

Segmentation with Desktop

Desktop Legacy

This article is only relevant for Desktop Legacy users. Active Directory is not supported in Workstation. [If you are a Workstation user, please refer to this article.](#)

Brief Overview

Segments allow you to make your WalkMe content visible to some user groups, but not others. If WalkMe items aren't relevant to certain users or under certain conditions, they can be hidden using segmentation. This will allow your users to focus on the available tasks and reduce clutter on the screen and in the Widget.

- Segment WalkMe content to specific users for more targeted guidance
- Organize your content using the Segmentation Center to create dedicated Desktop Application folders

[Segmentation](#)

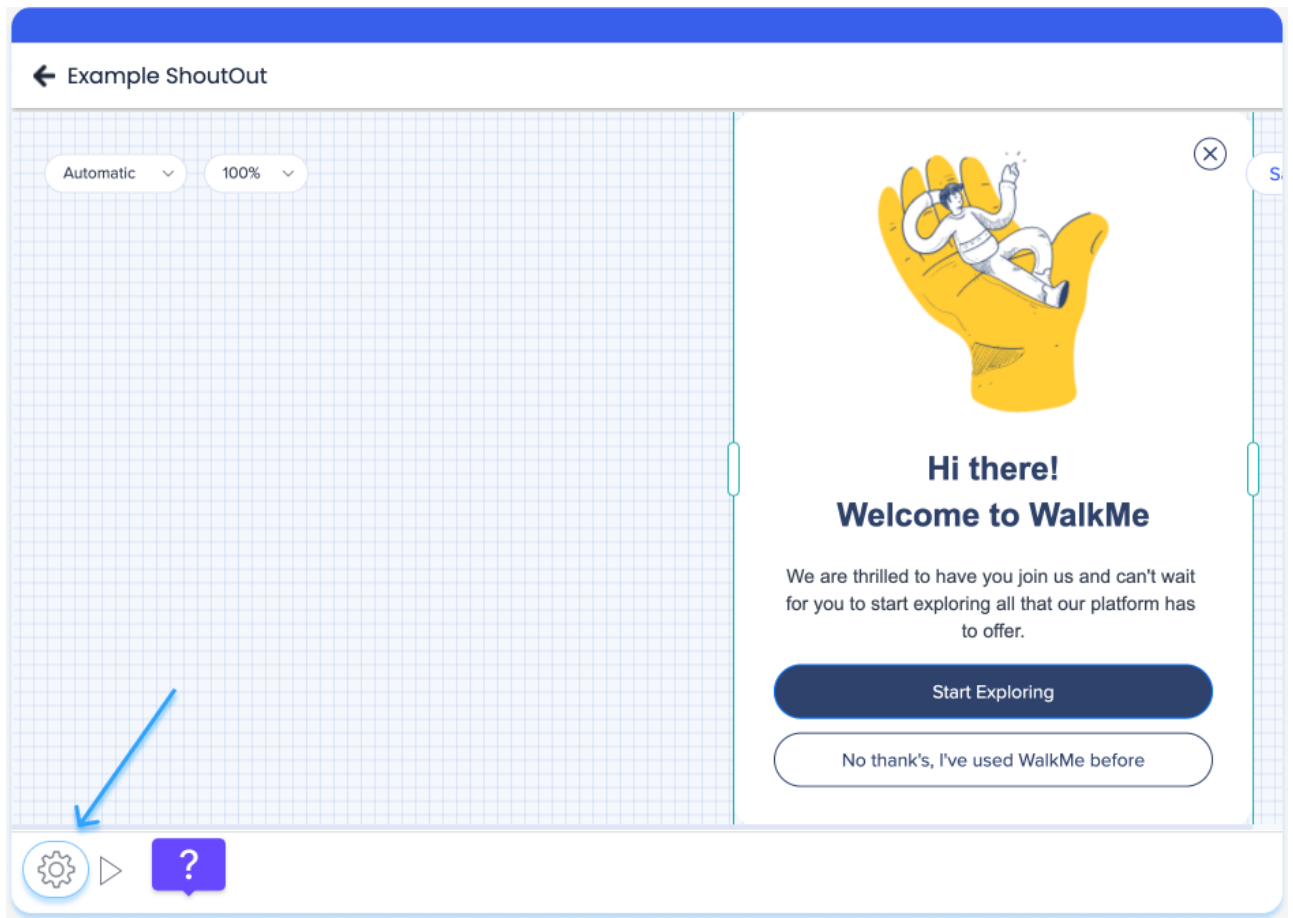
Active Directory Segmentation

Supported since Version 3 for Windows

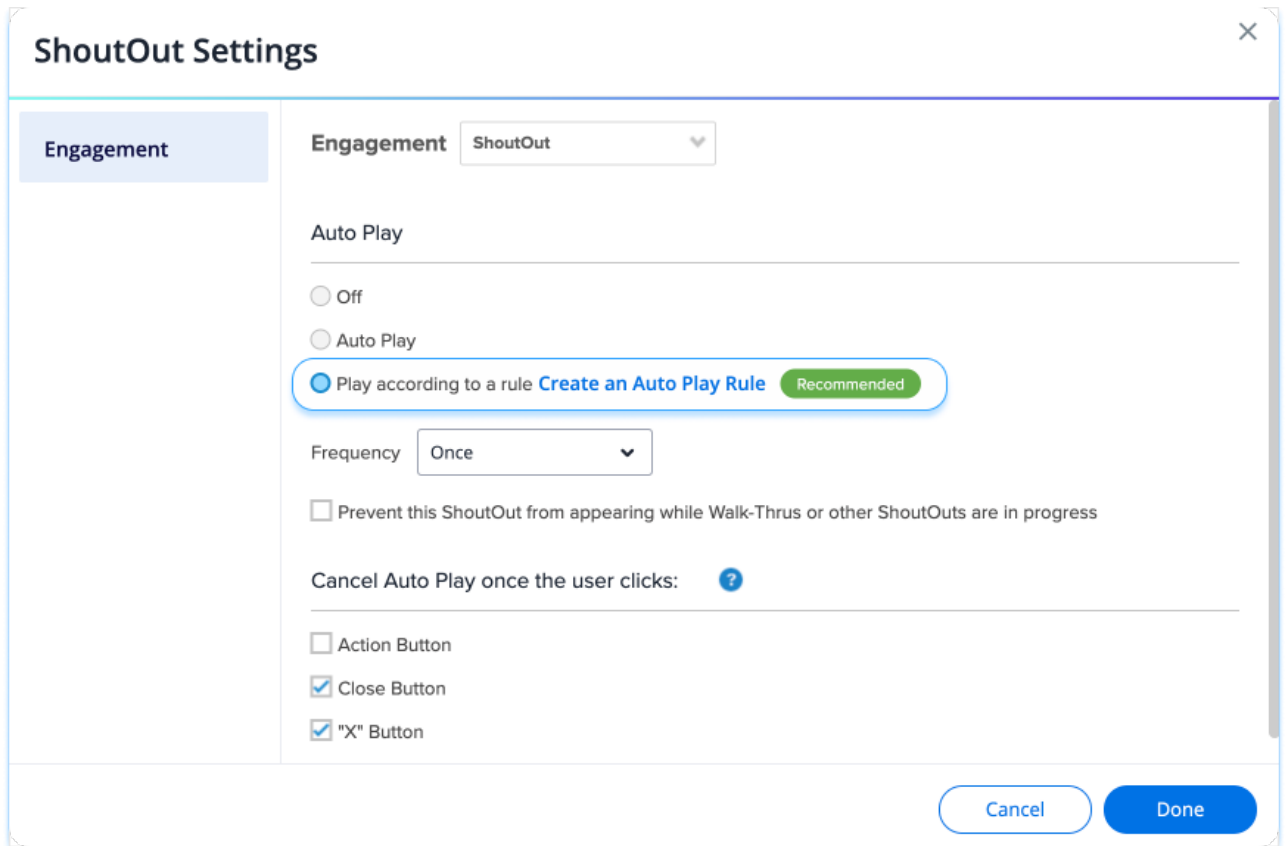
WalkMe Desktop allows segmentation using active directory.

