Insights – The WalkMe Analytics Experience

WalkMe Analytics – Insights

[WalkMe Insights](#) is WalkMe's all-in-one analytics platform, providing core analytics for all WalkMe items and general user behavior in your product. With its built-in features, including Funnels and Session Playback, Insights gives you the following benefits and more:

- Provides real-time analytics
- Lets you keep track of your end-users' engagement with both your WalkMe solution and your underlying website
- Lets you view accurate re-creations of your end-users' in-app sessions

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- Don't have a DAI account yet? [Sign up here](#)

Insights Reports

The [Insights Reports](#) page is your home base for reviewing, exporting, and subscribing to your Insights common and custom reports. If you subscribe to a report, a scheduled email will be sent to a recipient list of your choosing.

Use Cases

- Analyze your insights in a more raw data format or with external tools
- Share reports with more people, including those who are not Insights users
- Schedule and receive periodic updates about the progress of your KPIs without needing to actively search and filter in Insights

Note: Please make sure to review the default reports available in Insights. You can reach out to your Customer Success Manager or WalkMe contact if custom reports are needed.

Digital Experience Analytics (DXA) (previously known as UBT)

Digital Experience Analytics (DXA) is a data collection level that can be enabled in Insights. With DXA, Insights captures every interaction your users have with HTML elements on your website.

This includes the following:

- Clicks
- Page views
- Input changes
- Key presses
- Form submissions
- Element selections

Insights will send this information to the WalkMe servers. This allows you to customize your usage of the various Insights tools and dashboards.

Note: Once Digital Experience Analytics (DXA) has been enabled for your account, you will receive unlimited user behavior analytics. Data will be available in Insights for the past year.

Session Playback

Session Playback is a level of data Collection that can be enabled in Insights. With Session Playback enabled, Insights captures everything occurring in the Document Object Model (DOM), saves copies of all assets, and sends this information to the WalkMe servers. This allows you to view accurate re-creations of user sessions, both those that occurred in the past, and those that are occurring in real-time.

Once Session Playback has been enabled for your account, you will receive 1,000 session Session Playbacks by default. Sessions collected over the playback limit will still be available for event-reporting and analytics, just not for Session Playback. You can reach out to your WalkMe contact to purchase additional sessions.

Note: Session Playback data will be available in Insights for the past year.

Privacy

Since WalkMe Insights collects data that might include sensitive information, WalkMe has taken extensive measures to filter the data collected and to then transfer, store and access the recorded sessions using enterprise-level security methods, including but not limited to the following points:

- On-the-fly data filtering to avoid recording sensitive and potentially compromising information configured via censorship settings.
- Insights use SSL (SHA-256 with RSA Encryption) to record when the visitor's browser is using HTTPS to access your web application (please see important note below).

Maintaining Privacy:

- Keystrokes and Input: Insights' default setting ensures it does not record any keystrokes on any input. This can be changed, though this is generally not recommended.
- Passwords: Insights never records password inputs.
- Censorship Settings: Session Playback allows specifying specific elements that will be completely censored, and thus omitted from the recording. Censoring can be done based on HTML ID attributes and Class names.

Data Integrations

WalkMe Insights collects meaningful data on how your end-users interact with your software, but the potential of this information is wasted if it's only available to a handful of people. WalkMe's Integration Center allows all of your teams to use WalkMe to make data-driven decisions that improve your business outcomes.

Data from Insights is pushed into a report based on your exact specifications. Then, using a simple wizard, you can map this data directly into fields in your system.

WalkMe to Salesforce Integration

Using the Data Integration Center, data from WalkMe Insights is accessible in Salesforce and can be used in workflows, reports, and activities. This data is synced every 24 hours at 8:00 am UTC.

How does it work?
Using the Salesforce integration, you can push WalkMe Insights data into Salesforce objects to enhance your understanding of end-user behavior.
During the setup process, you'll choose the Salesforce object to push the data into and which data you want to be pushed into Salesforce according to an Insights custom report.

