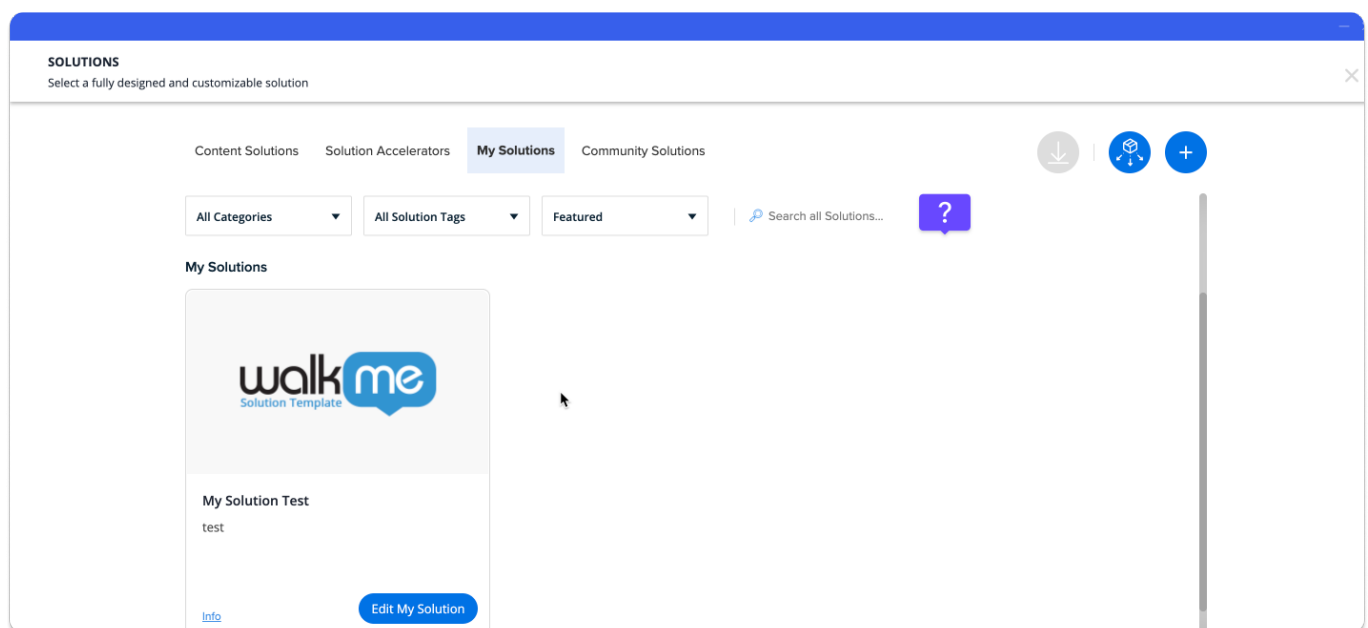


My Solutions Templates

Overview

My Solutions are user-generated templates that allow you to stay up-to-date with your organization or partner's latest brand guidelines, campaign, or content recommendations by easily sharing content between accounts. Then, using a secured distribution key, you can easily share the solution package that you've built between editor accounts.



