Report Builder

Brief Overview

Insights Reports already give you access to all your WalkMe data, allowing you to examine your data in many different ways and variations. The Insights Report Builder takes this a step further and allows you to create custom reports tailored specifically for your needs with a self-service tool.

The Report Builder guides you through the process to create your own customized reports, beginning with choosing a template that best suits your needs, and then offering additional columns and filters for data enhancement.

Once the report is created it can be used in WalkMe just as any other report: it can be exported, subscribed to, or used for integrations.

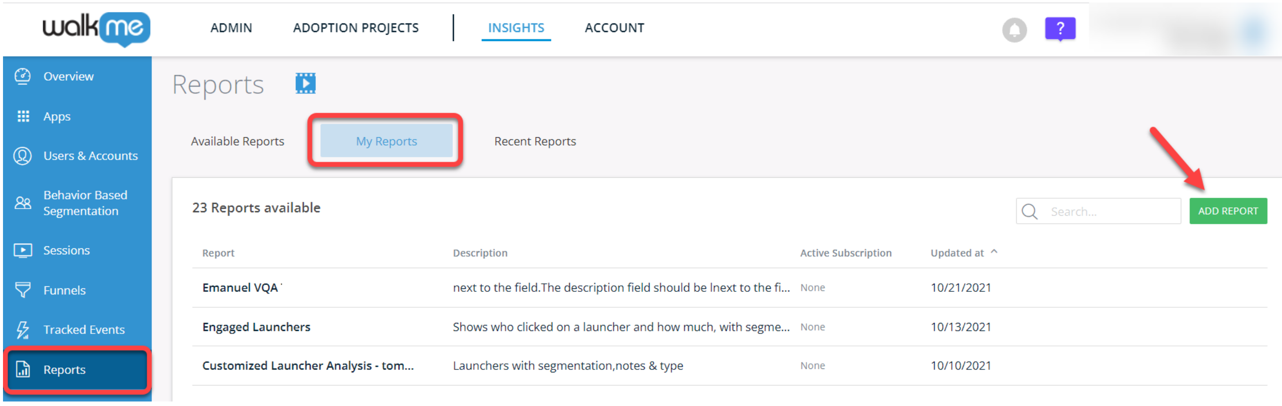
Tip

Please refer to the ***Insights: Getting Started Guide*** if you need an Insights refresher.

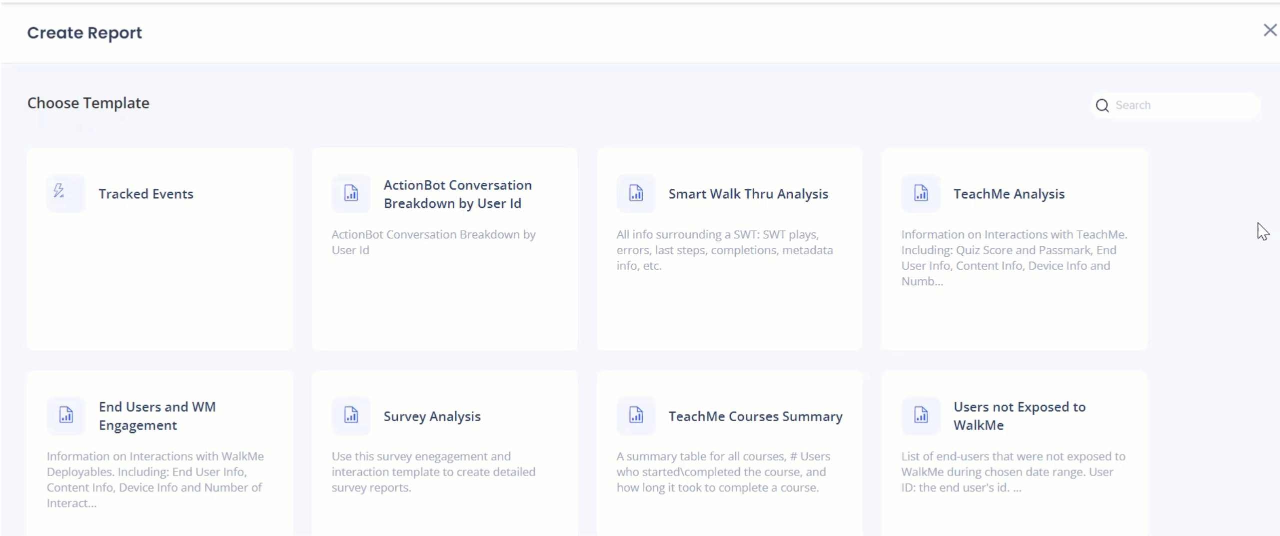
How to Build a Report

1. Choose a Report Template

1. Navigate to the system you want to create a report on in **Insights** at **insights.walkme.com**
    - **Note**: You can also create a report for all systems from the **All Systems Reports page**
2. Click **Reports** from the sidebar
3. Click the **My Reports** tab
4. Click the **ADD REPORT** button



