

Segmentation

Brief Overview

Segmentation allows you to decide when to display your WalkMe content to your users using different “use cases”. You can push items to specific users, or remove items from a user’s view according to the segmentation rules you define.

Purposeful segmentation is an important part of your builds. 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 WalkMe Menu.

□ Digital Adoption Institute

- View the [Segmentation](#) course in the *Technical Configuration* curriculum
- Don’t have a DAI account yet? [Sign up here](#)

How It Works

WalkMe offers two types of segmentation. The first method involves modifying the **display conditions** of a particular WalkMe item, which only impacts that specific item. The second method involves creating a **segment** and assigning multiple WalkMe items to it. All the items assigned to the segment will automatically display based on the conditions defined.

Before any of the items that have been segmented using display conditions or a segment appear in the menu or on the screen, WalkMe will evaluate and check if the associated rule is true.

Display conditions and segment rules can be created with any of the available conditions from the rule engine. For example, you can create a segment to organize and filter your WalkMe items by variable, date, on-screen element, or even by URL.

Most apps in the editor can be segmented to appear for target audiences: Smart Walk-Thrus, Launchers, resources, shuttles, surveys, SmartTip sets, and ShoutOuts.

Note

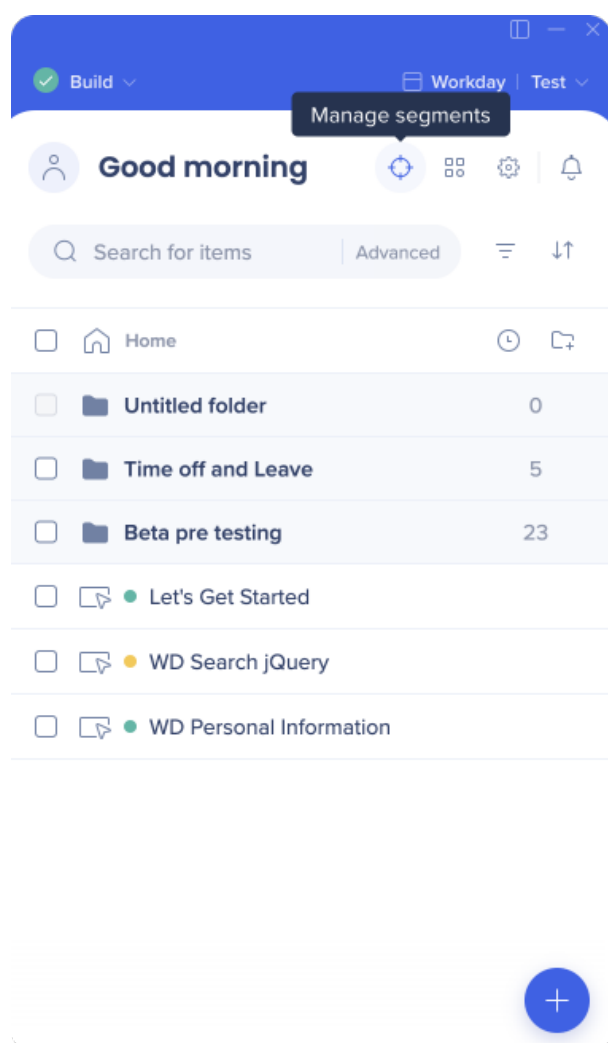
- Help Desk and Live Chat integrations cannot be segmented
- Items with no display conditions or segments will always attempt to appear

Creating Segments

To begin, click the **Manage segments** target icon.

You can create as many segments as you would like, and assign as many WalkMe items to those segments as needed.

Your segments will be listed here automatically in alphabetical order.



Tip

Create segments for conditions that multiple WalkMe items are likely to repeat.