Example: Using Active Directory Segmentation on ShoutOuts

1. Open your ShoutOut and click on the **Settings** icon



2. In the Engagement tab, select **Play according to a rule**



ShoutOut Settings

Engagement ShoutOut

Auto Play

☐ Off

☐ Auto Play

☒ Play according to a rule [Create an Auto Play Rule](#) Recommended

Frequency: Once

☐ Prevent this ShoutOut from appearing while Walk-Thrus or other ShoutOuts are in progress

Cancel Auto Play once the user clicks: ?

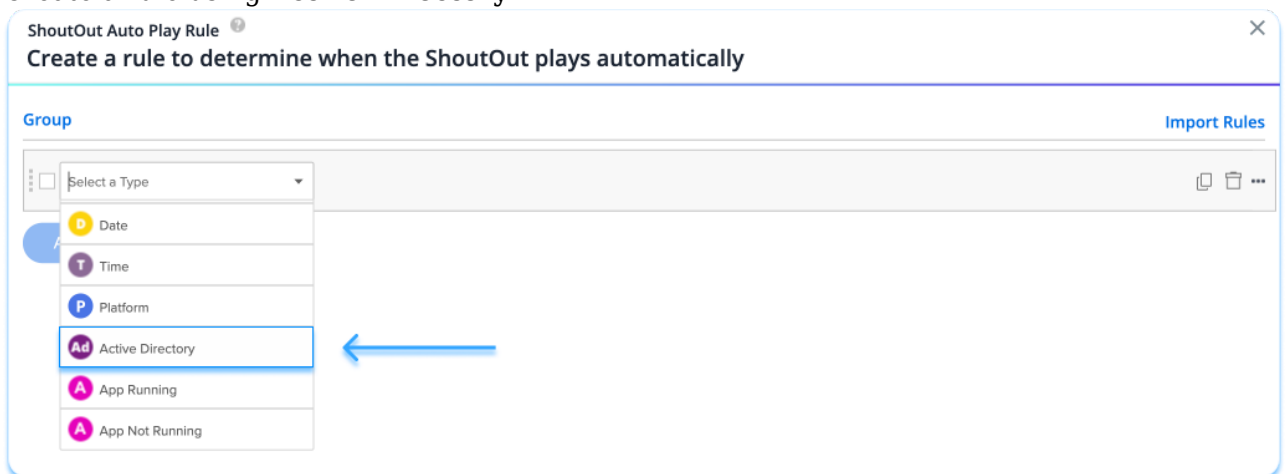
☐ Action Button

☒ Close Button

☒ "X" Button

[Cancel](#) [Done](#)

3. Create a rule using **Active Directory**



ShoutOut Auto Play Rule

Create a rule to determine when the ShoutOut plays automatically

Group [Import Rules](#)

Select a Type

- Date
- Time
- Platform
- Active Directory**
- App Running
- App Not Running

When using **Active Directory** users are assigned to Security Groups and Organizational Units (OU).

This system allows you to create a rule either by the user's assignment to an OU ("User is / (Not) under OU") or user's belonging to a group ("User Member / (Not Member) of Group").

