

Segmentation

Brief Overview

Segmentation allows you to decide when to display your WalkMe content to your users using different "use cases" and to push items to specific users or to remove items from a user's view according to the segmentation you choose.

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 Player Menu.

WalkMe provides two forms of segmentation, the first, is by adjusting the Display Conditions of a specific WalkMe Deployable, this kind of segmentation will only affect that specific WalkMe Item. The second is by creating a Segment, and assigning as many WalkMe deployables as necessary to that Segment, all the WalkMe deployables that have been assigned to that Segment will automatically display according to that Segments defined conditions.

How It Works

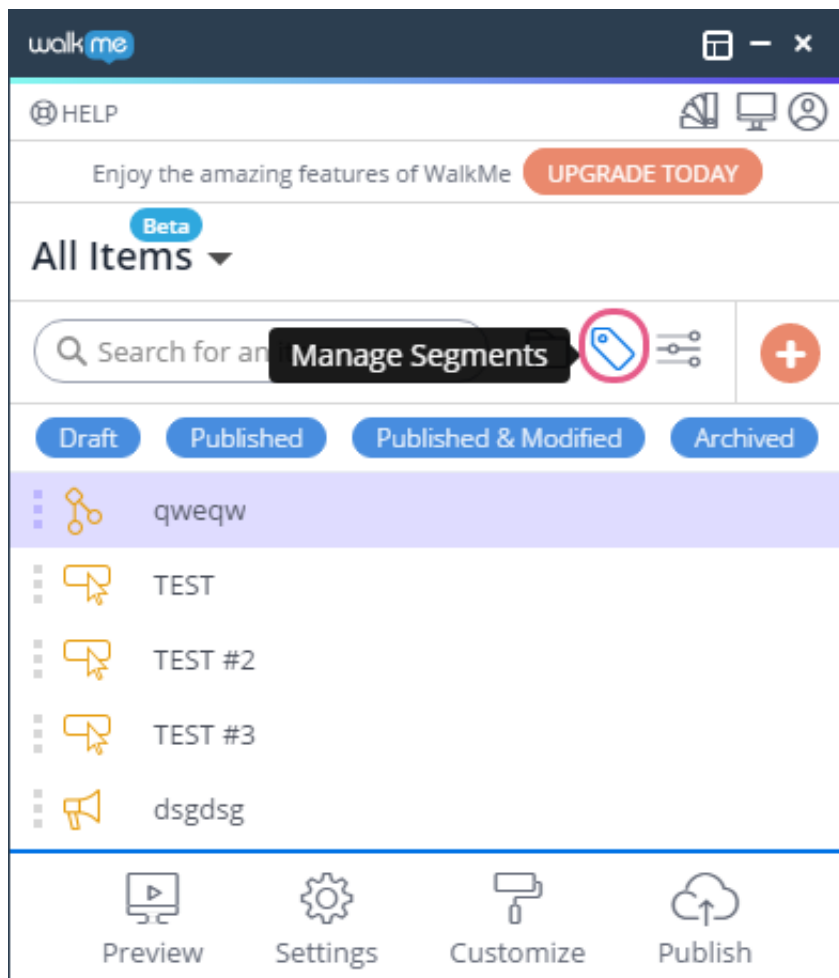
Before any of the items that have been segmented using Display Conditions or a Segment appear in the Player Menu or on the screen, WalkMe will evaluate that the associated rule is true. Any rule type can be used to create segmentation.

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, Smart Tip Sets, and ShoutOuts. Help Desk and Live Chat cannot be segmented.

Items with no Display Conditions or a Segment will always attempt to appear.

Creating Segments



Open the Manage Segments menu by clicking the tag icon (see above).