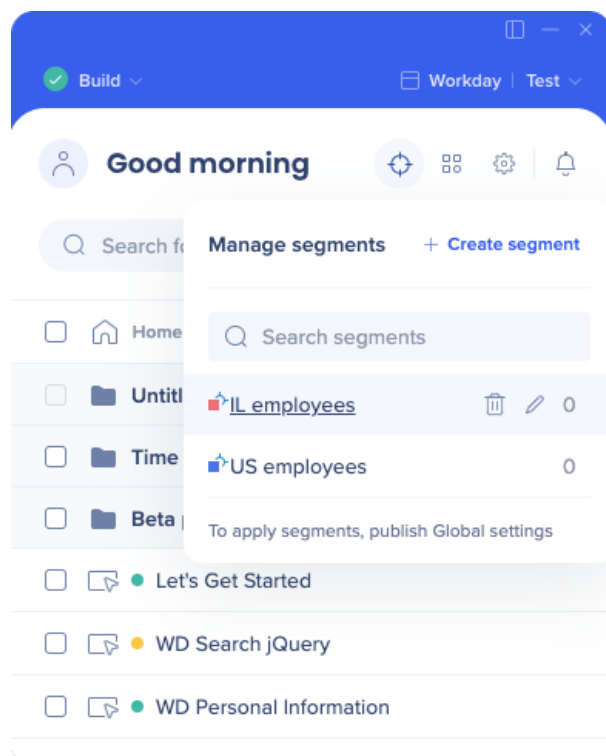
Note

- When the same WalkMe item is added to multiple segments, the segments will be evaluated with an **OR** relationship; this means that the item to which the segments are applied will appear if **ANY** of the applied segments evaluate as true
- Once you assign, remove, or make any changes to a segment, you must **Publish Global Settings** for the changes to take effect

Defining New Segments

Segments can be created in the **Manage segments** menu, and afterwards relevant items can be added to that segment.

Once a segment is created you can add a rule to define the use case by clicking on the **target** icon.



Any rule type can be used to define a segment.

Segmentation ⓘ

×

Create a rule to define this Segment

Segment Title:

Group Import Rules

☐

U URL

Current URL

Contains

☐
☐
☐

Add Rule

This rule will only display segmented items if the current URL contains that text “vipuser”

Save as a Segment

Click the **Save as a Segment** button, to save a rule you created as a segment for later use.

Launcher Display condition ⓘ

×

Create a rule to determine when the Launcher displays

Group Import Rules

☐

U URL

Current URL

Contains

☐
☐
☐

Add Rule

Current Statement: Waiting Run Time: 0ms

Save as Segment

Cancel

Done

Creating a Segment Based on User Activity Data

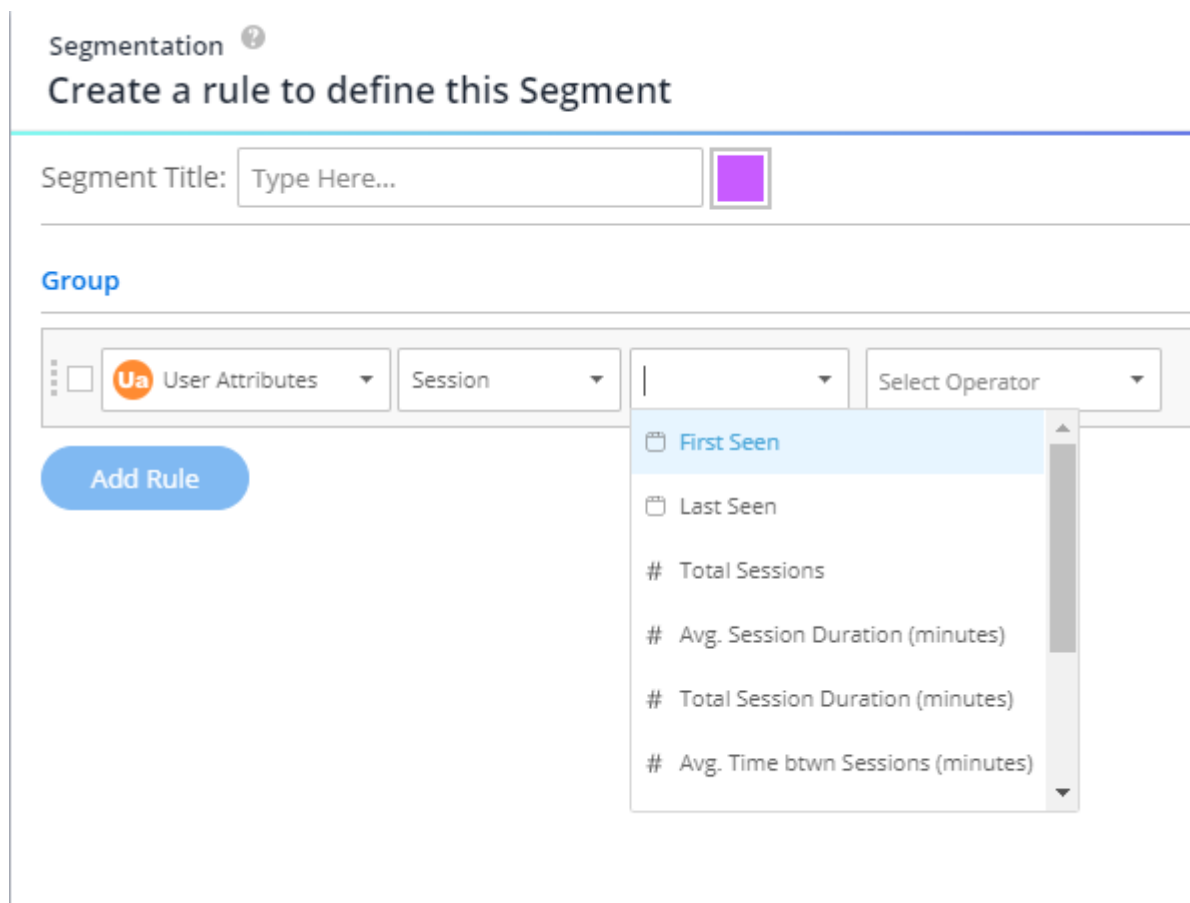
In order to create a segment based on user activity data, choose the “User Attributes/Session” category.