5. Choose from the available predefined templates to begin building your report



Tip

- The Report Builder offers several out of the box templates chosen with the most commonly built reports in mind
- It is recommended to look for the template that suits your needs best and use it as a starting point to create your own report

2. Add and Modify Column Reports

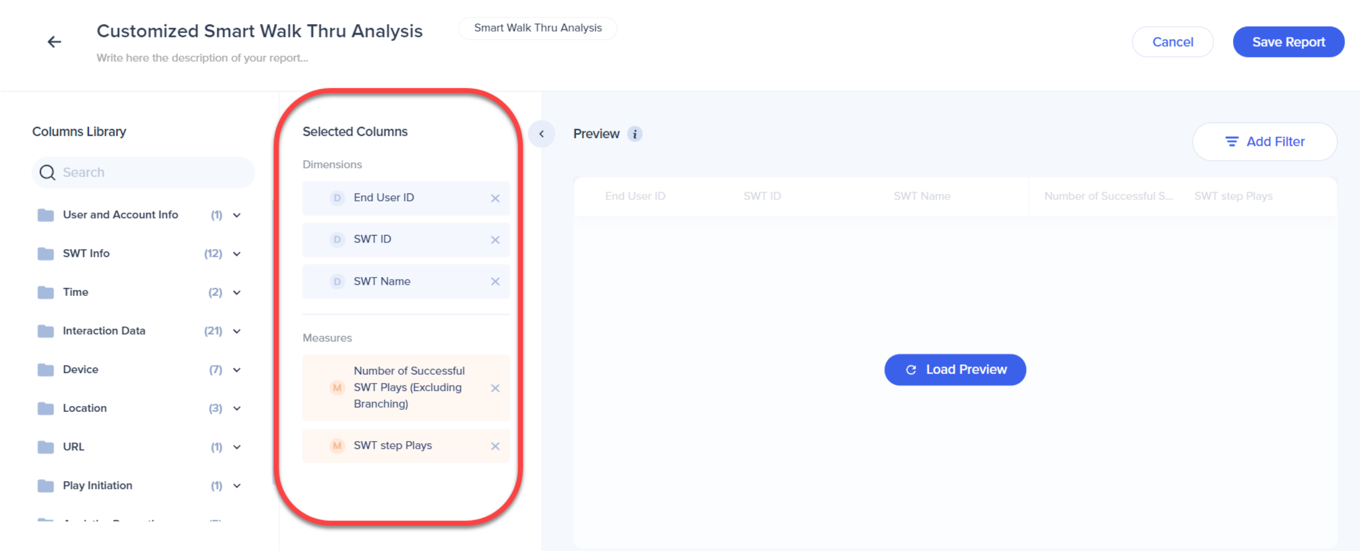
Once a template is selected, the Report Builder will automatically display the default Selected Report Columns, grouped by their type – Dimensions or Measures.

Dimensions: contain qualitative values you can use to categorize and filter your data, affecting the level of details in the report.

