

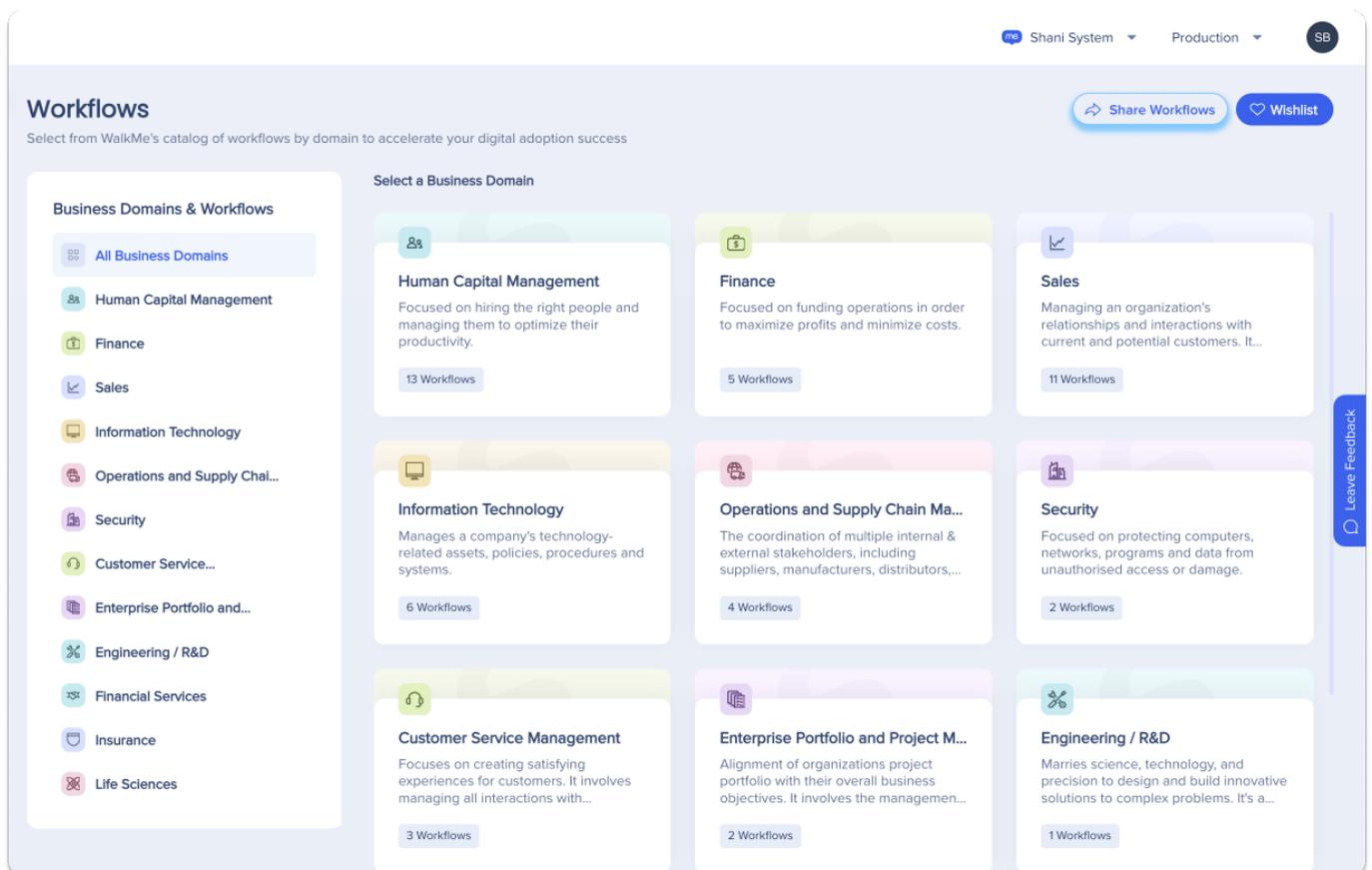
# Invite Coworkers to External Workflows

## Brief Overview

Introducing **Share Workflows** - the perfect way for your team to collaborate and share information! This feature promotes efficient communication and ensures that all relevant stakeholders are involved in the workflow process. It's easy to use - just **invite your coworkers to specific workflows on the external console site** by sending a link via email. This way, you can work together more effectively, saving time and increasing productivity.

## WalkMe Access Required

Please note that the Share Workflows button is currently only available from the internal console site, so only users with WalkMe credentials will be able to invite their coworkers.



## Key Benefits

- **Selective sharing:** Users can selectively share workflows with specific individuals or groups ensuring that only relevant stakeholders have access to the pertinent information
- **Streamlined communication:** The feature facilitates efficient communication by providing a convenient platform for inviting recipients and including contextual messages within the invitation
- **Enhanced control:** WalkMe users maintain control over the dissemination of information, ensuring that sensitive workflows are shared only with authorized users

## How to Send Invitations

Customers can easily configure workflow accelerators using the Workflows app. If you have WalkMe credentials, you can access the app through the internal console.