These are the rules that will be available:

- First seen
- Last seen
- Number of total sessions
- Average total session duration in minutes
- Average time between sessions in minutes

Note

Evaluate conditions in preview should work ~1-2 minutes after the first preview.



Segmentation ?

Create a rule to define this Segment

Segment Title:

Group

☐ **Ua** User Attributes |

Add Rule

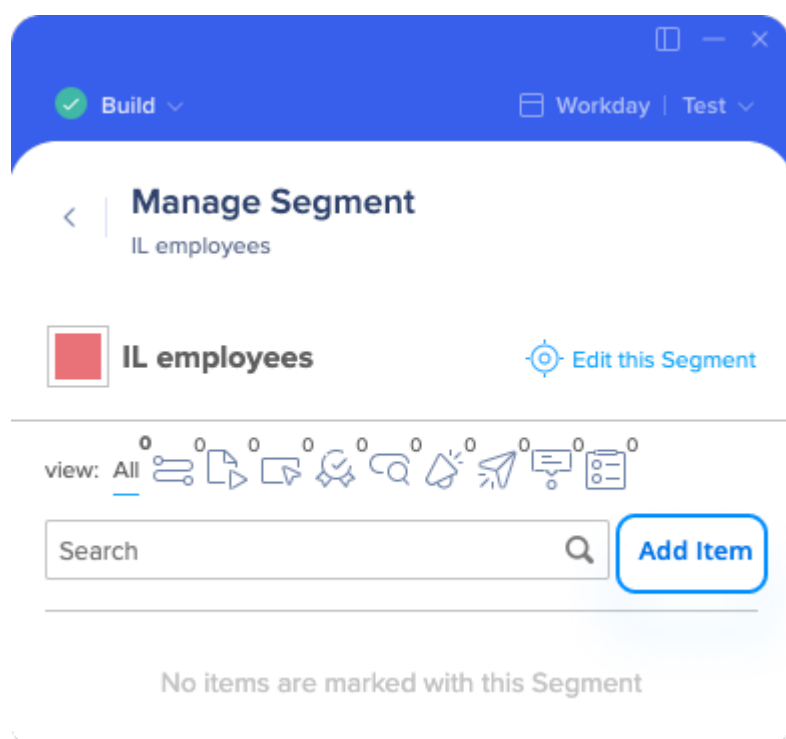
- ☐ First Seen
- ☐ Last Seen
- # Total Sessions
- # Avg. Session Duration (minutes)
- # Total Session Duration (minutes)
- # Avg. Time btwn Sessions (minutes)

Segmenting WalkMe Items

There are four ways you can add WalkMe items to a segment.

1. Segment Management menu

1. Click on your segment
2. Hover over the list of items
3. Click **Add Item**
4. Continue adding all your WalkMe items to the segment and click **Done** to view the segment and all the items added to it

