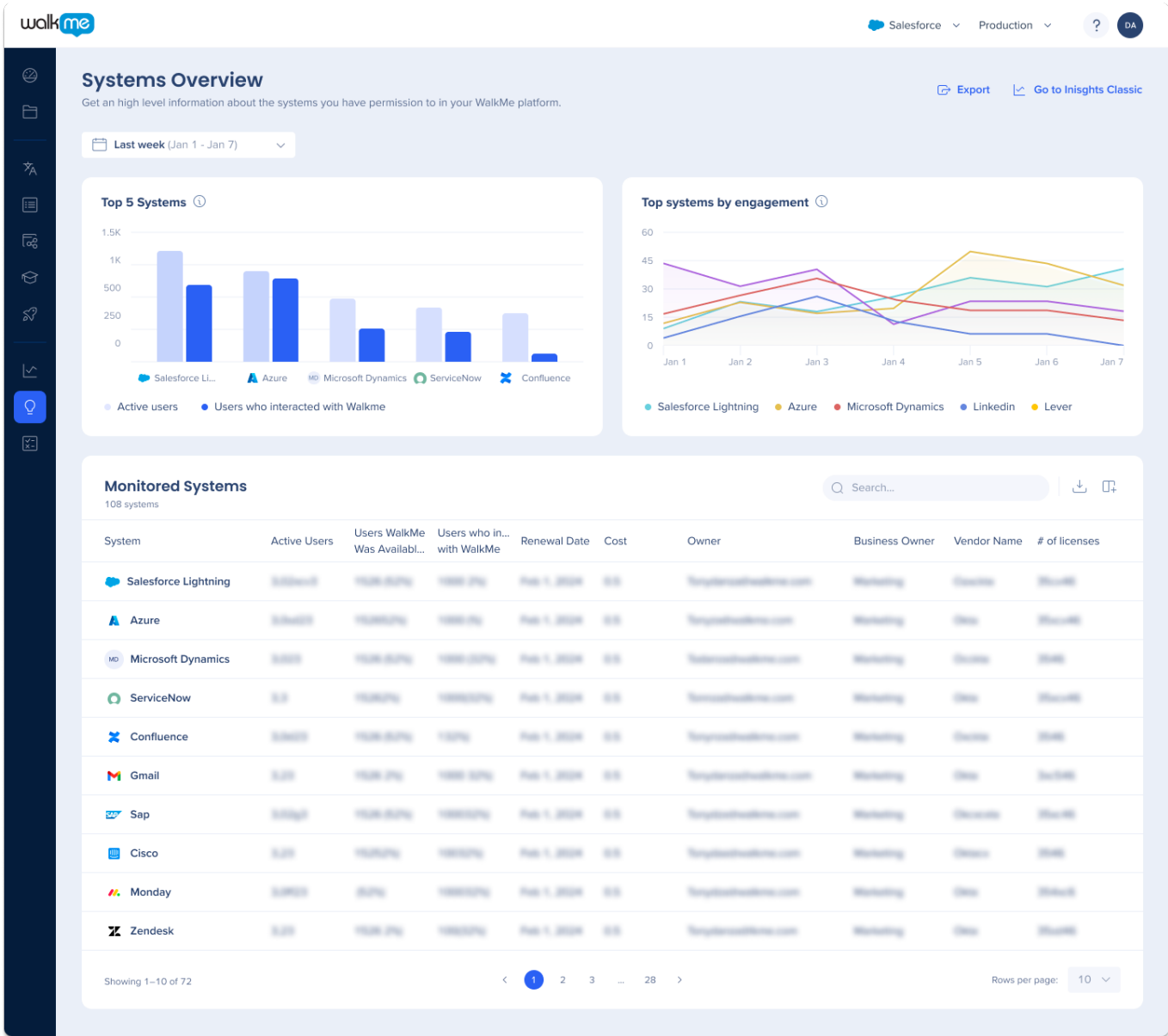


New Console Insights

Brief Overview

WalkMe Insights, your go-to destination for understanding the performance of your DAP Initiatives, will gradually **transition into the WalkMe Console**. This updated platform offers a more comprehensive analytics experience for your DAP initiatives, and allows you to manage all of your favorite WalkMe applications, including Discovery, UI Intelligence, many more from one convenient location.

Currently, the Systems Overview dashboard is the first feature to be moved to the console. Don't worry, the original web application, which we will refer to as "Insights Classic", will remain available for the indefinite future. Work where you're comfortable, but we want to highlight that **the Console Insights will be continuously updated with the latest and most advanced capabilities**. For instance, the newly launched feature of creating custom dashboards is now available exclusively on Console Insights.



