

# Unique User Settings (UUID)

## Brief Overview

When building your WalkMe Solutions, consider how you would like to collect data about your end users. For example, when you look up progress or usage supports in Insights, would you like users to be identified by their email address, anonymous ID number, or a unique identifying element on their screen.

You can configure unique user settings so all your analytics will be collected in the same terms as the information on your own site. This provides a closer integration between WalkMe Insights and your own site by identifying users in the same way.

□ Digital Adoption Institute

- View the [Unique User Identifier \(UUID\)](#) course in the *Setting Up WalkMe* section
- Don't have a DAI account yet? [Sign up here](#)

## Use Cases

Some examples of what enabling unique user settings allows you to do include:

- Check an individual's progress and see that they are reaching their WalkMe goals
- Set up an onboarding task list that must be completed by each individual user
- Track the number of unique users that see WalkMe on a monthly basis
- Collect the email address of your WalkMe users
- Enable users to see onboarding tasks crossed off their onboarding list
- Configure Smart Walk-Thrus and ShoutOuts to play automatically

## How It Works

When you select a method for unique user settings, WalkMe will associate all user activity by this identifier. All engagement data from this individual user will be tracked by the identification method selected.

Unique user settings also affect the user experience. In order for WalkMe to track whether someone has played an item to cross it off on the Onboarding list, a method must be selected to collect

individual users (any method can be used, as long as it is **not** None).

Similarly, a method for unique user collection must be selected in order to use Auto Play with ShoutOuts and Smart Walk-Thrus.

The following options are available to set as a unique user identifier to track each end user's activity:

- **WalkMe ID:** Unique ID generated by WalkMe
- **Cookie:** Cookie stored on the user's browser
- **jQuery:** jQuery element using a jQuery selector
- **Variable:** Javascript variable on your site
- **Salesforce User ID:** Unique ID generated by Salesforce for each user
- **IDP:** Unique ID generated using Identity Provider Integration
- **None:** Unique users are not tracked

## Settings Breakdown

### IDP Integration

IDP (Identity Provider) Integration can be used to validate end-users identity, enrich content segmentation capabilities, and expand on user behavior monitoring. Providing one reliable and secure User ID across any system without the need of defining the unique user ID for each system with different variables.

#### [IDP Integration](#)

#### Recommended method

IDP is the most accurate and reliable way to identify end users, and when possible, it is the method recommended by WalkMe to use.

### WalkMe ID

By selecting WalkMe ID, WalkMe dynamically generates an ID to a user when they land on your page. The ID will look something like this: 05d44656-c904-e625-f55a-a333bae5d354.

Each user is assigned one of these unique identifiers and it is stored in the user's browser's cache as a cookie called wm-ueug. This method allows WalkMe to count the number of users that engage with

WalkMe and associate actions in WalkMe with a unique ID.

WalkMe ID is particularly useful for collecting large numbers of users, specifically for external sites. WalkMe ID is not ideal for internal sites where you want WalkMe to remember your user.

#### Disadvantages to using WalkMe ID

WalkMe ID is not associated with any personally identifying information and will not be able to reveal the identity of users in Insights, you will simply see a random string of numbers and letters. If a user logs in through another browser or clears their cache, WalkMe will no longer be able to identify them and will assign them a new ID.

#### Cookie

If you have configured your site with cookies, you can use the cookie to identify unique users. A cookie is a small piece of data sent from your site and stored in a user's cache in their web browser.

Your website code can place a cookie in the user's browser's cache and then WalkMe can use it to count and identify users. To use cookies, you will need to set up cookies on your site and supply the name of the cookie in the unique user settings in the editor.

#### [Storage Manager Overview](#)

#### Disadvantages to using cookies

If a user clears their cookies or uses a different browser, they will no longer be associated with that cookie and will show as a new user in Insights. Any Onboarding tasks they have completed will also be reset.

#### jQuery

jQuery can be used to track unique users if there is a unique element in your website's HTML for each user. If there is any element on the screen that we can use to identify the user, then we can use a simple jQuery selector to identify the relevant text and use it as the identifier.

For example, if a user's username appears on the screen, create a jQuery selector that will pull in

this value. All engagement data will be associated with this identifier allowing you to sort by username in Insights.

### [jQuery Selectors](#)

#### Disadvantage to using jQuery

The exact element selected will have to be present on every page of the website on which you are using WalkMe.