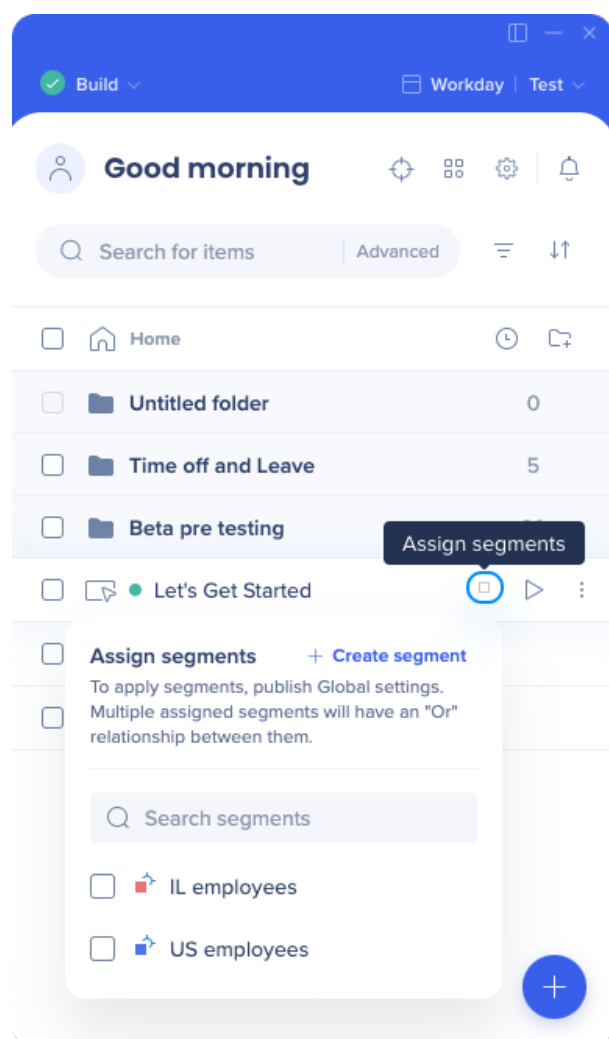


2. Editor list

1. Click the **Assign segments** square icon next to the item name
2. A menu will open containing all available segments
3. Check the segments you want to assign
4. Click **Done**

Note

All assigned segments will appear at the top of the list



3. Item settings

1. Click the **Assign Segments** button in the **Display condition** tab of the item settings
2. A menu will appear containing all available segments
3. Select the segments you want to assign
4. Click **Done**

Note

- All assigned segments will appear at the top of the list
- Assigning segments from the item settings is not supported for ShoutOuts and Surveys

Untitled Launcher 1

Launcher Options ?

Assist Me

X

Interaction

Display condition

Appearance



Selected Element

Notes

Display condition

Determine the conditions under which your item will appear on a specific page.

[Create a rule](#)

  Constantly check the condition to decide whether to remove the item.

Segmentation ⓘ

Display the Launcher only to a target audience by applying a segment.

[Assign segments \(0\)](#)

Edit on Page

View Launcher

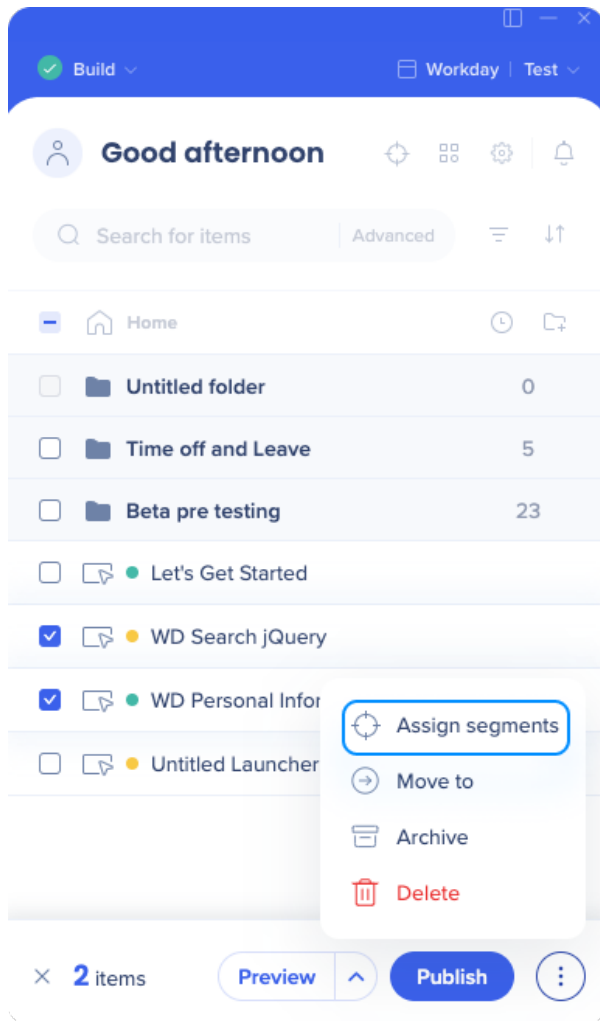
Re-select element

Cancel

Save

4. Bulk Segmentation

1. Click the square icon next to the item name in the editor
2. Select all the items you want to segment
3. Click on the 3 dot options menu in the bottom right of the editor
4. Click **Assign segments**
5. A menu will appear containing all available segments
6. Check the segments you want to assign
7. Click **Done**