Workstation Data Not Supported

Please note that the Insights feature currently does not support or analyze workstation data. However, we are constantly working to improve our system, and we plan to add support for workstation data in the future. In the meantime, you can still access and learn more about your workstation data from the [workstation dashboard](#) in the console.

Use Cases

- Measure usage and optimize your WalkMe solution
- Measure usage and optimize your underlying website
- Analyze your end-users behavior
- Recognize instances of end-user confusion and capitalize on these opportunities to improve

Access

The new Insights is located in the [WalkMe Console](#). The Systems Overview page serves as the primary Insights dashboard and default homepage for all accounts. To access the page:

1. Hover over the navigation sidebar in the console
2. Click **Insights (NEW)**
3. Click **Systems Overview**

What's changed?

High level changes

- **Design:** The page features a sleek new design
- **Enhanced filters:** We've added the ability to select **specific months** and **quarters** to our time filters to improve the user experience
- **Updated widgets:** The metrics widgets have undergone significant updates, with outdated ones being replaced by new and improved versions. Additionally, reused metrics have been updated with new titles, tooltips, and design to enhance their clarity and usability
- **Export:** Now using the export button, you can export pages to png files, and export individual widgets to CSV / XLSX files

Systems Overview

See what's changed

The new Systems Overview dashboard page offers a high-level view of software usage across an organization, allowing users to track frequently used systems and those with high WalkMe

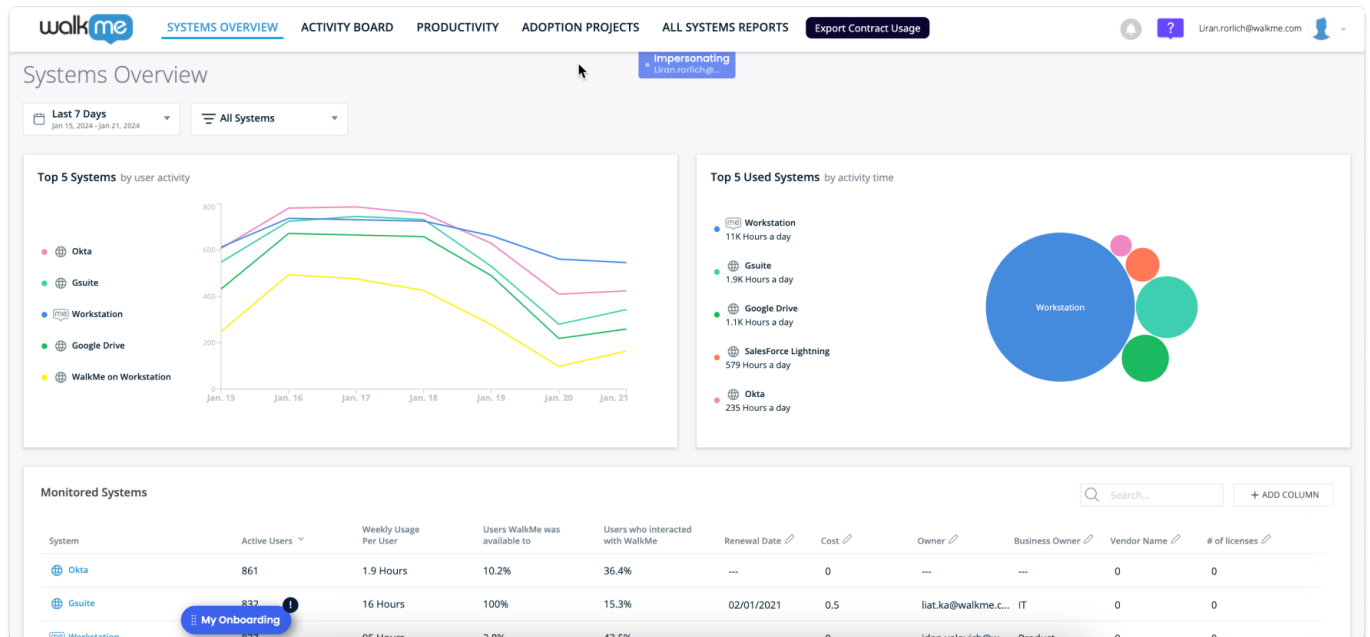
engagement. Users can also view a list of monitored systems in the WalkMe account.

The widgets have undergone significant updates and you can learn more about them [here](#).