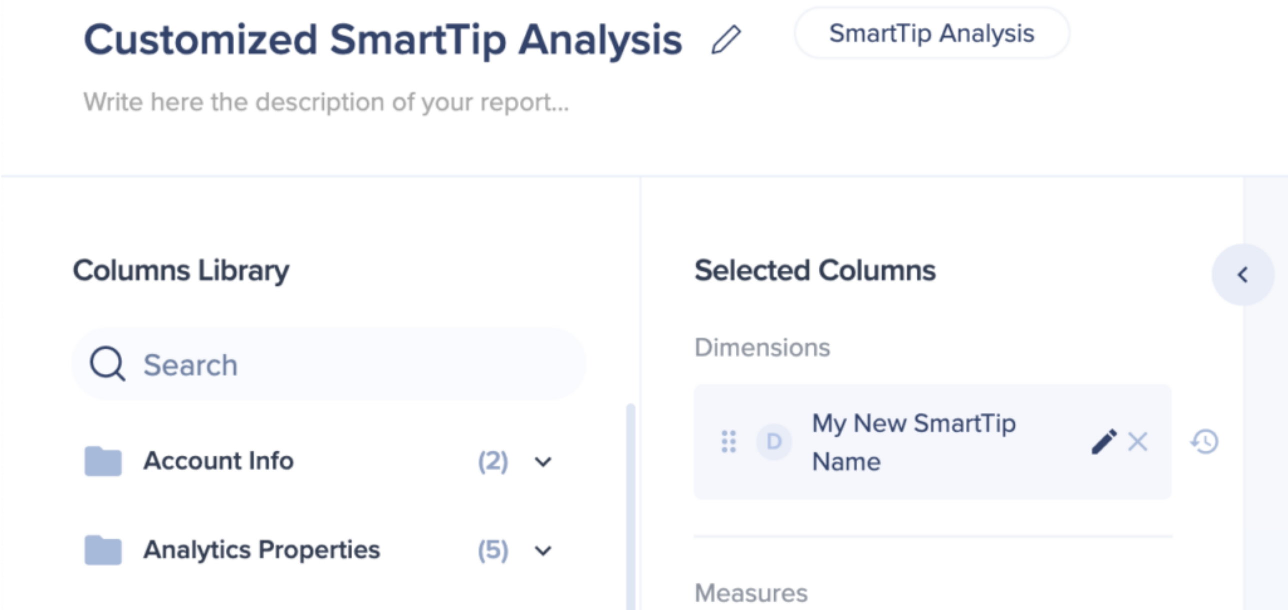
- Examples: End User ID, ShoutOut Name, ShoutOut Action Name, Language, Browser Version, Country, User role

Measures: contain numeric, quantitative values that you can measure, aggregate, summarize and count.

- Examples: ShoutOut plays, ShoutOut action clicks, Number of Users Exposed to ShoutOut, Number of Users who Clicked ShoutOut



You can hover over a field name and click the **pencil** icon to rename a measure or dimension.



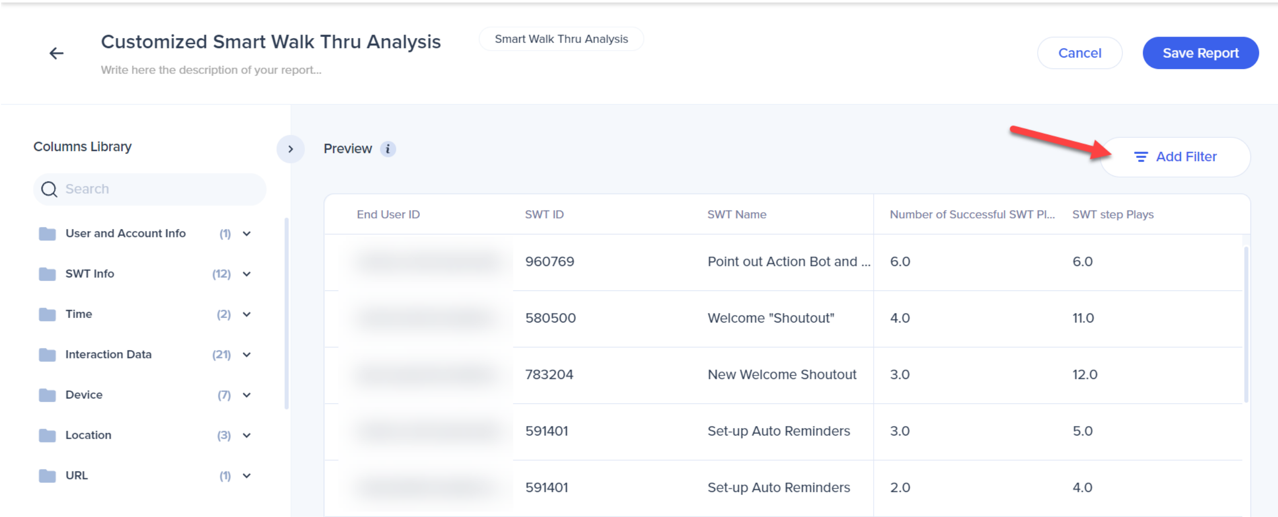
You can then modify the columns that you would like to appear in your report by dragging them from the Columns Library to the Selected Columns section.

You can rearrange your columns in the order you would like them to appear in your report and use the X button to remove any undesired fields.