Alternatively, customers without credentials can still use the app by receiving an invitation from someone who does. The external console is used for this purpose. In this section, we'll go over how to send invitations to customers.

### Accessing the external site

Upon logging into the WalkMe internal console and navigating to the Workflows application in the sidebar, you will be greeted with the home page displaying WalkMe's selection of business domains.

A new **Share Workflows** button is located in the header, guiding you to initiate the sharing process.

WalkMe Workflows

Select from WalkMe's catalog of workflows by domain to accelerate your digital adoption success

Shani System | Production | SB

Share Workflows | Wishlist

**Business Domains & Workflows**

- All Business Domains
- Human Capital Management
- Finance
- Sales
- Information Technology
- Operations and Supply Cha...
- Security
- Customer Service...
- Enterprise Portfolio and...
- Engineering / R&D
- Financial Services
- Insurance
- Life Sciences

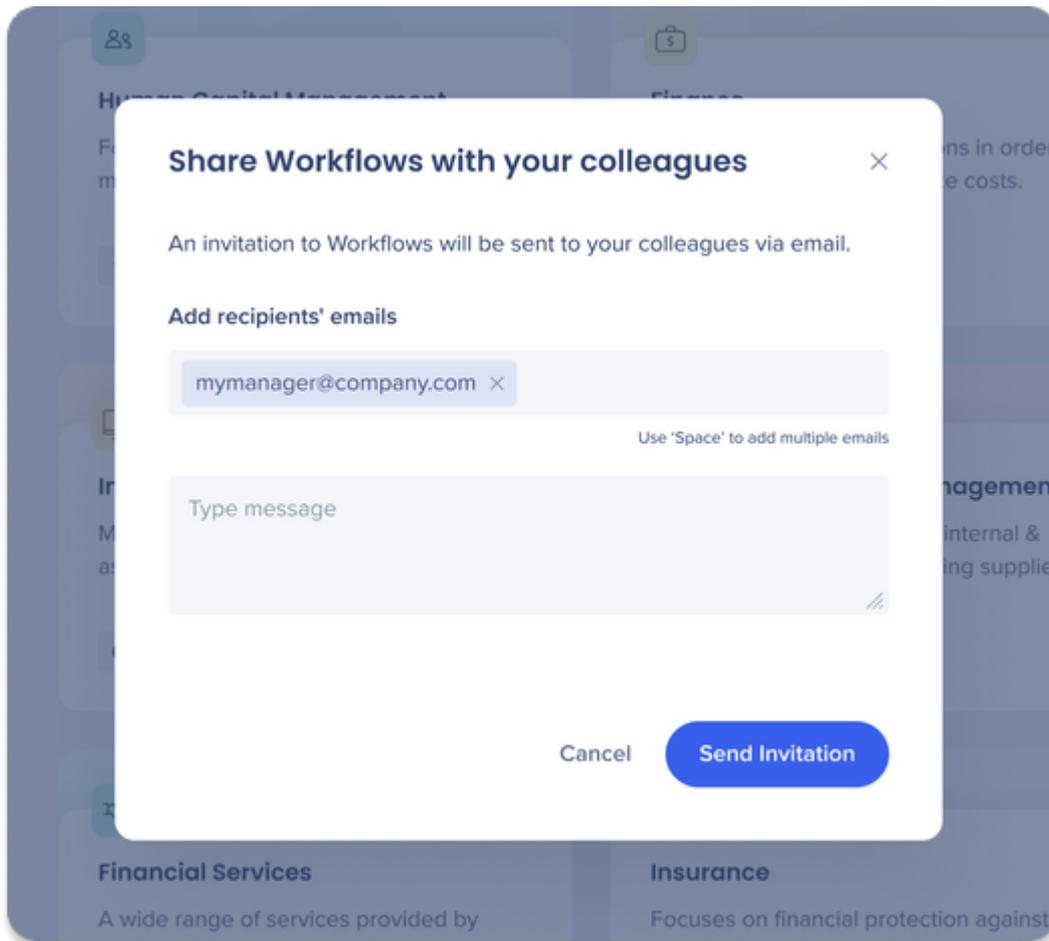
**Select a Business Domain**

Business Domain	Description	Number of Workflows
Human Capital Management	Focused on hiring the right people and managing them to optimize their productivity.	13 Workflows
Finance	Focused on funding operations in order to maximize profits and minimize costs.	5 Workflows
Sales	Managing an organization's relationships and interactions with current and potential customers. It...	11 Workflows
Information Technology	Manages a company's technology-related assets, policies, procedures and systems.	6 Workflows
Operations and Supply Chain Ma...	The coordination of multiple internal & external stakeholders, including suppliers, manufacturers, distributors,...	4 Workflows
Security	Focused on protecting computers, networks, programs and data from unauthorised access or damage.	2 Workflows
Customer Service Management	Focuses on creating satisfying experiences for customers. It involves managing all interactions with...	3 Workflows
Enterprise Portfolio and Project M...	Alignment of organizations project portfolio with their overall business objectives. It involves the managemen...	2 Workflows
Engineering / R&D	Marries science, technology, and precision to design and build innovative solutions to complex problems. It's a...	1 Workflows