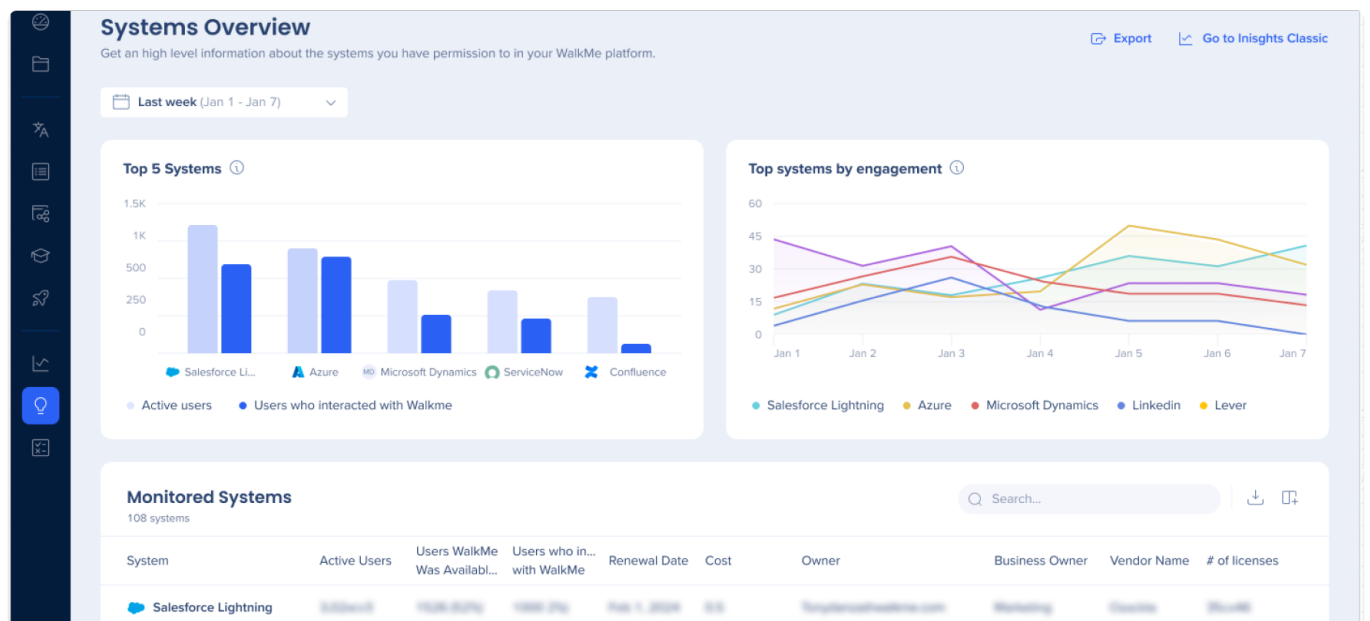
New capabilities include:

