

Insights Unique User Settings

Brief Overview

When building your WalkMe Solutions, consider how you would like to track 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. Configure Unique User Settings so all your analytics can be collected in the same terms as the information on your own site, providing a close integration between WalkMe Insights and your own site by identifying the user in the same way.

Use Cases

Some examples of what enabling Unique User Settings allows you to do include:

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

How It Works

The options for Unique User Settings are:

- WalkMe ID: Use a unique ID generated by WalkMe;
- Cookie: Use a cookie stored on the user's browser;
- jQuery: Use a jQuery element using a jQuery selector;
- Variable: Use a javascript variable on your site;
- Salesforce ID: Use the unique ID generated for each Salesforce user (Salesforce users only);
- None: Do not track unique users (Onboarding tasks will not cross off and [AutoPlay](#) cannot be used).



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, it has to have a method of tracking individual users (no matter which method is used, as long as it is not None).

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

When you select a method for Unique User Settings in the General tab of WalkMe 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. For non-Salesforce users we usually recommend using variables when possible. Only one option can be chosen at a time. Read about the different methods of unique user tracking, how they work, and why you would use each one below.

Settings Breakdown

WalkMe ID

Setting WalkMe ID is fast and easy; it can be configured by simply selecting WalkMe ID in the dropdown and it does not require you to provide any additional information. By selecting WalkMe ID, WalkMe dynamically generates an ID to a user when they land on your page. 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 tracking large numbers of users, specifically for external sites.

There are disadvantages to using the WalkMe ID as the Unique User Setting. First, it is not associated with any personally identifying information and will not be able to reveal the identity of users in Insights, simply a random string of numbers and letters. Furthermore, if the 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. Therefore, WalkMe ID is not ideal for internal sites where you want WalkMe to remember your user.

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 Unique User Settings.

A disadvantage to using cookies for unique user tracking is that if the user clears their cookies or uses a different browser, they will no longer be associated with that cookie. They will show as a new user in Insights and any Onboarding tasks they have completed will be



reset.

Read about [Cookies](#).

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 the user's username appears on the screen, create a jQuery selector that will pull in this value to be used with Unique User tracking. All engagement data will be associated with this identifier allowing you to sort by username in Insights.

A disadvantage of using jQuery for user tracking is that this exact element will have to be present on every page of your website on which you are using WalkMe. Learn how to set up a [jQuery Selector](#) to use in Unique User Settings.

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 are often the recommended method for unique user tracking when possible. 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).

Read about [Variables](#) to learn how to set up unique user settings based on a variable.

Salesforce ID

Salesforce ID is an enabled feature for Salesforce users. The Salesforce Identifier will track users anonymously by their 18 digit Salesforce ID. Similar to WalkMe ID, Salesforce ID is a random number that cannot be associated with an individual and will not be able to provide as meaningful analytics and therefore is not the top recommended method; rather we recommend using variable and tracking by `UserContext.userName` (which is usually the user's email address).

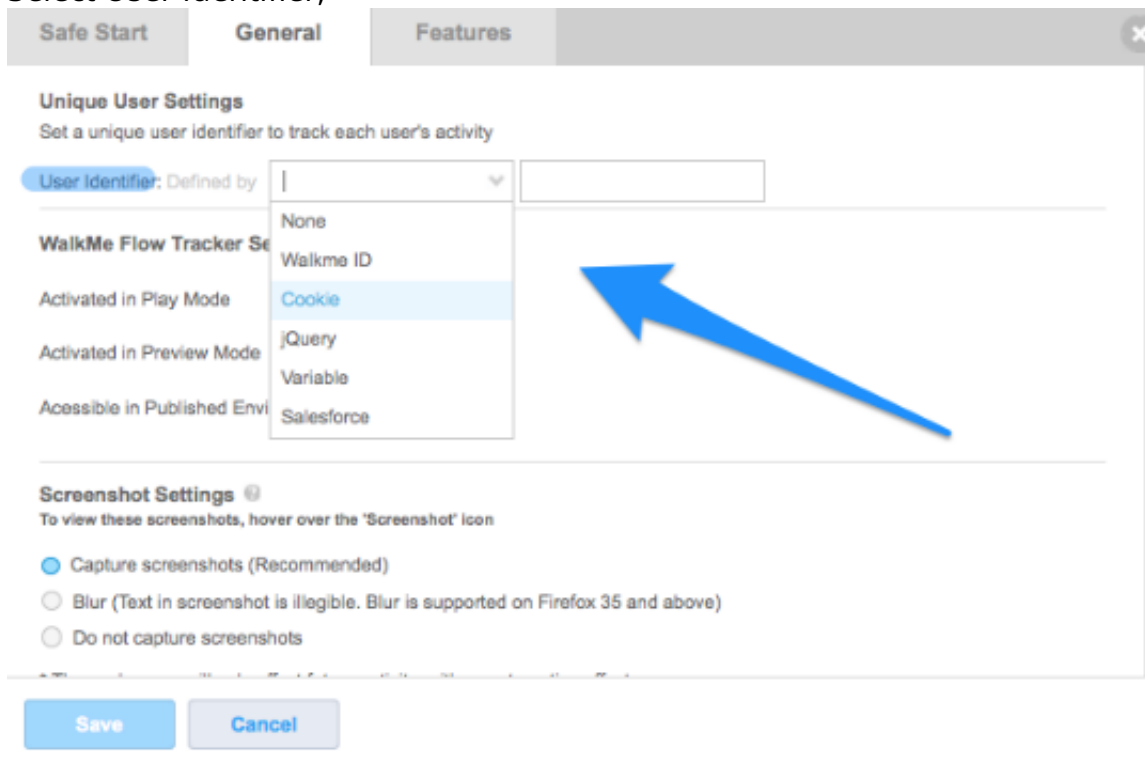
Read about using [Salesforce Variables](#).

Configure Unique User Settings

- Click Settings in the Admin Bar;



- Open the General tab;
- Select User Identifier;



- Supply additional information if selected Cookie, jQuery, or Variable;
- Click Save.

Try it Out

Identify a Variable, Cookie, or on-screen element that can be captured with a jQuery selector to use for Unique User tracking. If none of these can be used, select WalkMe ID or Salesforce ID (for Salesforce users). Set the setting in Settings in the General tab. After a couple of weeks, check out your Insights to pull reports and track an individual's progress and Goal completion.

Related Resources

- Read about [jQuery](#);
- Read about [Variables](#);



- Read about [Cookies](#);
- Read about [Salesforce Variables](#);
- Read about [Insights](#).