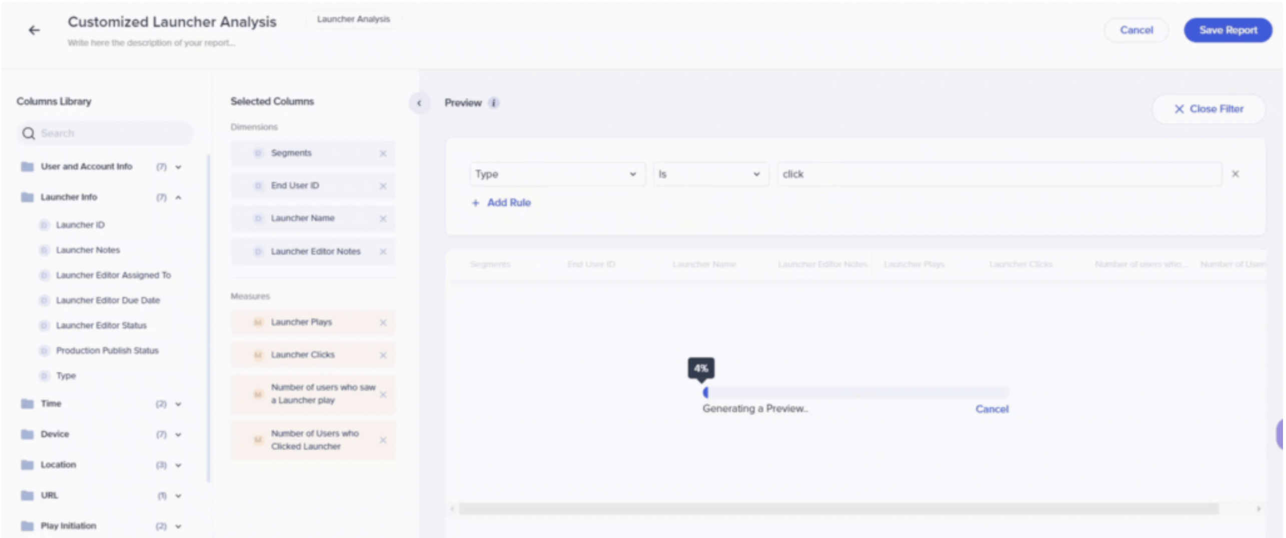
Clicking on "Load Preview" will show a sample of the data from the previous day.

3. Add and Modify Report Filters

1. Use the **Add Filter** button to filter the report based on specific conditions



2. Add a rule with the desired field, condition, and value to filter the report



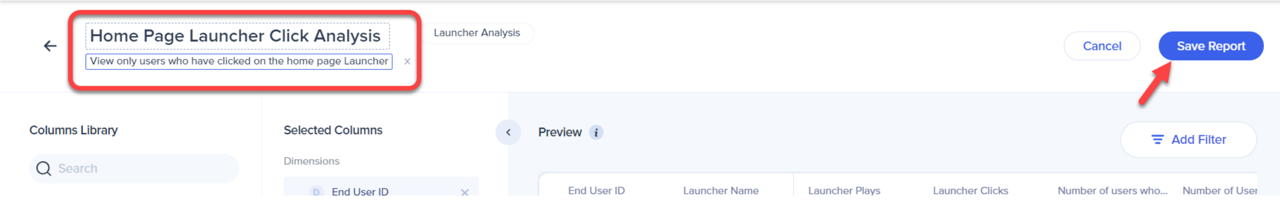
Tip

- More than 1 filter can be used together in an AND statement
- Filters are only available for Dimensions
- In the example above, we narrowed the Launcher Engagement Report to only show click events (instead of also showing impressions and plays)
- When using “in list” filtering you need to add a comma after the value

4. Set Name & Description

Once you are satisfied with the format of the report:

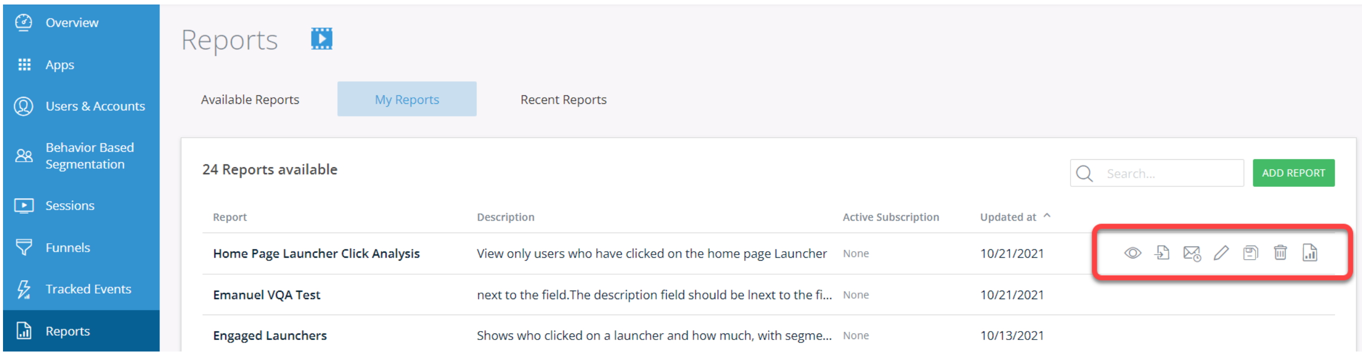
1. Name your report and give it an optional description
2. Click the **Save Report** button once you are ready