- Add widgets to custom dashboards
- Export widgets to CSV / XLSX files

Before



After



System Overview

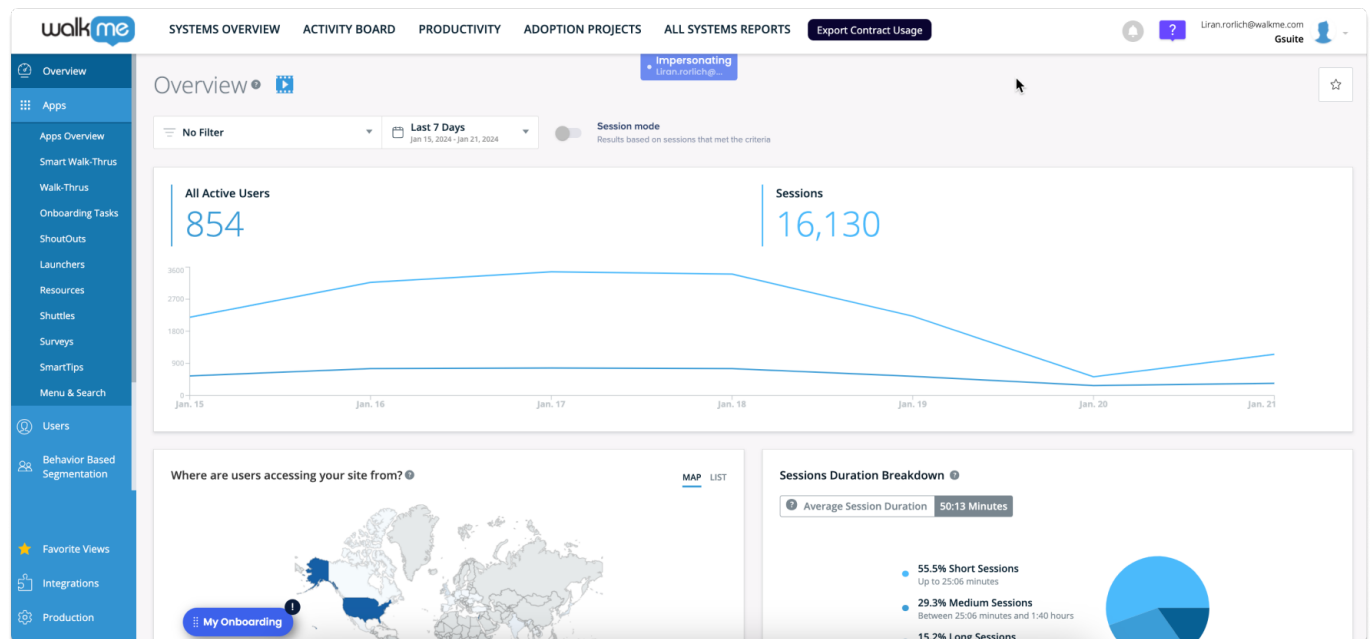
See what's changed

The new System Overview page in the Console provides a dashboard with visibility into the most commonly used software applications and user engagement within systems, leveraging the data from Discovery. It is made up of several widgets showing user analysis funnel, user analysis trends, where users access from, WalkMe interactions, top content, and top goals.

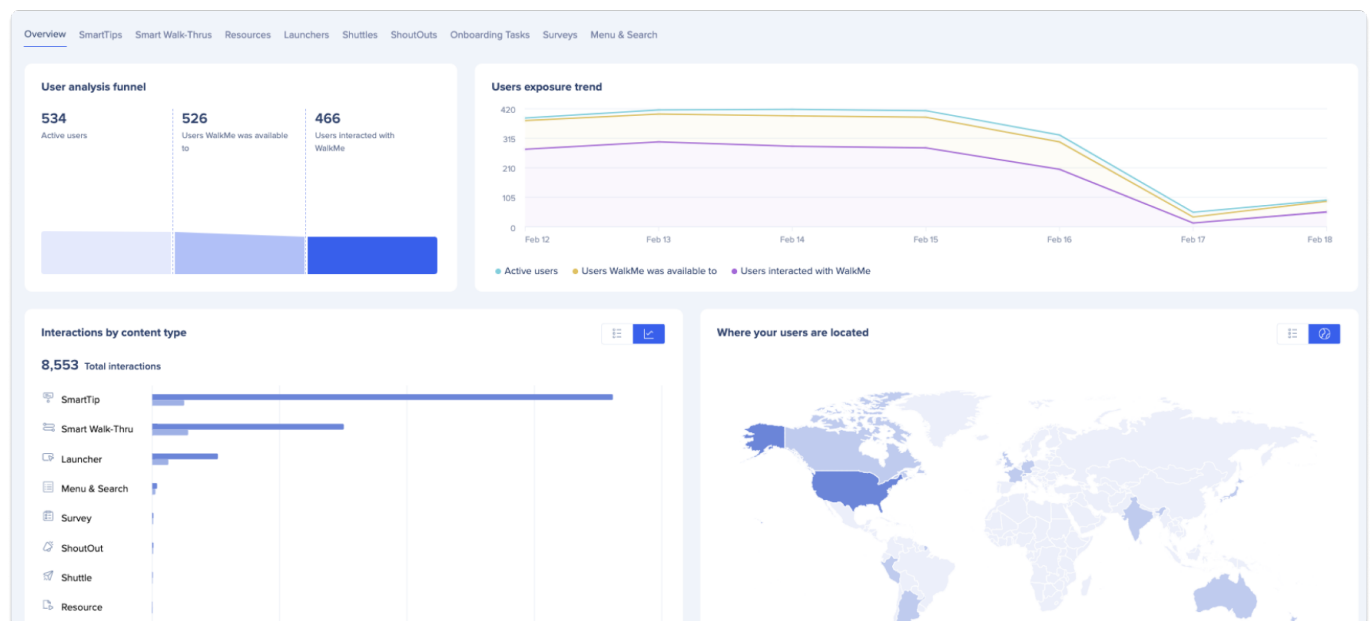
New updates and capabilities include:

- The widgets have undergone significant updates, with outdated ones being replaced by new and improved versions. Additionally, reused metrics have been updated with new titles, tooltips, and design to enhance their clarity and usability
- Apps sidebar moved to tabs on the system overview page
- Add widgets to custom dashboards
- Switch widget view from graph to list view
- When hovering and clicking on user metrics in list view, a side panel will open lists of the unique users

