulty.
- You can also simulate the event on your website and verify it was tracked in real-time.
- When Sessions Playback is enabled, you can simply watch a session that the event appears in.

Character Limit

Classes that contain more than 35 characters and IDs that contain more than 40 characters will not be collected so should not be used to define tracked events.

Tip Tuesday Videos

WalkMe Insight Events to Analyze Content Effectiveness





To see more Tip Tuesday videos on WalkMe World [click here](#).