#### Variable

Many sites use JavaScript variables that correlate with a User ID or username. When a variable is selected in Unique User Settings, identify which variable for WalkMe to look for on your site. A variable is a storage location with a symbolic name (otherwise known as an identifier) which contains some quantity or value specific to each user. WalkMe will pull in the variable's value and use it to identify your end-user.

### [Variables](#)

#### Recommended method

When using IDP is not possible, variables are often the recommended method for user identifiers. The variable does not have to be present on each page (unlike jQuery) and will still be associated with the same individual even if the cache is cleared or a user accesses your site in another browser (unlike cookies).

#### Salesforce ID

The Salesforce ID user identifier will track users anonymously by their 18 digit Salesforce ID. Similar to a WalkMe ID, a Salesforce ID is a random number that cannot be associated with an individual and will not be able to provide as meaningful analytics.

## [Salesforce Variables](#)

### Disadvantage to using Salesforce ID

Salesforce ID is not associated with any personally identifying information and will not be able to reveal the identity of users in Insights. An alternative would be using the variable method and collection by `UserContext.userName` (usually the user's email address). Note that Salesforce ID must be enabled for Salesforce users.

### None

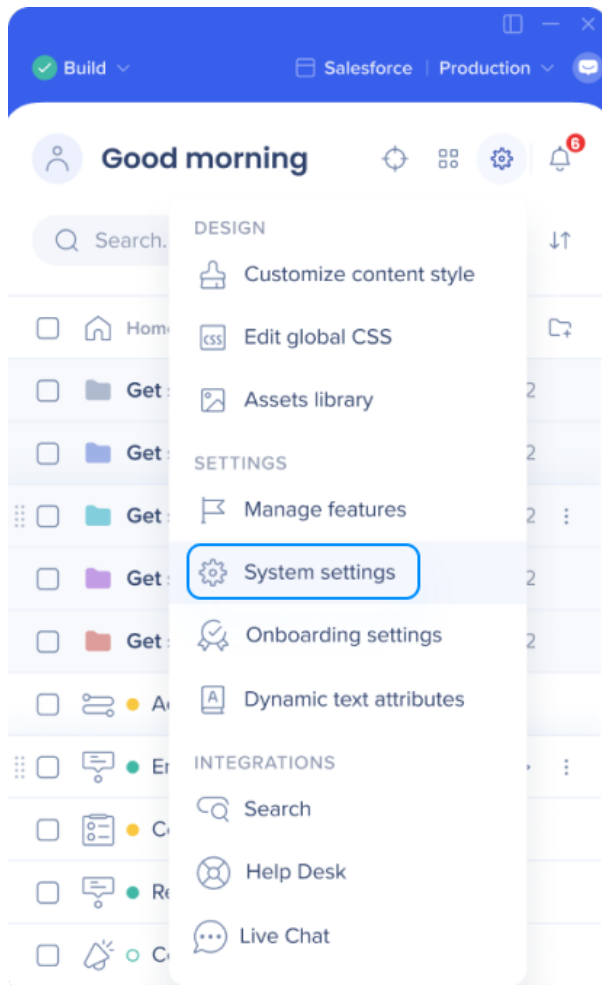
No unique identifier will be used to track user activity.