Before



After

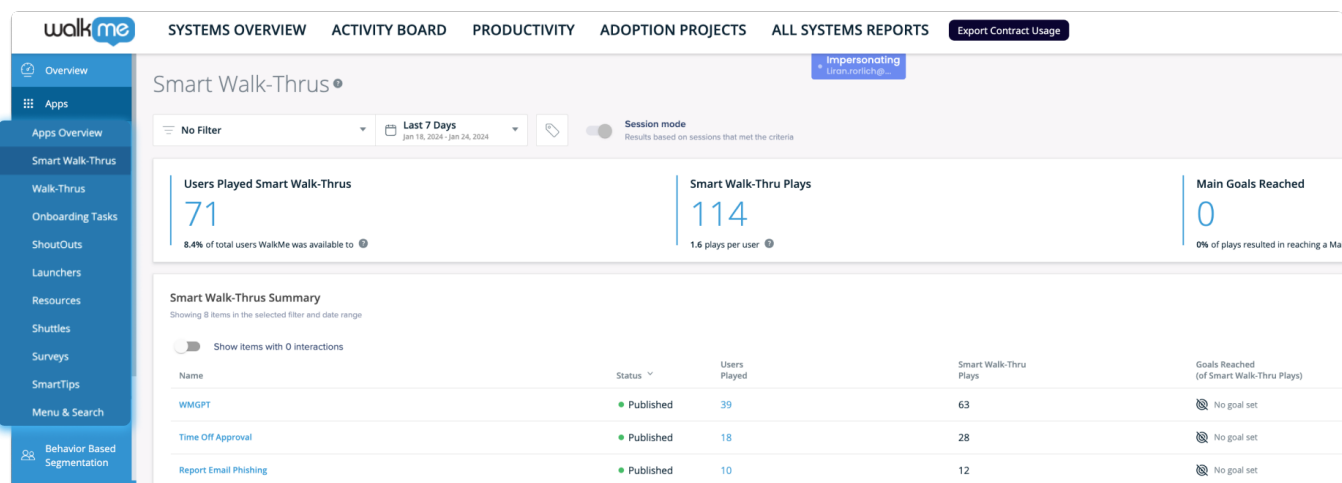


Apps Dashboards

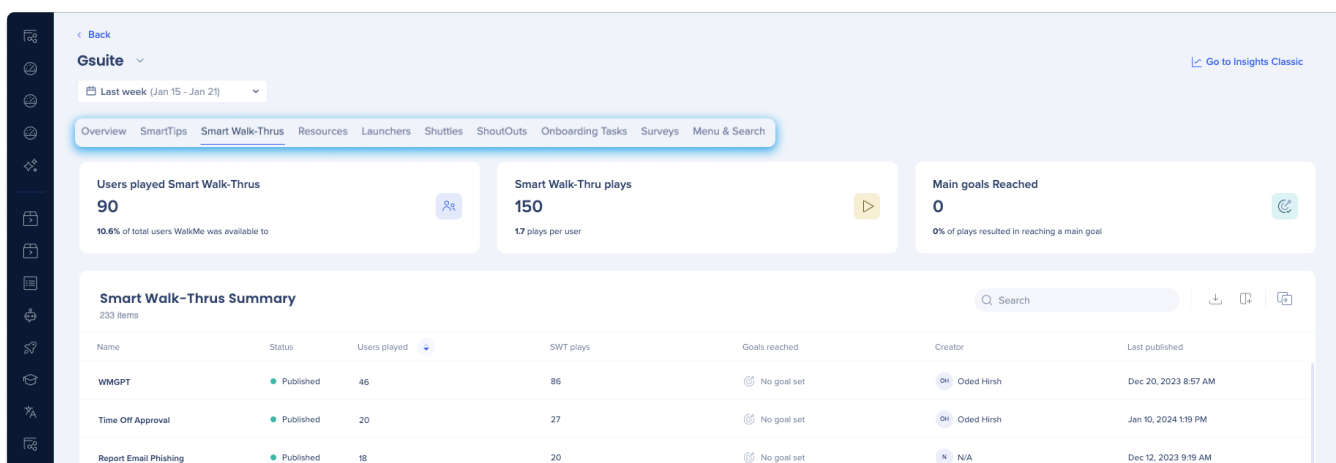
See what's changed

The new design enables users to access the system overview and apps directly from the page through the use of tabs. This updated approach improves the user experience compared to the previous design where apps were accessed through a sidebar.

