

Workday®: How to Create a Custom Worklet for Segmentation

Brief Overview

If you wish to segment content for a group that does not have a specific Worklet defined for their group, a solution is to create a custom Worklet for the group.

The following instructions will guide you through creating a custom report that will be surfaced via a Worklet, and only visible to a specific group (or even specific users) of your choosing.

The report will give you a Worklet ID to segment with, but will not create the actual Worklet visible for the group to use.

Steps for Creating a Custom Worklet for Segmentation

Step 1 — Search for the “Create Custom Report” task in the Workday® search

Step 2 — Fill out the required fields

- **Name:** Name it something specific to the security role and add “Walkme,” e.g. Walkme_HRAdmin_Worklet;
- **Report Type:** Use “Advanced”;
- **Data Source:** Many potential options here, but choose one that would be available to the group.
 - For example, “All Positions” is a strong option

Step 3 — Go to the “Output” tab and follow the below instructions

Step 4 — Add some report fields on the “Columns” tab. Fill in a Business Object, and at least one field

Step 5 — Click *Ok* to save

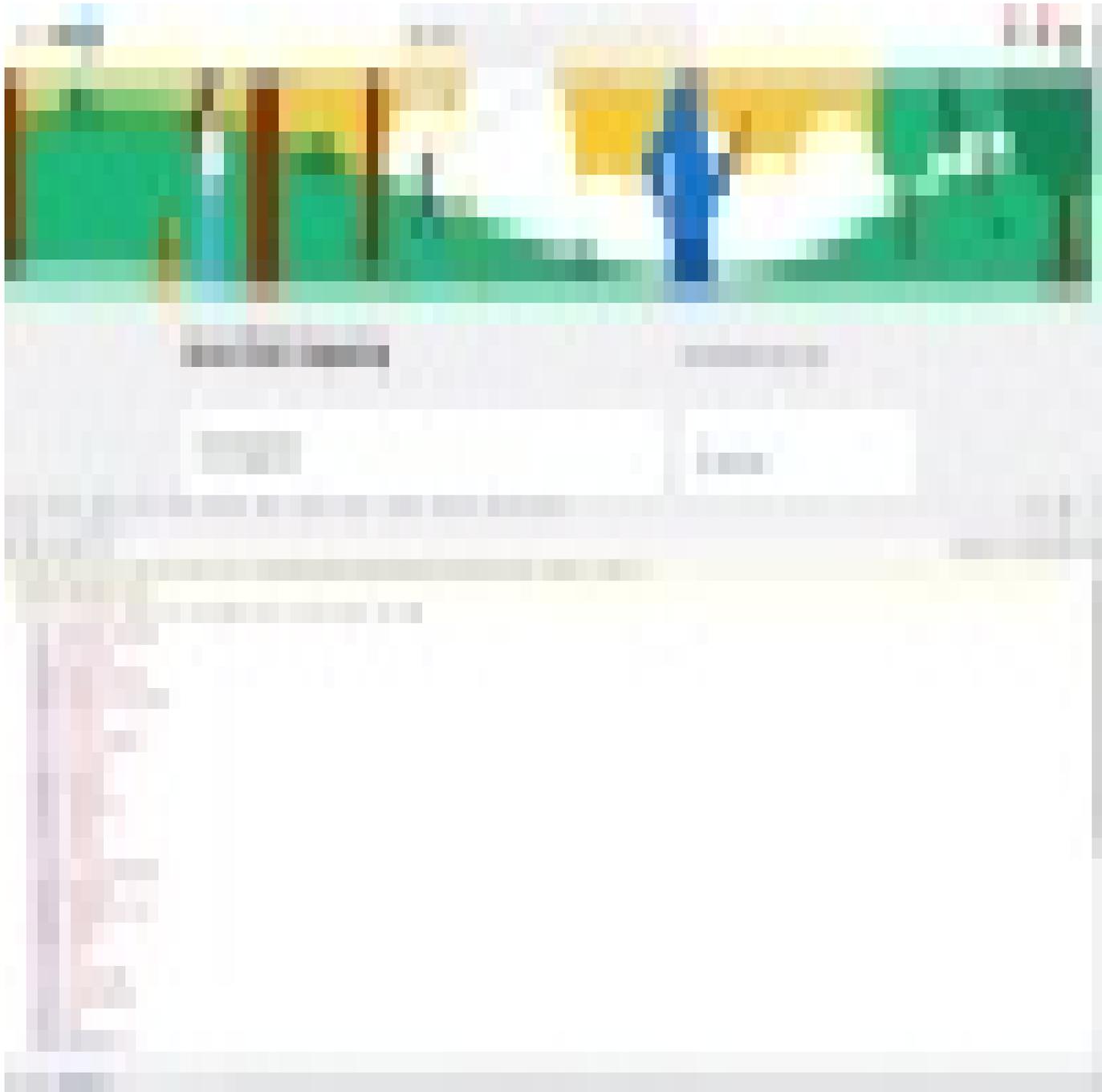
Step 6 — Refresh the page and with the Editor run the [walkMeWorkday.segmentation.worklets](#) console command

Step 7 — Confirm you find the Worklet name in the dropdown options. Use this ID in the Segmentation Engine.

```
1422$2354: "Learning Enrollment Status"  
1422$2383: "Headcount by Management Level"  
1422$2384: "Expense Item Trend"  
1422$2462: "Custom worklet tutorial"  
4297$520: "Security Groups Not Referenced in any Security Policy"  
4297$587: "Direct Reports Compensation Summary"  
4297$811: "Direct Reports Market Position"
```

Tip Tuesday Videos

Worklet Segmentation





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