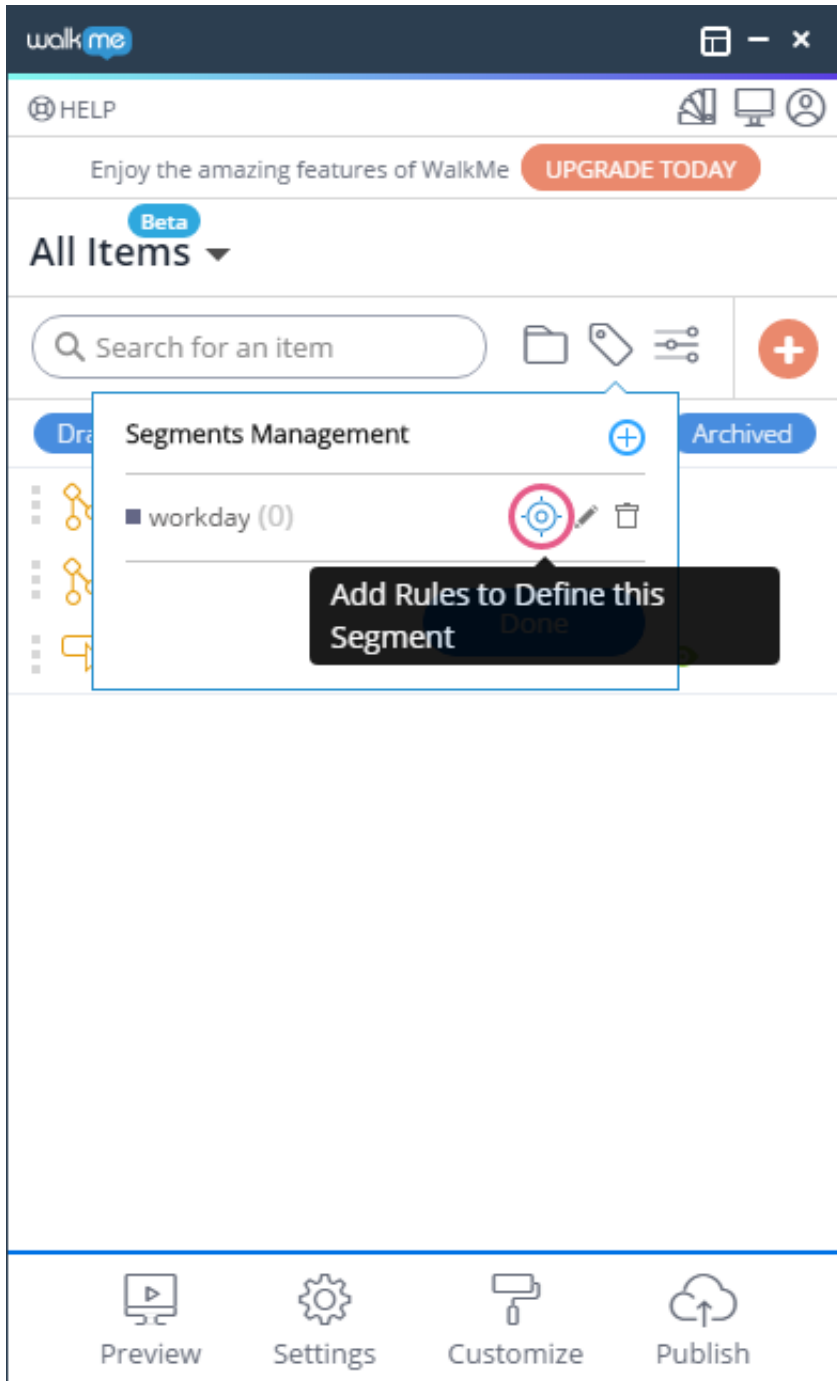
Here you can create as many Segments as you wish and you can later assign as many WalkMe deployables to those Segments. Create these Segments for conditions that multiple WalkMe items are likely to repeat.

Important: 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.

Defining New Segments

The Segment is first created in the Segments Management menu and then relevant items can be added to that Segment.

After creating a Segment you can create a rule to define that Segments use case.