Before



After



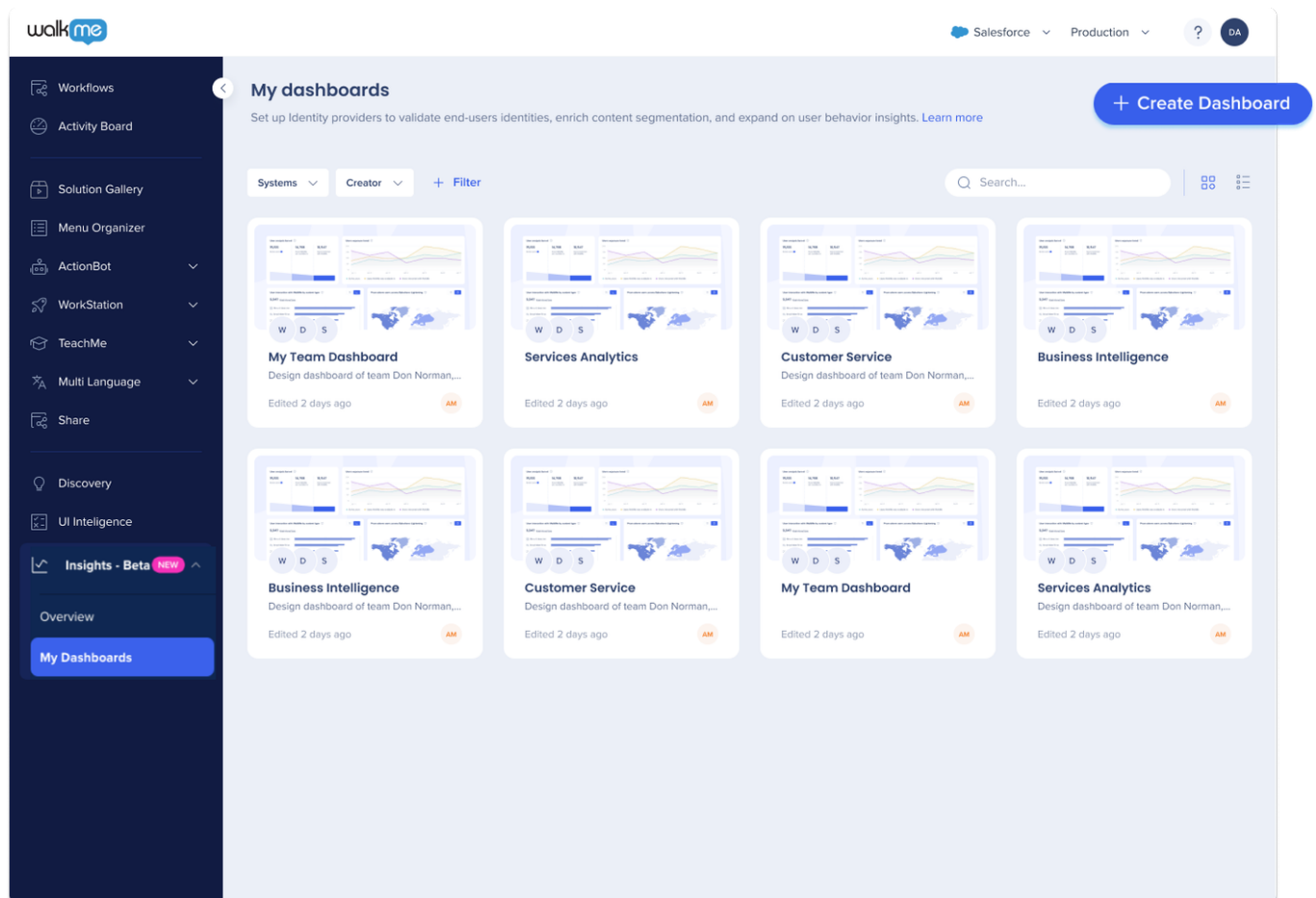
New Features

My Dashboards

See what's new

My Dashboards page allows users to create their own custom dashboard. With this feature, users can add metric widgets from different systems to create unique insights dashboards. This allows users to tailor their dashboard to their specific needs and preferences.

The My Dashboards page is a valuable tool for those who want a more personalized and efficient way to monitor their metrics and gain insights.



