

About the Workstation Widget

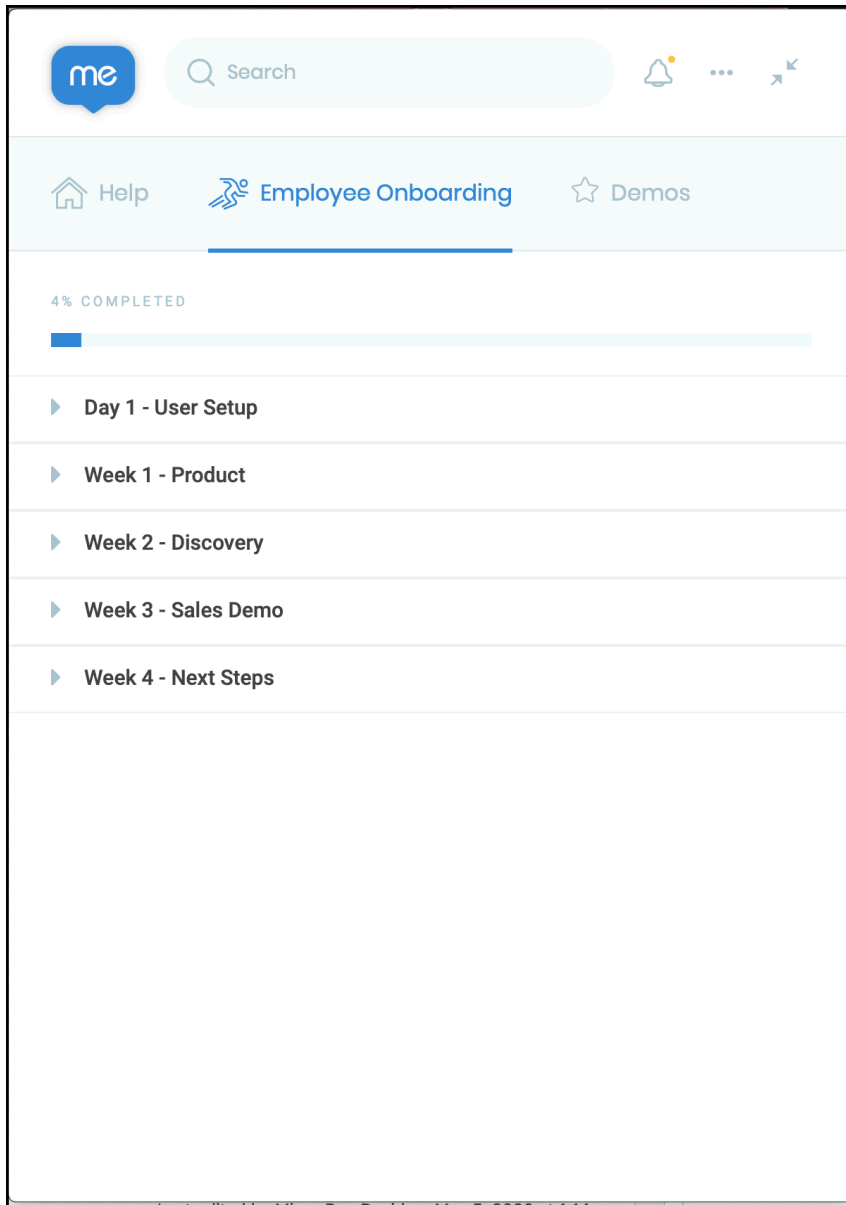
Brief Overview

The Workstation Widget is a multi-access tool, allowing users to play and integrate WalkMe features throughout your Desktop platform. Known as the Player Menu in WalkMe Web this tool allows WalkMe content to appear on the same menu for your users' easy access directly located on their Desktop.

With the Workstation Widget, guidance is always available. This allows your employees to start the process they need by using the search or navigating in a segmented menu that includes what they need most.