Not recommended

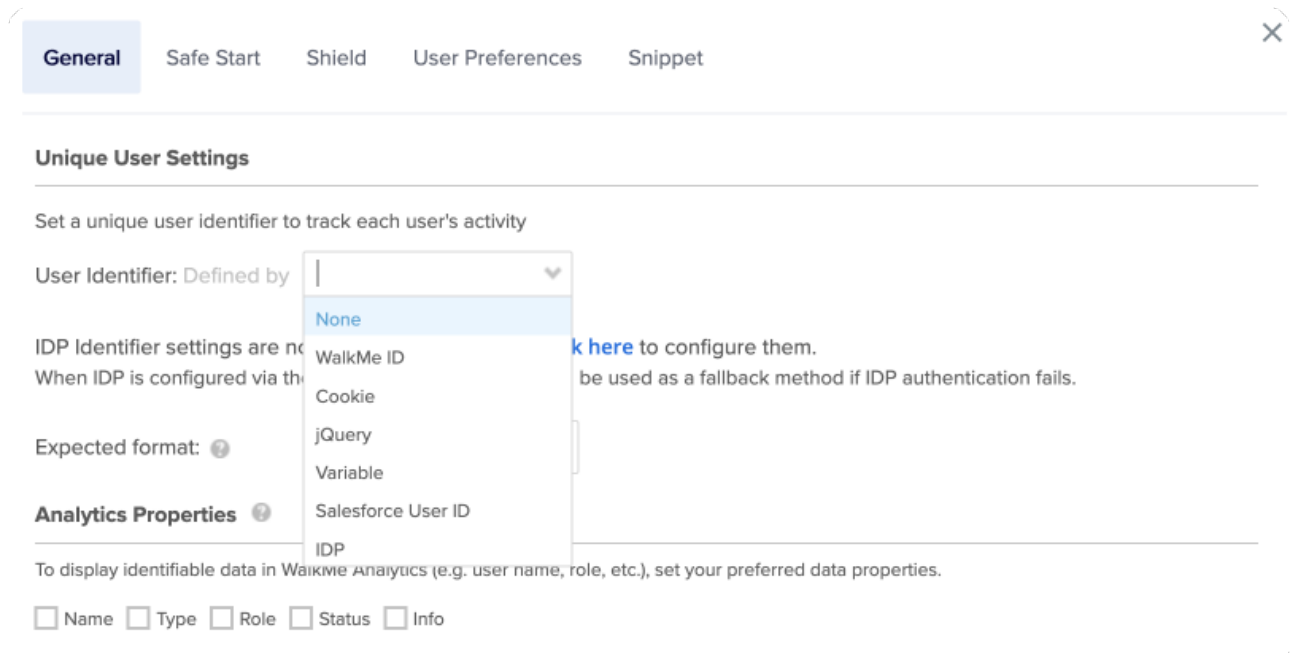
When none is selected as your user identifier, Onboarding tasks will not cross off, Auto Play cannot be used, and a new ID will be generated each time a new session begins.

## Configure Unique User Settings

1. Click on the **Settings** icon in the WalkMe Editor and select **System settings**



2. In the **General** tab, you will see **Unique User Settings**
3. Use the **User identifier** dropdown to select your chosen method



**General** Safe Start Shield User Preferences Snippet

**Unique User Settings**

Set a unique user identifier to track each user's activity

User Identifier: Defined by ▼

- None
- WalkMe ID
- Cookie
- jQuery
- Variable
- Salesforce User ID
- IDP

IDP Identifier settings are not available. [Click here](#) to configure them.

When IDP is configured via the IDP, the IDP identifier will be used as a fallback method if IDP authentication fails.

Expected format: ?

**Analytics Properties** ?

To display identifiable data in WalkMe Analytics (e.g. user name, role, etc.), set your preferred data properties.

☐ Name ☐ Type ☐ Role ☐ Status ☐ Info

4. Supply any additional information needed if you have chosen Cookie, jQuery, or Variable
5. Click **Save**

#### Tip

After a couple of weeks, check out your Insights to pull reports and track your users progress and goal completion.

## User Identifier Expected Format

In order to validate that the right value is being pulled for each user, it is recommended that you define the expected format of your user identifier.

Use the **Expected format** dropdown to select your format.

A format can be an email address, GUID, Integer, or any other custom format which can be defined by using a regular expression. When choosing the **Custom Regexp** option, an additional box will allow inserting a regular expression.

Expected format: ?

**Analytics Properties** ?

To display identifiable data in WalkMe (e.g., name, role, etc.), set

☐ Name ☐ Type ☐ Role ☐

**Attributes**

[Manage Attributes](#)

Email

None

Email

GUID

Integer

Custom Regexp

## Technical Notes

- The end user identifier character limit is 45, anything over that will be truncated
- End user identifiers are case sensitive
  - For example, the user [david@walkme.com](#) and [DAVID@WALKME.COM](#) will be counted as 2 different users
- Only one user identifier method can be chosen at a time

### Changing the user identifier method

Before changing the user identifier, be aware that it impacts the way WalkMe identifies end-users and may reset “Play once” configurations. This could result in resetting Auto Play rules and having users see their previously completed Onboarding Tasks as incomplete. There is no way around this limitation, as each user is being recognized as a new user, tied to their new UUID value.

## User Identifier Validation

Once an expected format is defined, saved, and published, WalkMe will tag any new user data with a Valid/Invalid attribute, which can be later used for filtering user’s data on WalkMe’s analytics

New Filter CLOSE X

Session Filters:

☐ User Identifier

is Valid

is Invalid

platform, Insights.

[Insights: Getting Started Guide](#)