

# <u>Report Builder</u>

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

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Q	Users & Accounts	Available Reports	My Reports	Recer	t Reports					
88	Behavior Based Segmentation	23 Reports availab	le						Q Search	ADD REPORT
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52	Tracked Events	Engaged Launchers	5	Shows who cl	cked on a	a launcher and how much, with se	gme None	10/13/2021		
	Reports	Customized Launch	ner Analysis - tom	Launchers wi	:h segmer	ntation,notes & type	None	10/10/2021		

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



Create Report				
hoose Template			Q Search	
7 Tracked Events	ActionBot Conversation Breakdown by User Id	All info surrounding a SWT: SWT plays, errors, last steps, completions, metadata info, etc.	TeachMe Analysis Information on Interactions with TeachMe. Including: Quiz Score and Passmark, End User Info, Content Info, Device Info and Numb	
End Users and WM Engagement Information on Interactions with WalkMe Deployables. Including: End User Info, Content Info, Device Info and Number of Interact	Survey Analysis Use this survey enegagement and interaction template to create detailed survey reports.	TeachMe Courses Summary Asummary table for all courses, # Users who started completed the course, and how long it took to complete a course.	Users not Exposed to WalkMe List of end-users that were not exposed to WalkMe during chosen date range. User ID: the end user's id	

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



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Columns Library		Selected Columns		< Preview i		<b>∓</b> Add Filter
Q Search		Dimensions	_ [			
User and Account Info	(1) ~	D End User ID	×			
SWT Info	(12) ~	D SWT ID	×			
Time	(2) ~	D SWT Name	×			
Interaction Data	(21) 🗸	Measures				
Device	(7) ~	Number of Successful SWT Plays (Excluding	×		C Load Preview	
Location	(3) 🗸	Branching)				
URL	(1) 🗸	M SWT step Plays	×			
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You can hover over a field name and click the **pencil** icon to rename a measure or dimension.

Customized Smar		SmartTip Analysis	
Columns Library		Selected Columns	<
Q Search		Dimensions	
Account Info	(2) 🗸	Hy New SmartTip Name	×S
Analytics Properties	(5) 🗸	Measures	

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



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Columns Library	>	Preview 1				Ţ Add Filter
Q Search User and Account Info	(1) ~	End User ID	SWT ID	SWT Name	Number of Successful SWT Pl	SWT step Plays
SWT Info	(1) ~ (12) ~		960769	Point out Action Bot and	6.0	6.0
Time	(2) 🗸		580500	Welcome "Shoutout"	4.0	11.0
Interaction Data	(21) 🗸		783204	New Welcome Shoutout	3.0	12.0
Device	(7) 🗸					
Location	(3) 🗸		591401	Set-up Auto Reminders	3.0	5.0
URL	(1) 🗸		591401	Set-up Auto Reminders	2.0	4.0

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

Customized Launche     Write here the description of your r			Cancel Save Report
Columns Library	Selected Columns	< Preview ()	× Close Filter
Q Search	Dimensions		
User and Account Info (7) v	Segments ×		
Launcher Info (7)	D End User ID X	Type v ls v dlck + Add Rule	×
Launcher ID	D Launcher Name ×	+ Add Kule	
D Launcher Notes	Launcher Editor Notes ×		
Launcher Editor Assigned To			
Launcher Editor Due Date	Measures		
Launcher Editor Status	M Launcher Plays X		
Production Publish Status	Launcher Clicks X	45	
Type	Number of users who saw ×		
Time (2) ~	a Launcher play	Generating a Preview Cance	4
Device (7) v	Number of Users who Clicked Launcher		
Location (3) ¥			
URL (1) ¥			
Play Initiation (2) v			

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

← Home Page Launch	her Click Analysis ed on the home page Launcher ×	Launcher Analy	sis				Cancel	Save Report
Columns Library	Selected Columns	•	Preview i				=	Add Filter
Q Search	Dimensions							
	D End User ID	×	End User ID	Launcher Name	Launcher Plays	Launcher Clicks	Number of users who.	Number of User

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"
  - $\circ~{\bf Subscribe}$  Subscribe just like with out of the box "Common Reports"
  - $\circ~$  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
  - $\circ~$  **Delete -** Prompts for confirmation and then deletes the report

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	Apps				
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88	Behavior Based				
	Segmentation	24 Reports available			Q Search ADD REPORT
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$\nabla$	Funnels	Home Page Launcher Click Analysis	View only users who have clicked on the home page Launcher Non	ne 10/21/2021	◎ £ ਲ਼, ⁄ Ⴒ 🖬 🔓
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	Reports	Engaged Launchers	Shows who clicked on a launcher and how much, with segme Non	ne 10/13/2021	

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

Report Previe			문 EXPORT 문 SUB	K Esc SCRIBE
Notice: Reports previe	ws only include partial d	ata and should be used to prev	view an example of report structure.	
Launcher Name	End User ID	Number of Users wh Launcher	o Clicked Launcher Plays	
Mini Menu Launcher		1	0	
Free Trial ShoutOut - Invisible		1	0	
Try for free launch (form page)		1	0	
Menu launch		1	0	
Documents button invis laun		0	1	
Profile Page		0	0	
Launch Team/Staff shoutout		0	1	

#### **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



Export Report			close 🗙
Engagement By Deployables - oct 20, 2020			
Results Filters			
= All Sessions	•	Last 30 Days Jun 12, 2021 - Jul 11, 2021	•
Note: Reports are generated based on UTC time.			
Send by Email			
Email Recipients			
walker@walkme.com			*
Email Subject			
Engagement By Deployable Report			
		X CANCEL GENERATE REPO	RT

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")
  - $\circ\,$  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 Sessions			▼ Last 30 Days Jun 12, 2021 - Jul 11, 2	2021
Note: Reports are g	-	on UTC time.		
Daily • on	09:00 AM 🔻	(UTC +03:00) Jerusale	em 🔻	
		daily at 9:00AM (UTC). s time might not include fo	ull data for the day before.	
Reports ger	nerated before this		ull data for the day before.	-
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## All Systems Reports

The Report Builder tool can also be used to create reports at the account level from the <u>All Systems</u> <u>Reports</u> page.

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



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Users Analysis (all systems) Exposing deta about users.	Menu Searches (all systems) Menu Searches	Shuttle Analysis (all systems) Information on interactions with shuttles.	ActionBot Analysis (all systems) Information about ActionBot Interactions and Conversations	Users not Exposed to WalkMe (all systems) List of end-users that were not exposed to WalkMe during chosen date range. User ID: the end user's Id. WalkMe Platform: wh
	D			۵
SmartTip Analysis (all systems) Use this SmartTip enegagement and interaction template to create detailed SmartTip reports.	ShoutOut Action Clicks by User (all- systems) A breakdown of different ShoutOut Interactions; playa, action clicka and dismissial by close button, X button and action, group	Smart Walk Thru Analysis (all systems) All info surrounding a SWT: SWT plays, errors, last steps, completions, metadata info, etc.	Resource Analysis (all systems) Resource Analysis	Onboarding Analysis (all systems) Orboarding Analysis
	D			
Users Exposed to WalkMe and not Engaged (all systems)	Survey Analysis (all systems) Use this survey enegagement and interaction	Smart Walk Thru Errors (all systems) Smart Walk Thru Errors Analysis	Smart Walk Thru Errors	TeachMe Analysis (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
  - $\circ\,$  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