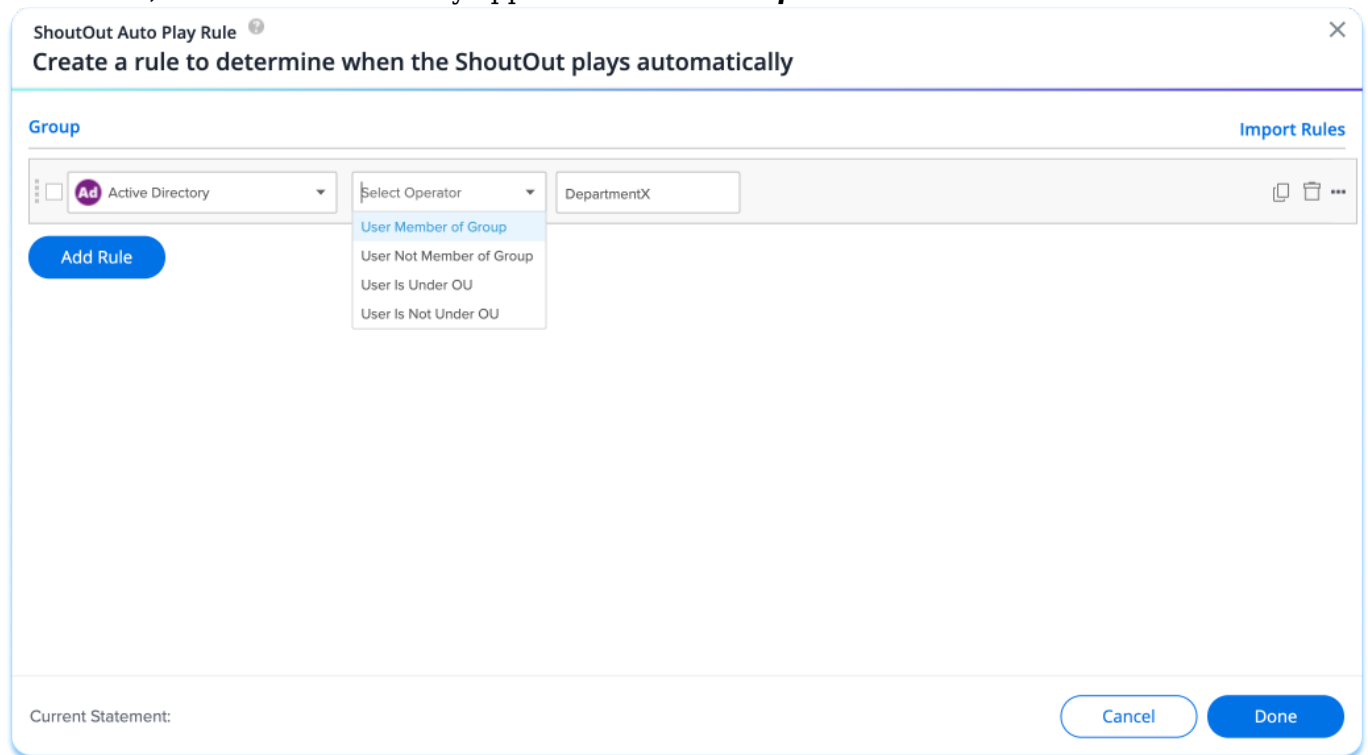
For example, A user in 'DepartmentX' may be assigned to the following groups:

- Domain Users

- Everyone
- NY-Office

To segment a ShoutOut for this user, you should create an **Active Directory** rule type, choose **User Member of Group** as a condition, and enter **DepartmentX** in the variable field.

As a result, the ShoutOut will only appear for users in **DepartmentX**.



ShoutOut Auto Play Rule

Create a rule to determine when the ShoutOut plays automatically

Group Import Rules

Active Directory Select Operator DepartmentX

User Member of Group

User Not Member of Group

User Is Under OU

User Is Not Under OU

Add Rule

Current Statement: Cancel Done

Note

To assign users to groups and organizational structure in Active Directory, please contact your IT department.

Segmentation with IDP

Segmentation is also available using IDP data. Before this can be enabled an integration must be configured from Insights to your chosen system. After this is completed, please contact your Customer Success Manager or WalkMe contact to have it enabled.

[IDP Integration](#)