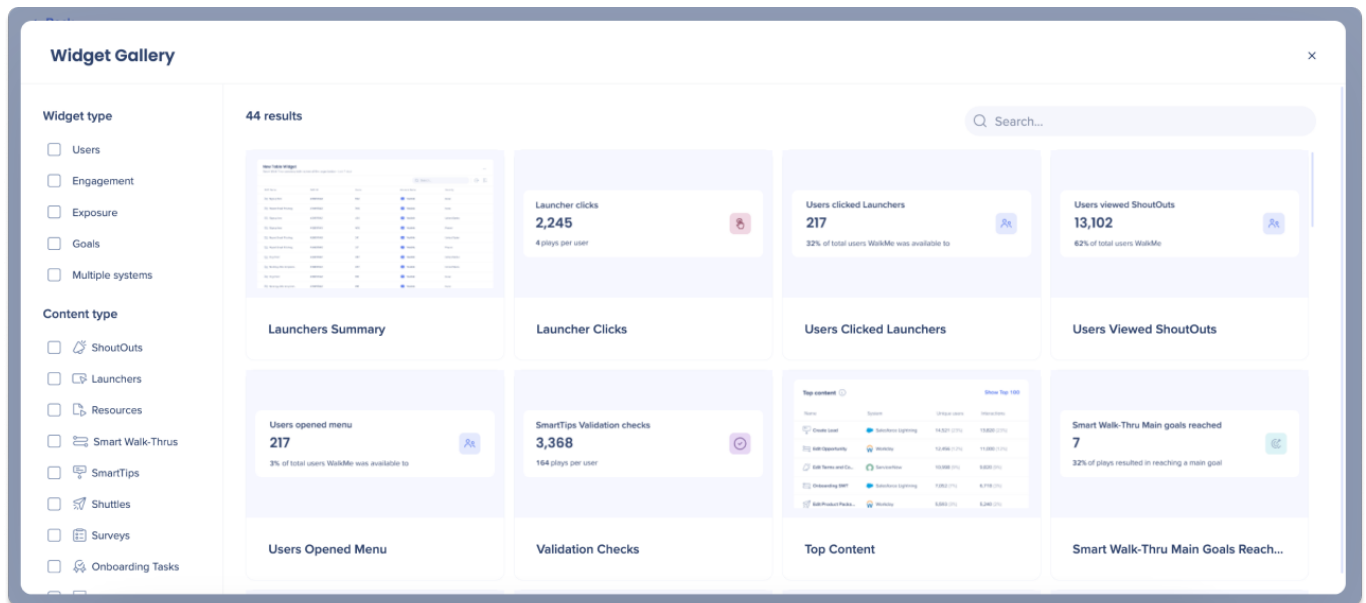
How to create a new dashboard

1. Navigate to the My Dashboard page in the console under the Insights tab
2. Click **Create Dashboard**. You can also rename your Dashboard and add a description
3. Click **Add Widget**
4. Select a widget from the Widget Gallery

Tip: Narrow down your search results by filtering based on Widget type or Content type.

5. Select the system from which you wish to retrieve data for the widget. You can also rename the widget and add a description

6. Click **Add Widget**



Additional Capabilities

- **Time range filters:** Allows you to display data over a specific period of time
- **Add Widgets:** Add widgets to your Dashboard from the side or bottom of the screen
- **Rearrange Widgets:** Customize the layout of your Dashboard by rearranging the placement of your widgets
- **Hover and Add:** Quickly add widgets to your Dashboard from system overview pages by hovering over them and clicking **Add to Dashboard**