If a match is found between the custom report's unique identifier (usually email or GUI) and the Salesforce object's unique identifier (usually email), then you can push the data found in the insights report to this object.

- You can sync any Salesforce object
- You can sync to both Salesforce environments: Sandbox and Production

Authentication Method
We use the Salesforce OAuth 2.0 authorization method to obtain a token (that we store) for the end-user. This access can be revoked at any time by the Salesforce Admin or within the system by disconnecting the account.
Requirements

- You must be a Salesforce admin or contact your Salesforce admin in order to add custom fields to your targeted Salesforce object(s)
- You must have a Salesforce user that either has Salesforce admin access or ModifyAllData permissions to grant WalkMe access to OAuth 2.0 authorization to read and update the metadata of Salesforce objects (this access can be revoked by the Salesforce Admin at any time).

WalkMe to Gainsight Integration

Using the Data Integration Center, data from WalkMe Insights can be pushed into Gainsight and can be used in workflows, reports, and activities. This data is synced every 24 hours at 8:00 am UTC.

How does it work?
Gainsight integration is based on Salesforce integration. Using the Salesforce integration, you can push Insights data into Salesforce objects that Gainsight can then use to enhance your understanding of end-user behavior.

During the setup process, you'll choose the Salesforce object to push the data into and which data you want to be pushed into Salesforce according to an Insights custom report.

If a match is found between the custom report's unique identifier (usually email or GUI) and the Salesforce object's unique identifier (usually email), then you can push the data found in the insights report to this object.

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More information regarding WalkMe's Gainsight integration can be found in [this Support article.](#)

IDP Integration

[IDP Integration](#) can be used to validate end-users identity, enrich content segmentation capabilities, and expand on user behavior monitoring. Providing one reliable and secure User ID across any system without the need of defining the unique user ID for each system with different variables.

IDP Integration is currently supported on Okta and G-Suite systems.
End-User Flow:

Outgoing S3 Integration

The [Outgoing 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.

Before creating the integration make sure the following is available:

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

You can set up most BI tools or DataWarehouse connector to retrieve the file according to the Path defined, as long as these can integrate with the S3 bucket.

Incoming S3 Integration

[S3 Incoming Integration](#) can connect any third-party software, on top of S3, to WalkMe. The

integration pulls attributes and populates data into WalkMe to use data from external systems in WalkMe for analytics and content segmentation.

Use Cases

Target WalkMe content based on CRM attributes:

- Display a shoutout only to "premium users" on your site.
- Show a Smart Walk-Thru internally to employees that are from a specific department.

Target WalkMe content based on Customer Support / Success (such as ServiceNow, Zendesk) attributes:

- Show an NPS survey to all customers that opened more than 2 support tickets.

Webhooks

[Webhooks](#) (AKA callbacks) allow you to build WalkMe directly into your workflows by triggering 3rd party APIs and/or adding WalkMe Event data into your analytics platform.

API integrations are done at regular intervals because they are often resource-intensive and capped by 3rd party tools. While this may be fine for updating large data sets, time-sensitive data may be delayed and even outdated by the time it's delivered.

Webhooks deliver real-time WalkMe Event information to your system of choice, triggered by the event itself. This means you receive information with no delay, so your teams can take immediate action informed by time-sensitive information.

Webhooks securely transfer data using server-to-server calls, with no development work required. WalkMe webhooks support any HTTP calls in GET or POST methods. The payload must be in JSON.

Use Cases

- Webhook use cases include the following:
- Add real-time WalkMe Events to your Analytics/BI tool;
  - Trigger 3rd party APIs based on WalkMe Events. Examples include the following:
  - Get immediate Slack notifications when a Walk-Thru Goal is reached;
  - Add an end-user to a marketing list when they click a promotional ShoutOut;
  - Create a Zendesk ticket when an end-user submits a WalkMe Survey requesting extra help;
  - Add end-users to a spreadsheet to track onboarding when they complete onboarding tasks
  - Receive an email when end-users complete a WalkMe NPS Survey

More information on how to configure Webhooks can be found in our [Support article](#).