3. The new report will now appear under "My Reports"

5. Using My Reports

- All the reports that are created in the Report Builder are available in the My Reports tab on the Reports page
- Hovering over a row will reveal several options:
  - **Preview –** Opens a popup preview of the report
  - **Export –** Export just like with out of the box "Common Reports"
  - **Subscribe –** Subscribe just like with out of the box "Common Reports"
  - **Edit** – Returns the Modify Columns screen (step 2)
  - **Duplicate** – Opens the Modify Columns screen (step 2) to allow you to make minor changes and then save as another report
  - **Delete –** Prompts for confirmation and then deletes the report



Note

Any user that has access to a System's Insights page can access these reports, view, create, and modify them.

Integrations

- "My Reports" can be used in the Integration Center, similarly to any other "Common Report"

Filtering Data with Insights Filters

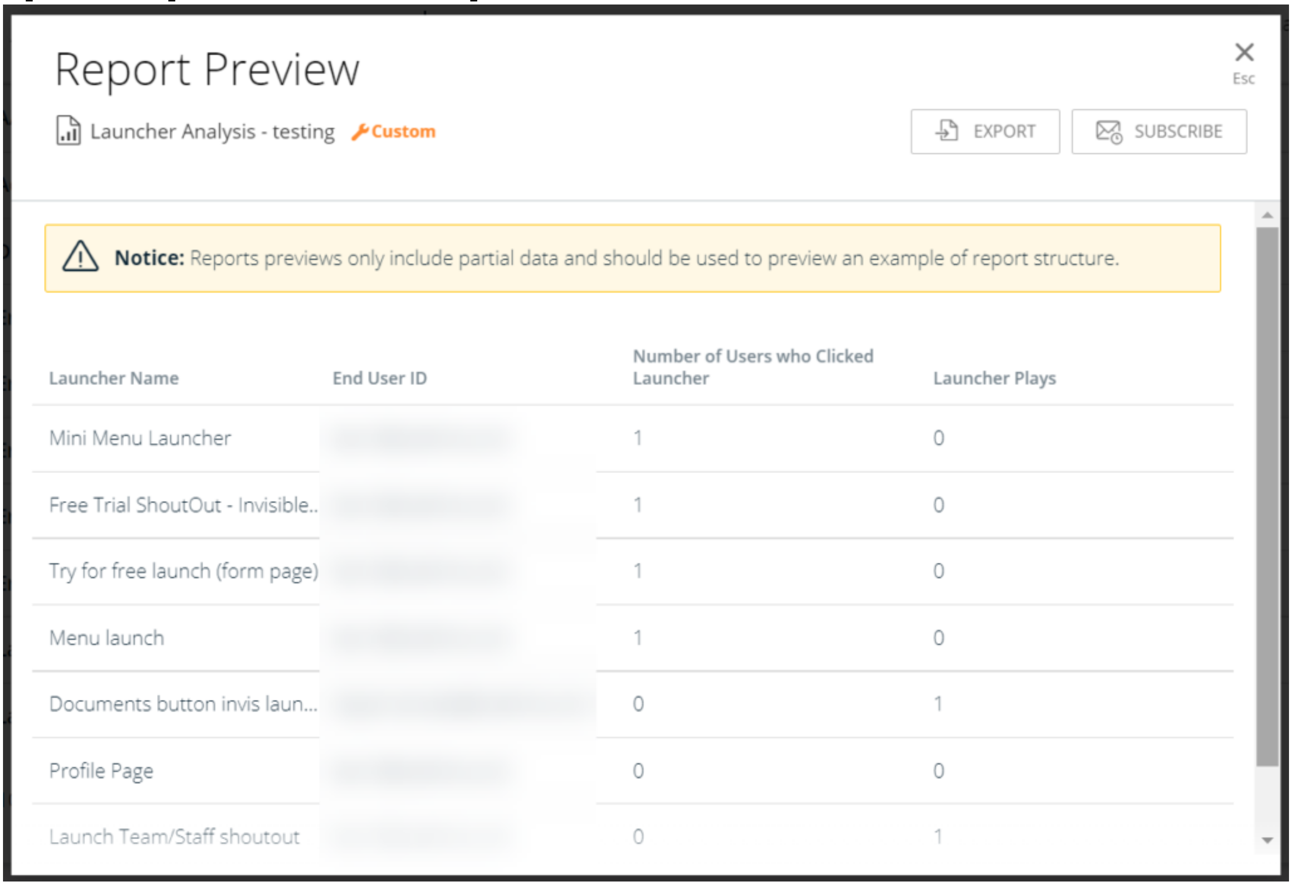
- All the filters that are created in Insights can be used with “My Reports”
- It is recommended to use the default Reports Builder filters as your first choice