Any rule type can be used to define a Segment. In the following example, the rule created will only display the associated WalkMe Item if the current URL contains that specific text:

Segmentation ? ×

Create a rule to define this Segment

Group Import Rules

☰ U URL ▼ Current URL ▼ Contains ▼ support.walkme 🔍 🗑️ ✓

Add Rule

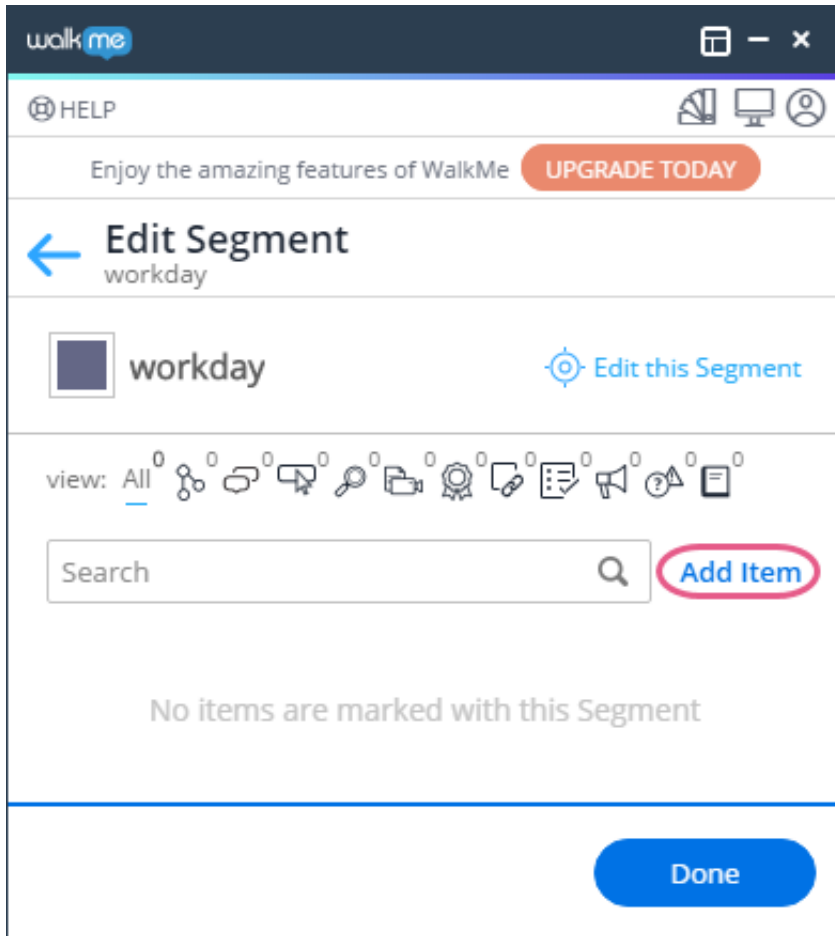
Current Statement: True Run Time: 0ms Cancel Done