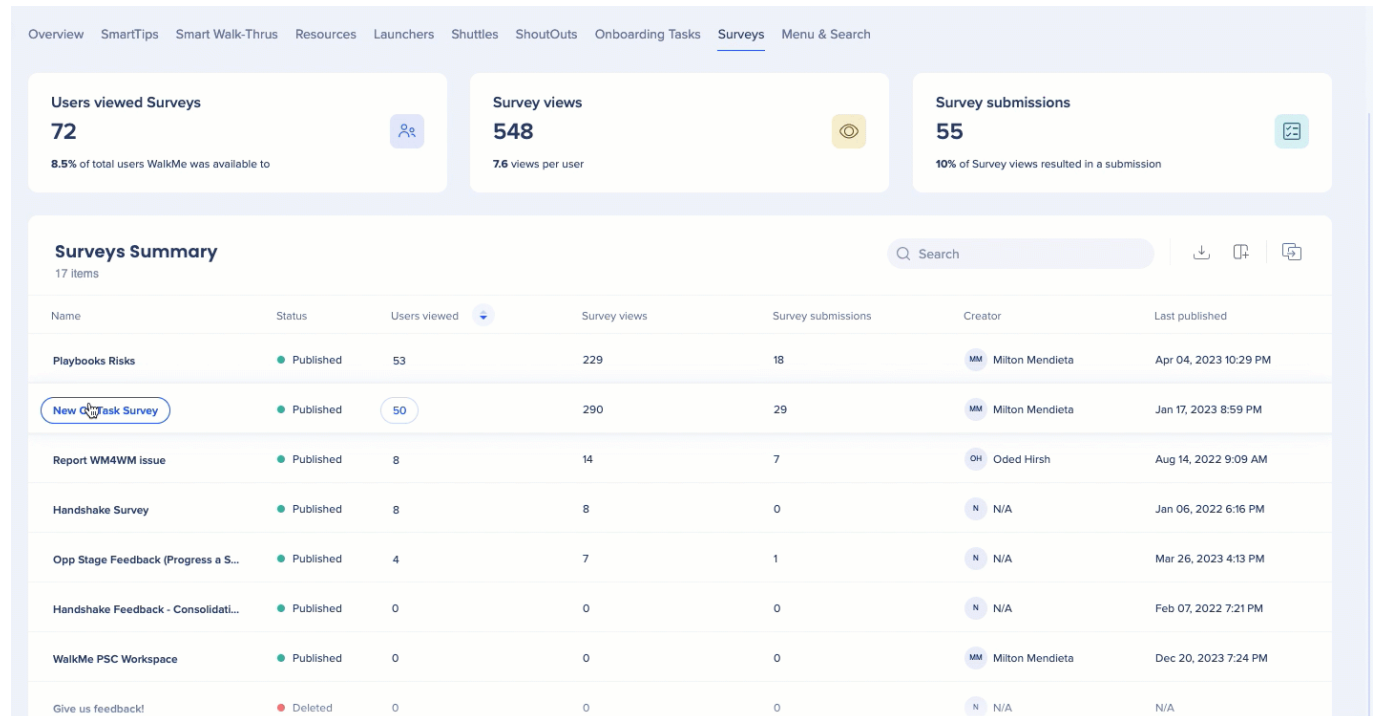
Survey AI Summaries

See what's new
Enabled feature

This is an enabled feature. Please reach out to your Customer Success Manager or WalkMe contact to request access.

There is a new AI feature called AI Summary now available on the Surveys app page. This tool is specifically designed to assist users in summarizing responses to open-ended survey questions, especially when dealing with large amounts of responses.

With AI summary, users can quickly and efficiently analyze survey responses and draw meaningful insights from them.



The screenshot shows the WalkMe Surveys Summary dashboard. At the top, there's a navigation bar with links: Overview, SmartTips, Smart Walk-Thrus, Resources, Launchers, Shuttles, ShoutOuts, Onboarding Tasks, Surveys (selected), and Menu & Search. Below the navigation bar, there are three summary cards:

- Users viewed Surveys**: 72 (8.5% of total users WalkMe was available to)
- Survey views**: 548 (7.6 views per user)
- Survey submissions**: 55 (10% of Survey views resulted in a submission)

Below these cards is the **Surveys Summary** section, which includes a search bar and a table of 17 items. The table has columns: Name, Status, Users viewed, Survey views, Survey submissions, Creator, and Last published.

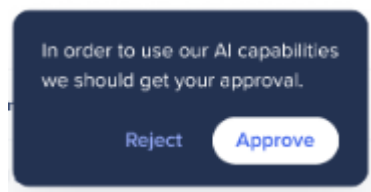
Name	Status	Users viewed	Survey views	Survey submissions	Creator	Last published
Playbooks Risks	Published	53	229	18	MM Milton Mendieta	Apr 04, 2023 10:29 PM
New Task Survey	Published	50	290	29	MM Milton Mendieta	Jan 17, 2023 8:59 PM
Report WM4WM issue	Published	8	14	7	OH Oded Hirsh	Aug 14, 2022 9:09 AM
Handshake Survey	Published	8	8	0	N N/A	Jan 06, 2022 6:16 PM
Opp Stage Feedback (Progress a S...	Published	4	7	1	N N/A	Mar 26, 2023 4:13 PM
Handshake Feedback - Consolidati...	Published	0	0	0	N N/A	Feb 07, 2022 7:21 PM
WalkMe PSC Workspace	Published	0	0	0	MM Milton Mendieta	Dec 20, 2023 7:24 PM
Give us feedback!	Deleted	0	0	0	N N/A	N/A

How to use

1. Request to have AI Summary enabled from your Customer Success Manager or WalkMe contact
2. Navigate to the Survey app of the desired system
3. Select the survey you want to summarize from the Surveys Summary list
4. Click the **Summarize** button
5. The tool will generate an instant summary of all the responses to the survey

AI summaries requires customer consent

- AI won't be enabled until approved
- One user can approve for the entire account
- Approver is logged into our database



Tip Tuesday Video



Limitations

- Cloud deployment required
- self-hosted is not supported
- No time zone support. Data is filtered and displayed in UTC
- No Mobile Web support. The data displayed relates only to the Desktop (main) platform
- No multi environment support. The data displayed only for production environment
- Workstation data is not supported in Insights