Example: In case you would like to filter your report by a certain ShoutOut, you should use “ShoutOut Name” for filtering rather then the “event occurred” Insights filter.

Report Preview

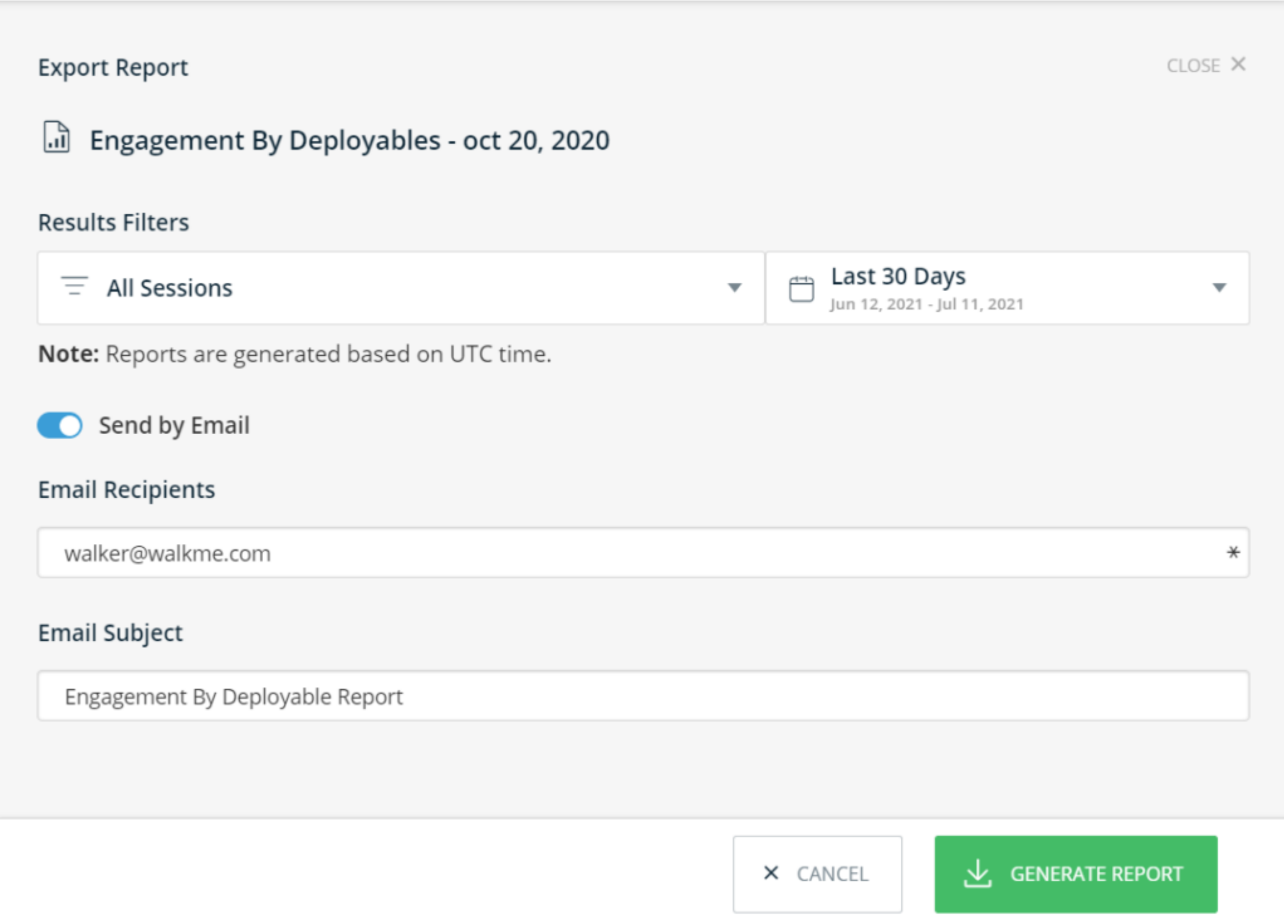
- Opens a popup preview of the report

Option to export or subscribe to report



Export Report

- Presents option to add additional filters and choose a date range
- Enable the “Send by Email” toggle if you would like to send the report by email as well – you then must add an email address and email subject
- Click the “Generate Report” button once you are ready