Adding Items to Segments

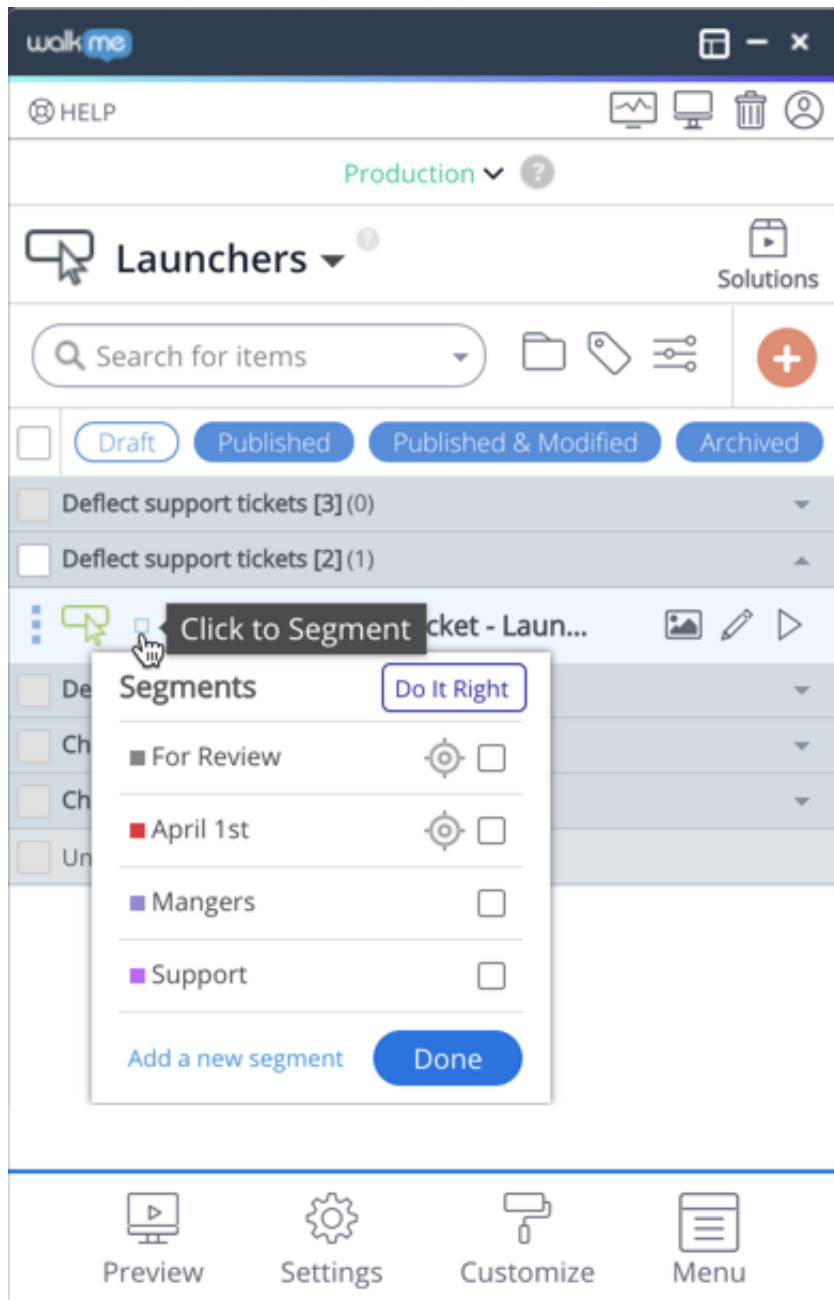
There are two ways you can add WalkMe Items to a Segment:

The first way, within the Segments Management menu, click on your desired Segment, here you have the option to add WalkMe Items to this Segment by hovering over the list of items and clicking Add.

Once you are finished adding all your desired WalkMe items to the Segment, click Done to view the Segment and all associated items within.



The second way is done by clicking the tiny square icon next to the deployable name in the Editor. Once clicked, a drop-down menu will appear containing all available Segments, from there, simply check the desired Segment or Segments.