Editing Existing Segments

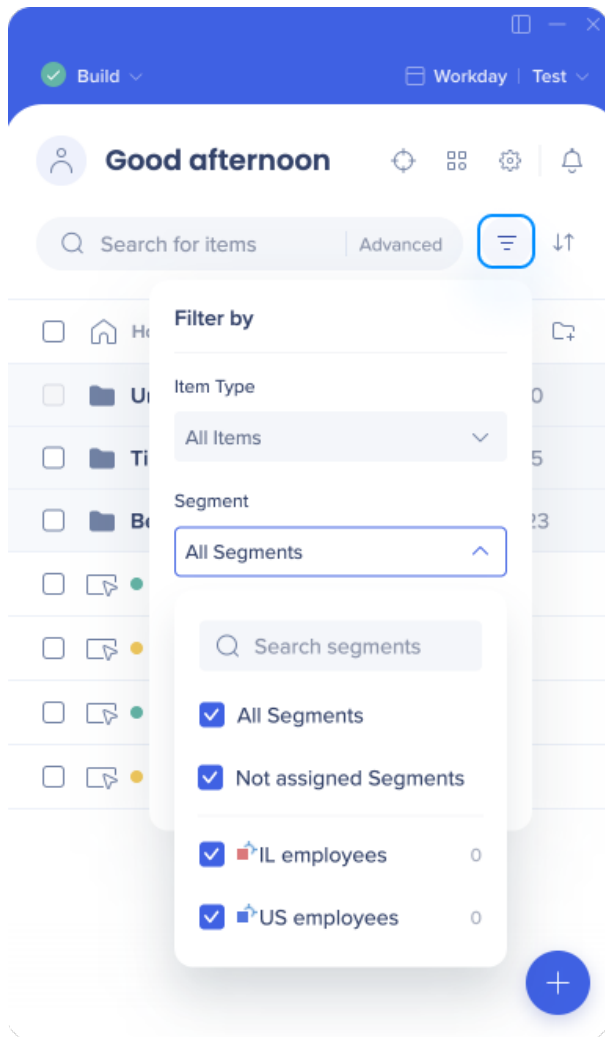
The name and color of a segment can be changed by clicking the pencil icon within the **Manage segments** menu. You can also edit a segment's rule anytime by clicking the **target** icon. Items can be removed from a segment by hovering over the item and clicking **Remove**.

Filtering Based on Segments

After creating your segments, you can filter existing items in the editor by clicking the **Filter** icon and checking the segments you want to view.

Note

This is for editor organization and will not affect the user's view.



Display Condition Segmentation

The second form of segmentation that can be applied to your WalkMe items is by adjusting the display condition of a specific WalkMe item, such as a Launcher, SmartTip, or Smart Walk-Thru.

This should be used when only **ONE** specific item has certain conditions under which it should appear. Display conditions can be found in the **Display Condition** tab of an individual items settings.

Advanced Segmentation

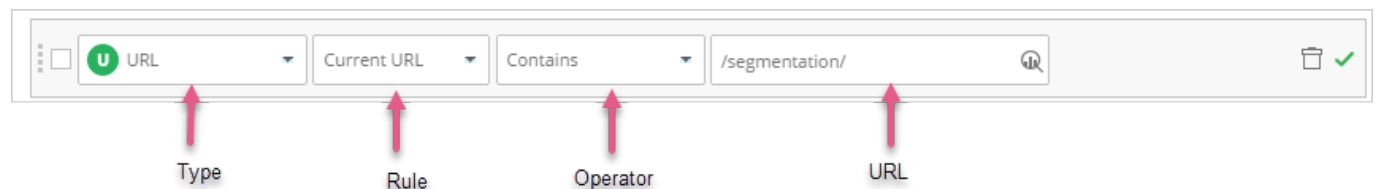
Using Grouping and Multiple Rule Statements

Grouping statements together and using multiple rule statements relies on understanding the rule

engine engine.

URL

Rules that are based on URLs are ideal for identifying specific pages on which a WalkMe item should appear.