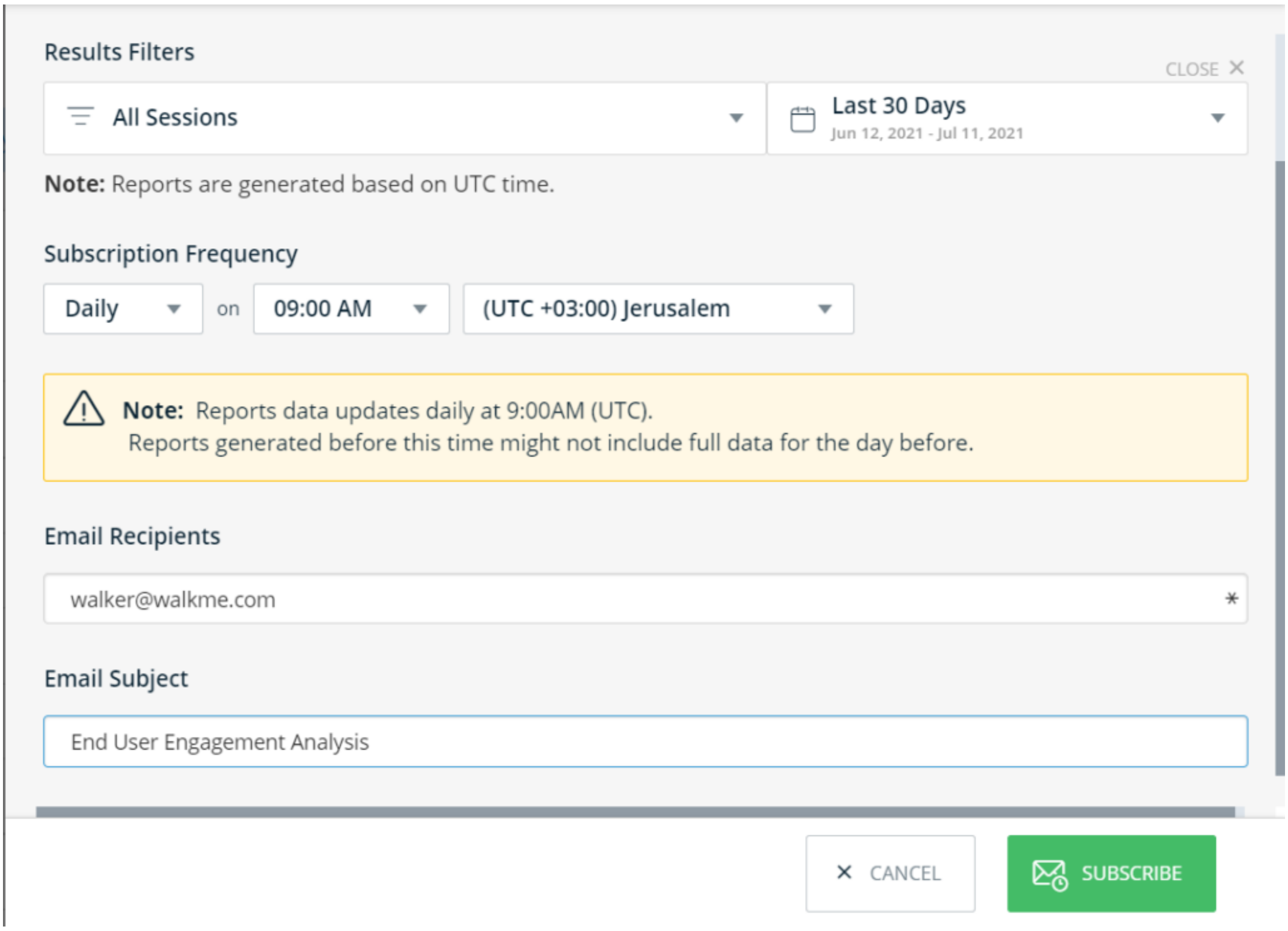


See a blank for Item Name?