Terminology Note:

Menu refers to the list of tasks and content visible to your users. Widget refers to the icon that opens the Menu. Together, the Widget and Menu make up the WalkMe Player.



Use Cases

Some use cases for using the Workstation Widget are:

- Using the Menu as the starting point containing important processes for your employees.
- Using the search bar to allow your employees to search for the guidance they need.
- Creating a customized Notification Center, that can display notifications to users.
- Using segmentation to display dedicated content to different users.

Using the Workstation Widget

Users use the Widget to access your WalkMe content. Use the Customize Player tab to change the default appearance, style, and behavior of the widget. Use the Menu organizer tab to set tabs and folders for content items and tasks.

Please Note:

TeachMe is not currently supported in the Desktop Widget.

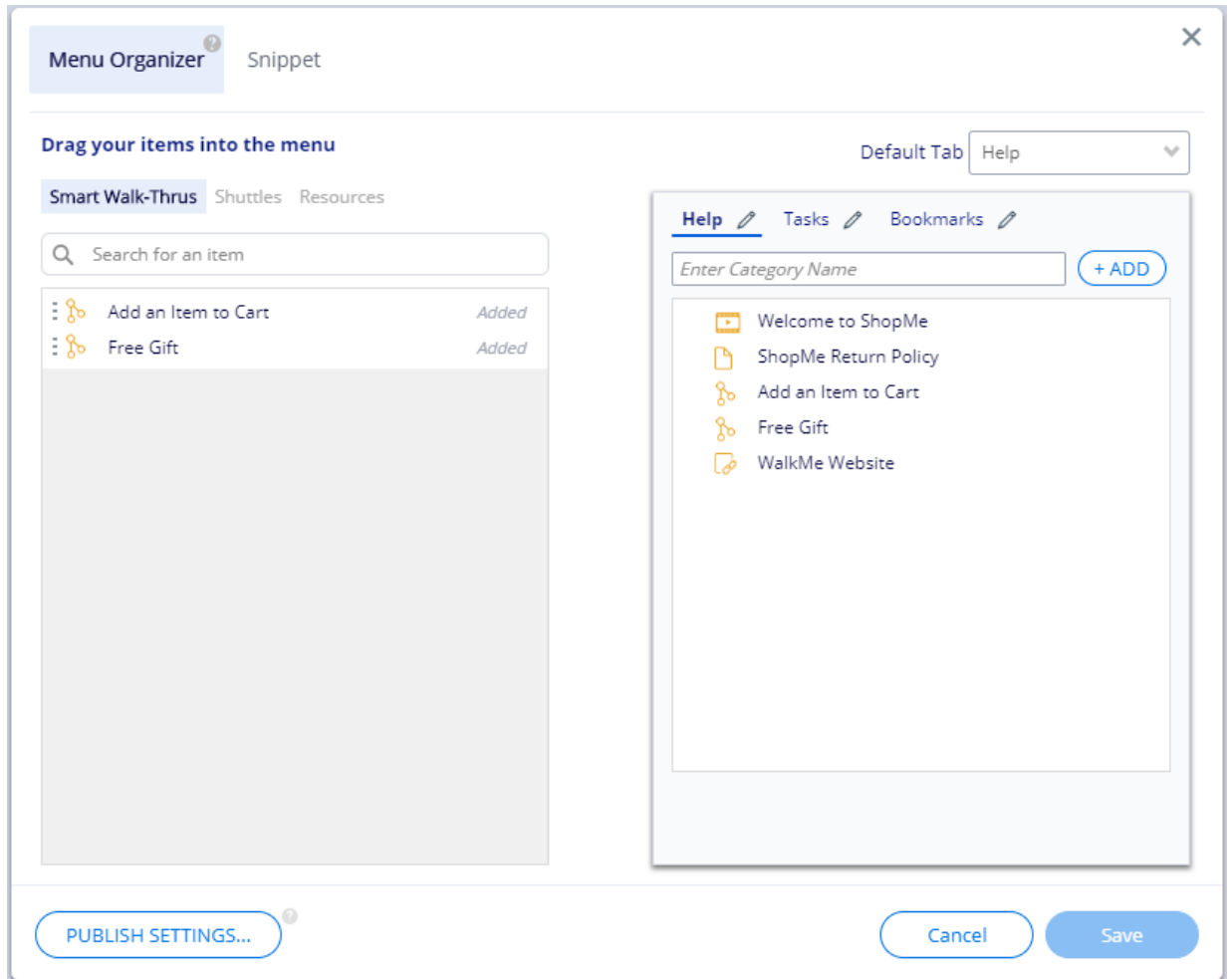
Organizing your WalkMe content

You can organize your items through the Menu Organizer in the WalkMe Editor:

- Click the Menu icon in the Admin Bar:



- In the Menu Organizer tab, drag items from the left column to the right column:

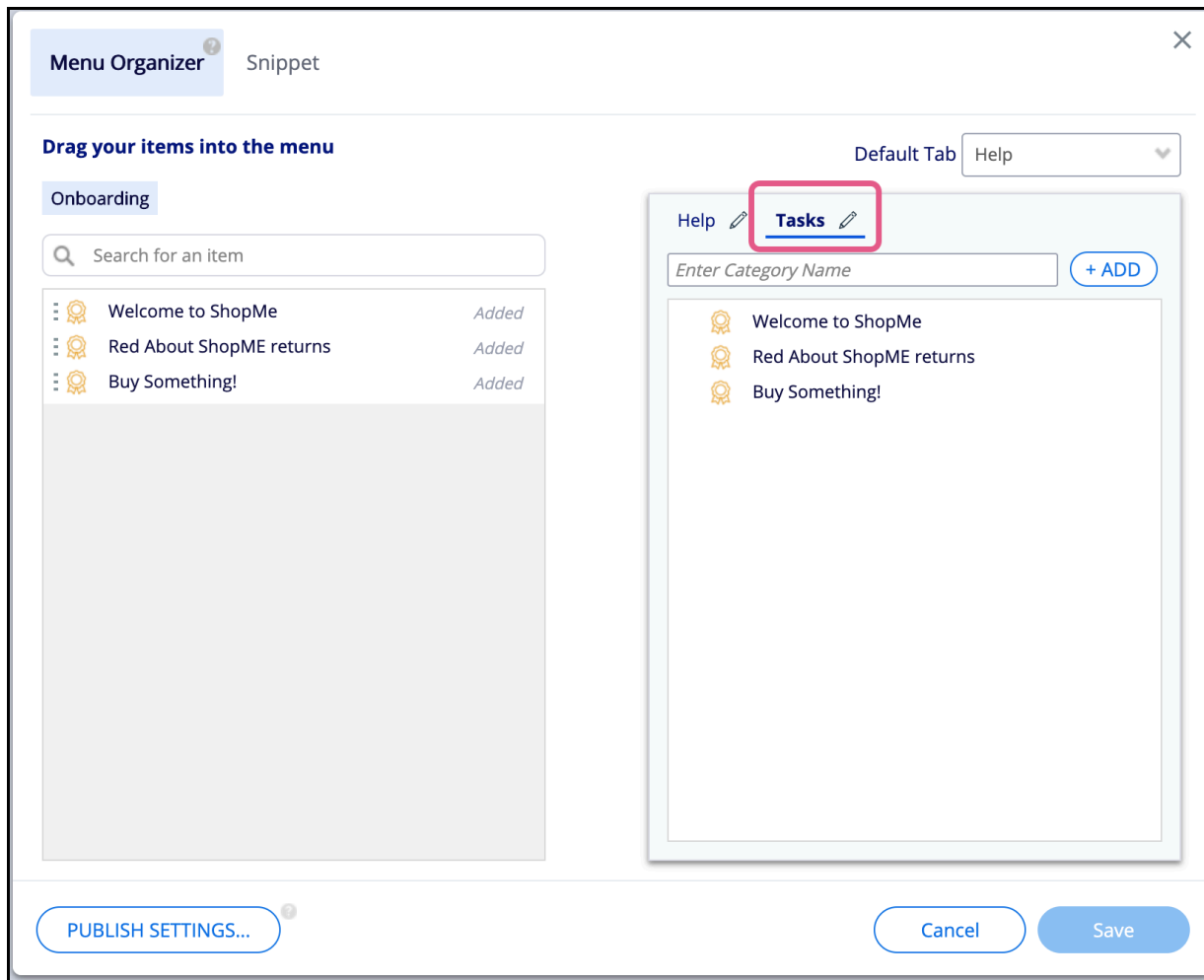


- In the left column, drag and drop items in the order you would like them to be displayed.

Create Onboarding Tasks

From the Menu Organizer in the WalkMe Editor, you can also organize your Onboarding Tasks.

- Click the Tasks button above the right column to access your task list:



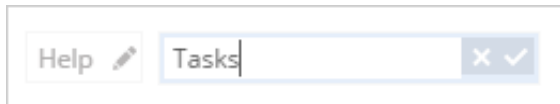
- Then, in the left column, drag and drop items into the order you'd like them to be displayed.

Note:

Published items may not appear in the WalkMe Player Menu on every page because of Segmentation Rules. If the Segment is false, the item will not appear in the Desktop Widget, but the order of all the other items will remain the same.

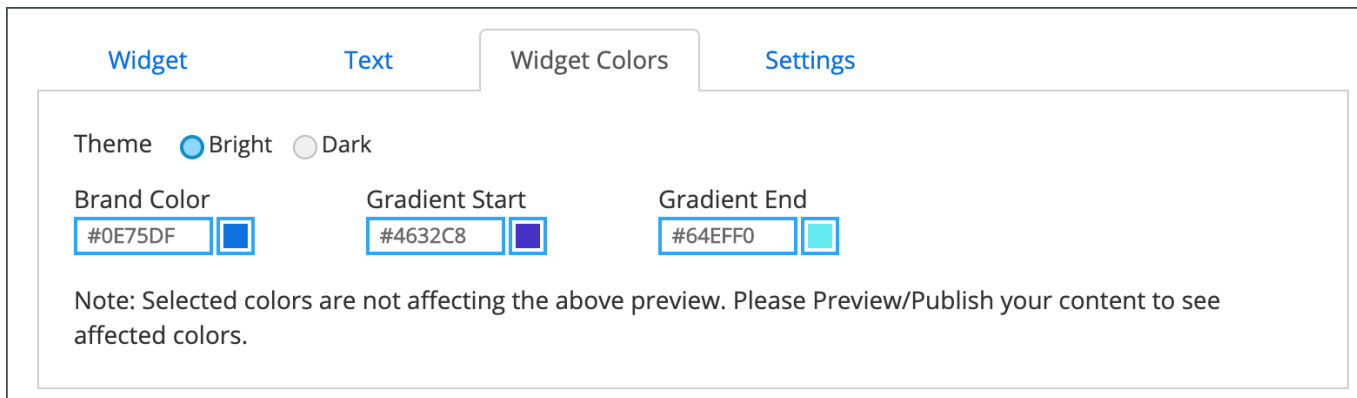
Edit Your Tab Names

You can further customize the menu by editing the name to appear as your tab names, which will appear by default when opening the menu (by default these are set to Help or Tasks). Click on the pencil icon next to each name to edit. Both tabs will always be accessible.



Customizing the Widget

To change the appearance of your Desktop Widget (and the Player and Notification Center by default) go to the Customize tab.



Closing and moving your Desktop Widget

You can move around the widget while minimized.



It is only possible to close the Workstation Widget by right-clicking on the widget and selecting close.

Adding New Tabs

In order to separate the content of different systems, the recommendation is to use different tabs. Tabs can be added only by requesting access from your Account Manager to create tabs since this is a custom solution.