Tip

- URL-based display conditions are especially useful with Launchers when it should only appear on a specific page
- This type of rule can also be used with Resources to limit articles and videos from appearing where they are not relevant

User Variables

[User Variables](#) are the most widely used and versatile rule type when creating segments. Depending on its configuration, a variable can store information about a user's role, access level, and even time within the organization. Variable names and values must be configured within your environment and can then be read by WalkMe to segment items.

Tip

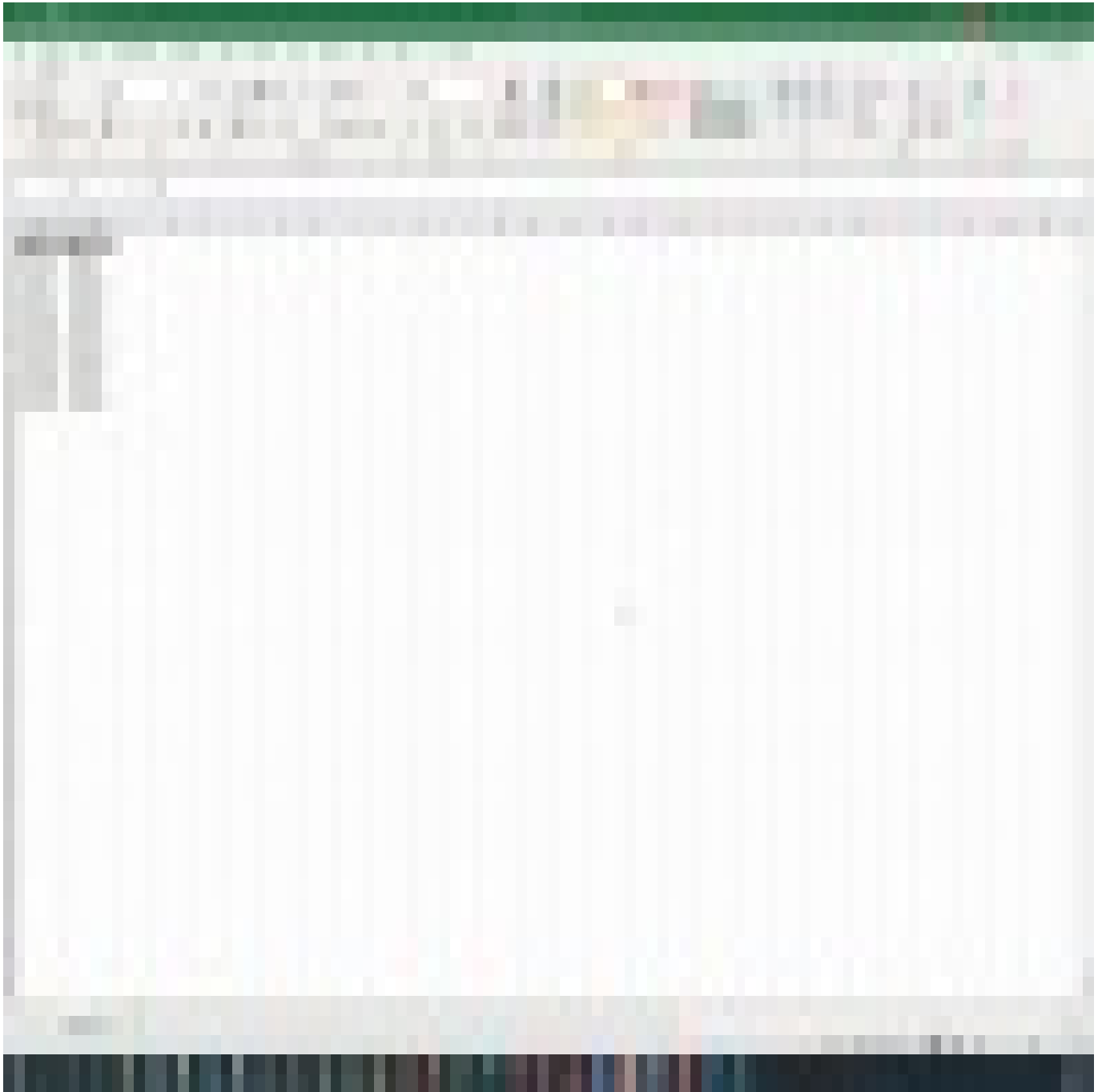
A Variable can also track individual users for Onboarding, segmentation, and analytics purposes.

Tip Tuesday Videos

How to Filter Insights Data with User Attributes



How to Segment when Elements or HTML are not Available





WalkMe Community

[Join the conversation in the WalkMe World Community!](#)