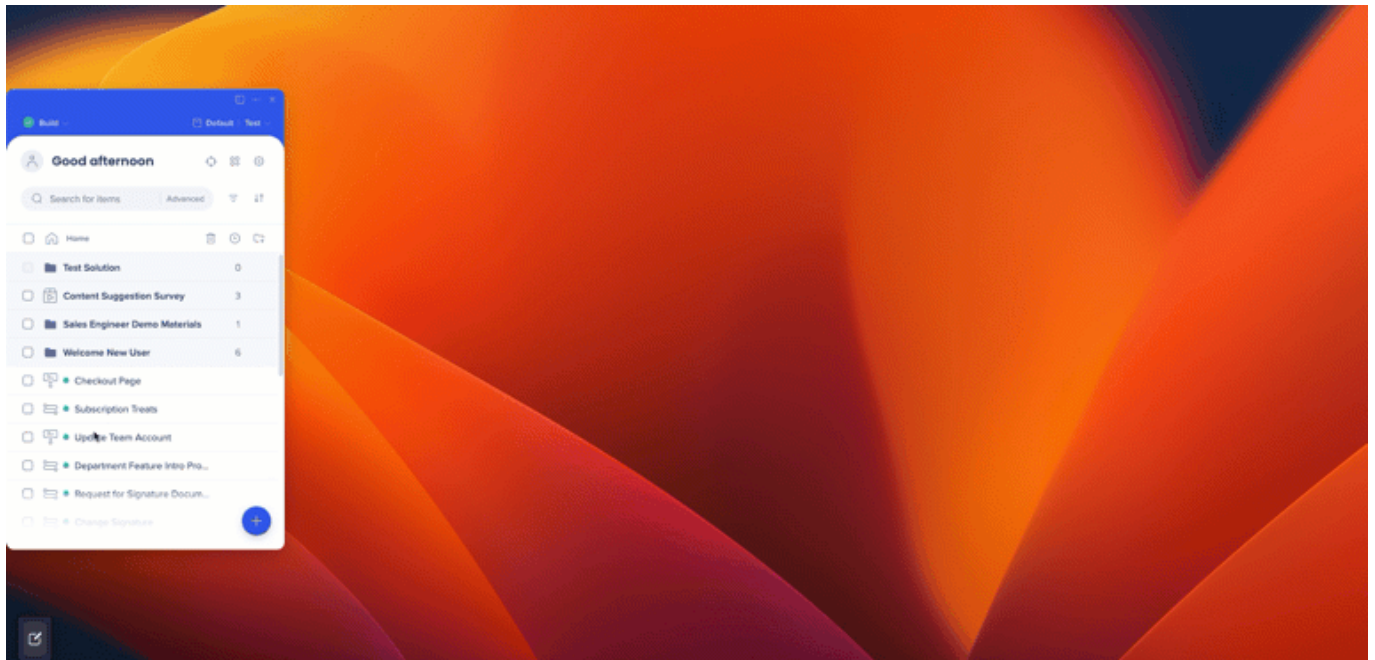
New!

User-generated Solution Templates can now distribute WalkMe Items connected to DeepUI elements.

How to Access

How to get to the My Solution tab in the Solutions Gallery

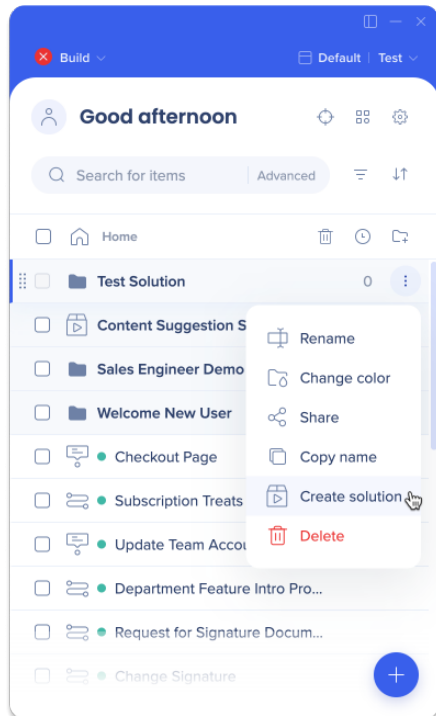
1. Click the **+** icon to open the dropdown menu in the WalkMe Editor
2. Select **Solution**
3. Click the **My Solutions** tab



Get to Know and Use

Create a Solutions Template from the WalkMe Editor

1. Login to the Editor
2. Locate the desired WalkMe items folder to convert into a Solution Template
3. Click on the folder's vertical ellipsis button to open the folder dropdown options



4. Select **Create Solution** to launch the Create New popup modal from the dropdown list
5. With the Editor's **Create New Solution Template** popup modal open, create your Template's metadata:
 1. Your WalkMe items folder will be pre-selected, no action required
 2. Under Template Metadata
 1. Adjust Template display name as needed
 2. Enter your Solution Template's Description (*MANDATORY)
 3. Select the Template's Privacy Setting
 4. Select the 'Template Copy Protection' to protect your templates from anti-piracy
Template Copy Protection

The 'Template Copy Protection' setting identifies WalkMe items downloaded from the Solutions Gallery as template-deployables. Template-deployables are restricted from being reused in new user-generated Solution Templates hosted within the My Solutions catalog of the Solutions Gallery.

5. Select the Template's screenshot and URL Settings
6. Select the Include Multi-Language Translations to include translations from the Admin Center.
7. Upload a Solution Template Tile Cover Image
 - WalkMe offers a generic default cover image
8. Click **Next**

Solutions Gallery

Create New Solutions Template

Template Content Settings

Select a Folder

Template Metadata

Template Title*

Template Tile Description*

200 characters remaining

Solution Template Settings

☐ Private Template (Exclude From Shared Solutions)
 ☐ Enable Copy Protection
 ☒ Exclude captured screenshots and URLs
 ☐ Include Multi-Language Translations

Add Solution Template Tile Cover Image

Upload Cover Image

Optional. Edit and update WalkMe's generic default cover image at your convenience.