Leave Feedback

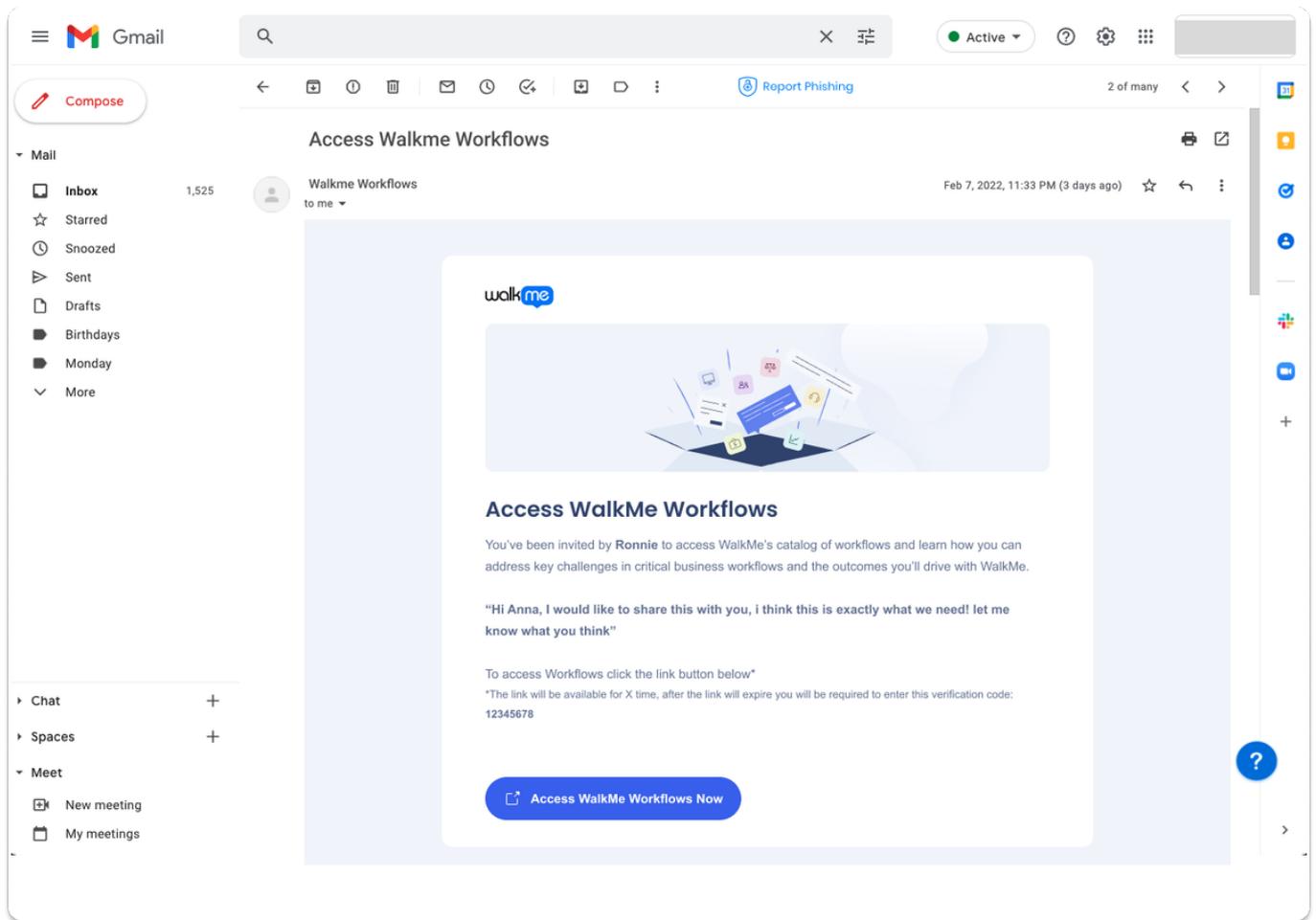
## Inviting Recipients

Click on the **Share Workflows** button to trigger a popup where you can input one or more recipients' email addresses. Additionally, you have the option to include a personalized message for the recipients, providing context or instructions regarding the shared workflows.