- If you see a blank for Item Name in your preview or exported report, it means that the event is an internal process and not related to any WalkMe item types (for example: "WalkMe" or "Player")
  - To view only interactions with specific WalkMe items, it's best to filter out these irrelevant events. We recommend using the filter "Item Name is not null" to remove them from your report

Report Subscription

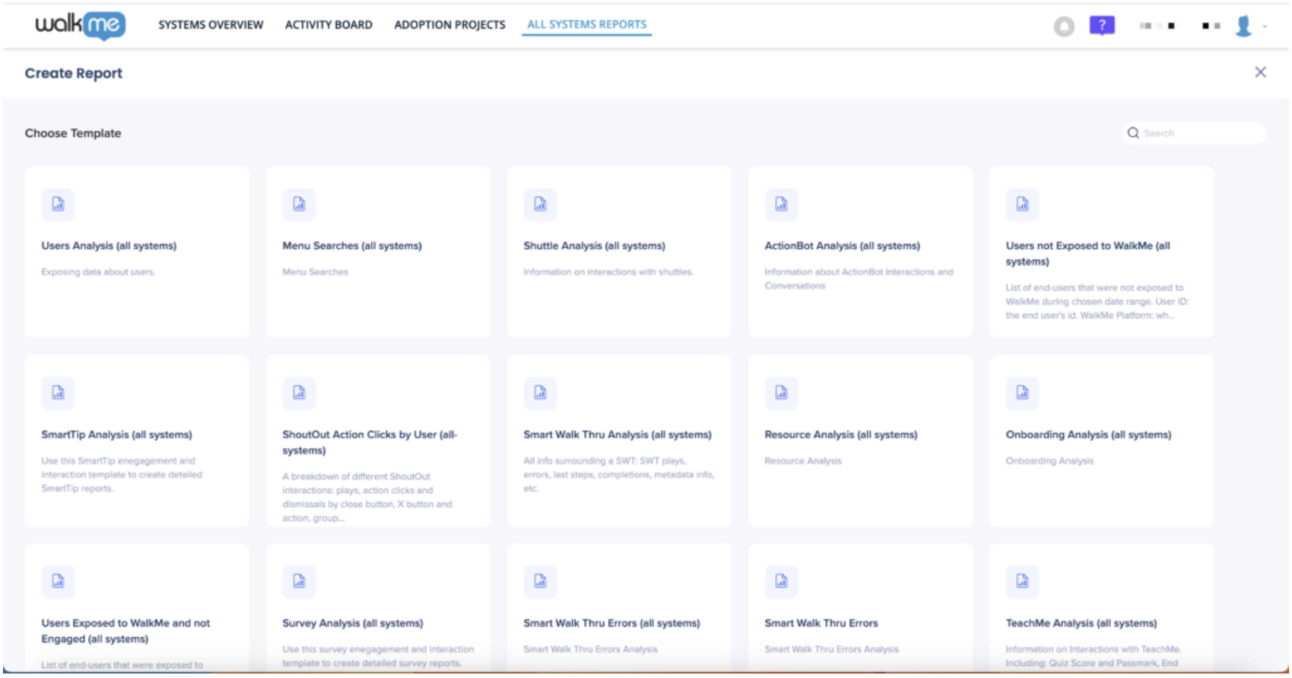
- Presents option to add additional filters and choose a date range
- Select the desired frequency for your subscription
- Enter an email address and email subject
- Click the **Subscribe** button once you are ready



All Systems Reports

The Report Builder tool can also be used to create reports at the account level from the [All Systems Reports] page.

There, you can follow the same process to create a report but the templates will indicate that they are for **All Systems**.



Note

This feature is currently in beta testing. Please request access from your Customer Success Manager or WalkMe contact.

Best Practices

- Use the “in list” filter condition to **implement “OR” efficiently for multiple values**
- **See “null” in the preview screen?** This is an expected behavior
    - Reports combine different data sources behind the scenes – this, together with the flexibility offered, might result in fields that don’t make sense
    - For example: showing SWT ID doesn’t make sense if the deployable type is “ShoutOut”
- Sending reports to **multiple subscriptions** can now be achieved by duplicating reports and setting different subscriptions to each copy
- Looking to report **specific Tracked Events** (TE) that keep changing? While it is possible to filter TE names in the template, if a user constantly changes their TE selection, it is easier to select specific Tracked Events from the main report screen (click “export” or “subscribe” and look for “Select a list of Tracked Events”)
- Reports **may be modified or deleted** by users even if they are attached to integrations or have been subscribed to
    - In such cases, the change will also cause the integration or subscription **to alter or fail** if deleted

- Requests for additional fields are welcome

Limitations

- Only system level reports can be created
- Enterprise level reports **cannot** be created with the Report Builder
- Using the OR condition between different columns is not currently supported
- Having **one template to include all fields** is not currently possible
- Connecting customized reports with integrations is **still in Beta stage** – bugs are expected, however Common Reports should work as usual