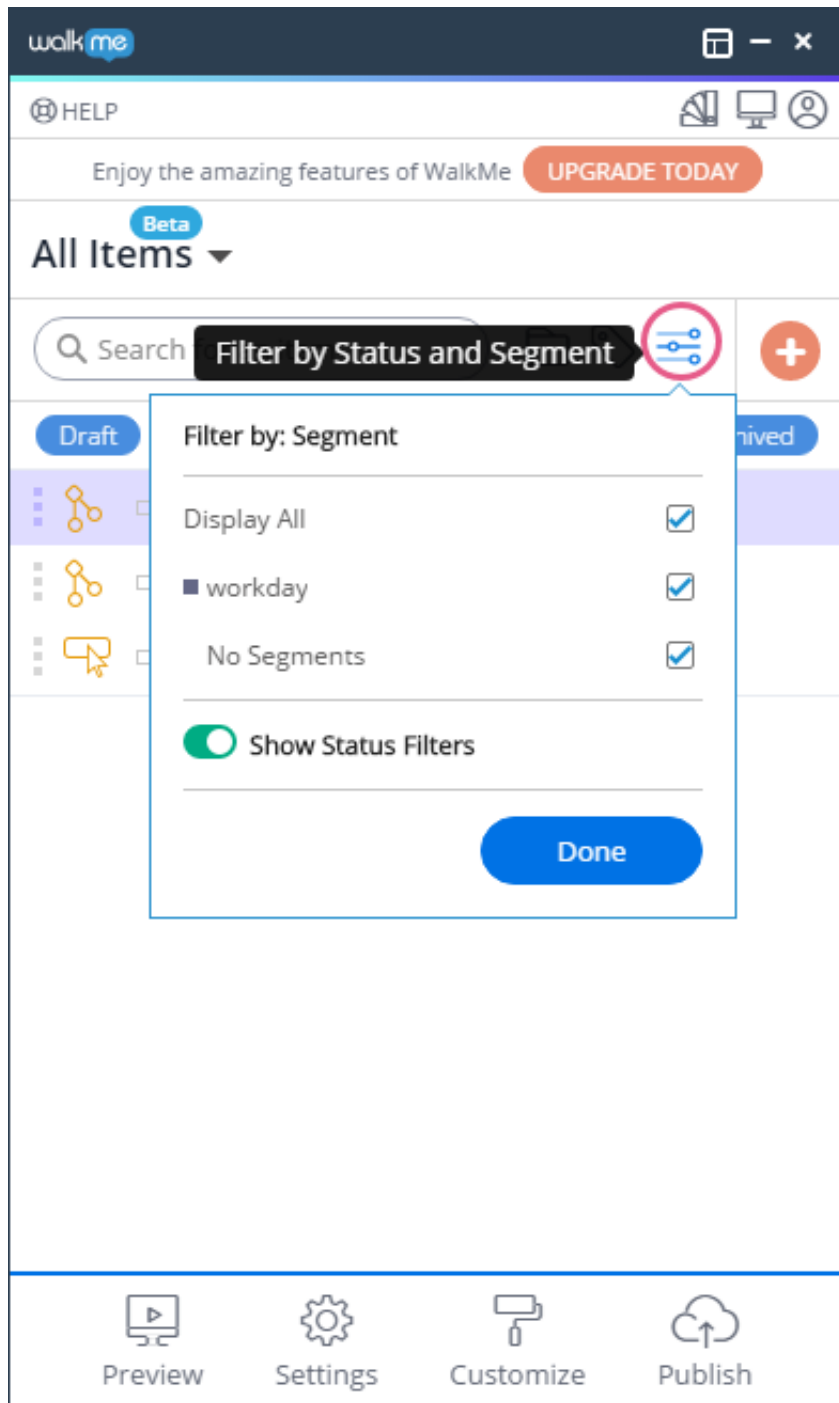


Editing Existing Segments

The name and color of a Segment can be changed by clicking the pencil icon within the Segments Management menu. 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. This will not affect the end-user's view.



Display Condition Segmentation

The second form of Segmentation that can be applied to your WalkMe deployables is by adjusting the Display Condition of a specific WalkMe Item e.g. Launcher, SmartTip, Smart Walk-Thru, etc.

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

under the Display Condition tab.

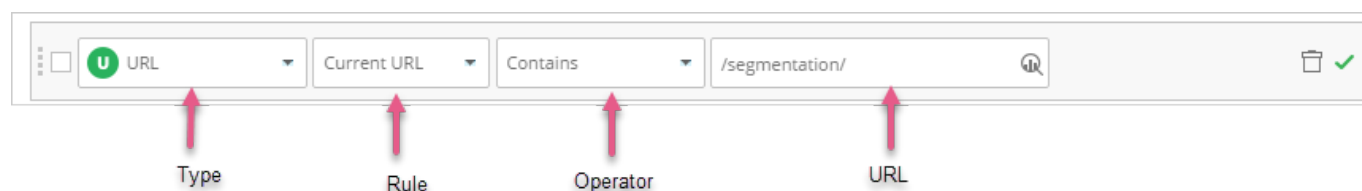
Advanced Segmentation

Using Grouping and Multiple Rule Statements

Grouping statements together and using multiple rule statements relies on understanding the Rule Engine. For more information, please visit the [Rule Engine article](#).

URL

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