Click the **Send Invitation** once you've finished inputting the necessary recipient information and crafting a message.

At this point, the backend system processes the request and generates customized email invitations for each specified recipient.



## Recipient Interaction

Recipients receive the email invitations containing the **Access WalkMe Workflows Now** button. Upon clicking this within the email, recipients are directed to a new browser tab, instantly accessing the Workflows external site.

**Workflows**  
Select from WalkMe's catalog of workflows by domain to accelerate your digital adoption success

[Request a Demo](#) [Wishlist](#)

**Business Domains & Workflows**

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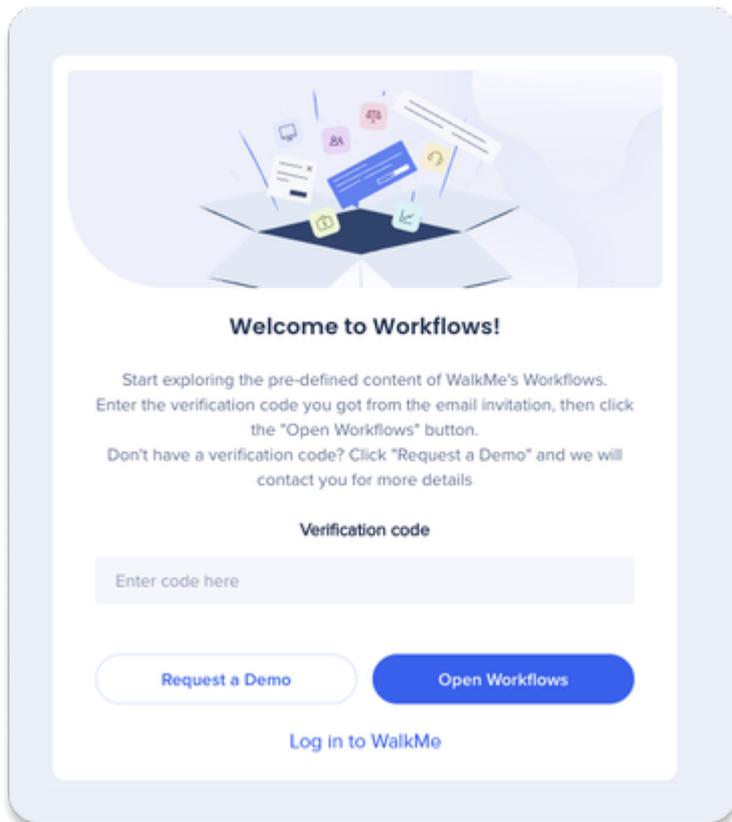
**Select a Business Domain**

Business Domain	Description	Number of Workflows
Human Capital Management	Focused on hiring the right people and managing them to optimize their productivity.	13 Workflows
Finance	Focused on funding operations in order to maximize profits and minimize costs.	5 Workflows
Sales	Managing an organization's relationships and interactions with current and potential customers. It involves using technology to organize, automate...	11 Workflows
Information Technology	Manages a company's technology-related assets, policies, procedures and systems.	6 Workflows
Operations and Supply Chain Management	The coordination of multiple internal & external stakeholders, including suppliers, manufacturers, distributors, retailers, and customers, including...	4 Workflows
Security	Focused on protecting computers, networks, programs and data from unauthorised access or damage.	2 Workflows
Financial Services	A wide range of services provided by financial institutions such as banks, credit unions, insurance companies, investment firms, and other financial...	4 Workflows
Insurance	Focuses on financial protection against risks and uncertainties. Insurance companies offer a range of insurance products to individuals, businesses, and...	7 Workflows
Life Sciences	Focused on ensuring the safety and efficacy of products and services through regulatory oversight and compliance.	3 Workflows

## Verification Code

Users navigating to the Workflow's external site who have not gained access from an invite email will be required to enter a verification code to access the site.

Verification codes are located in the recipient's invite email.



## Technical Notes

- **External task sharing not supported:** If a user shares their wishlist, the email will include links to the workflows. However, tasks cannot be shared externally, so we won't provide links to them in the email
- **Invitation Validity:** When a user is invited to access the Workflow Accelerator's external site via email, the invitation remains valid for a duration of 14 days from the time of issuance
- **Verification Code Validity:** The verification code provided in the original invitation email remains valid for a period of 14 days from the time of issuance
- **Security Measures:** The validation code requirement enhances security by ensuring that only authorized recipients with valid invitations or verification codes can access the Workflow Accelerator's external site
- **Time Sensitivity:** Users are advised to utilize their invitations and verification codes within the stipulated 14-day validity period to avoid any access issues. After the 6-day validation

period, a WalkMe employee or WalkMe user will be required to re-share access with the user