Cancel

Next

Now, enter the optional metadata to enable the Solution's Overview Modal:

- Enter a hosted image or video URL to enable the Preview tab within the Solution's Overview Modal
 - Click the **upload icon (up arrow)** to open the Assets Library
 - Choose or upload a jpg, png, or mp4 file
 - Click **Save**
 - Create a preview carousel by placing a comma in between URLs or by clicking the upload icon (up arrow) to choose or upload multiple preview assets
 - Click the **View Template in Share link** to generate a Preview Video.
 - To learn how to create a Preview Video from WalkMe Share, [click here](#)
- Enter additional details about the Solution Template with the rich text editor to enable the Description tab within the Solution's Overview Modal
 - Click the "Generate a Solution Description Template" to have WalkMe inject a pre-built description template
- Click to enable the Template's relevant Solution Tags

Solutions Gallery

Create New Solutions Template

Create Template Preview Tab

Enter video or custom image URL.

Preview URL (Optional)

[View Template in Share](#)

Create Template Description Tab

Generate a Solution Description Template

Provide users with important details about your Solution Template.

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Enter Template Description (Optional)

4000 characters remaining (includes markup)

Solution Tags

☐ Onboarding

☐ Training

☐ Support

☐ Conversion

☐ Retention

☐ Feature Adoption

☐ Change Management

☐ Data Integrity

Cancel

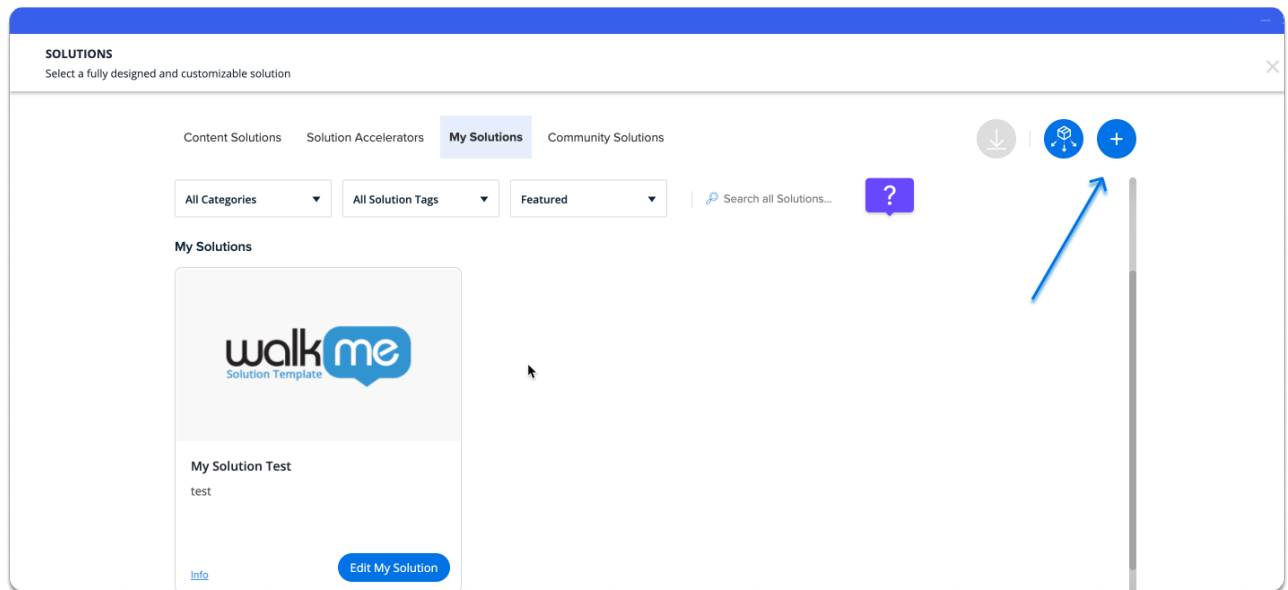
Back

Save

2. Click **Save**
3. Go to the **My Solutions tab** in the Solutions Gallery
4. Locate the newly created Solutions Template under the Solution Gallery category, titled My Solutions

Create a Solutions Template from the Solutions Gallery

1. Navigate to the [Solutions Gallery](#)
2. Click the **Create New button +** from within the “My Solutions” tab to launch the Solution Template metadata popup modal form



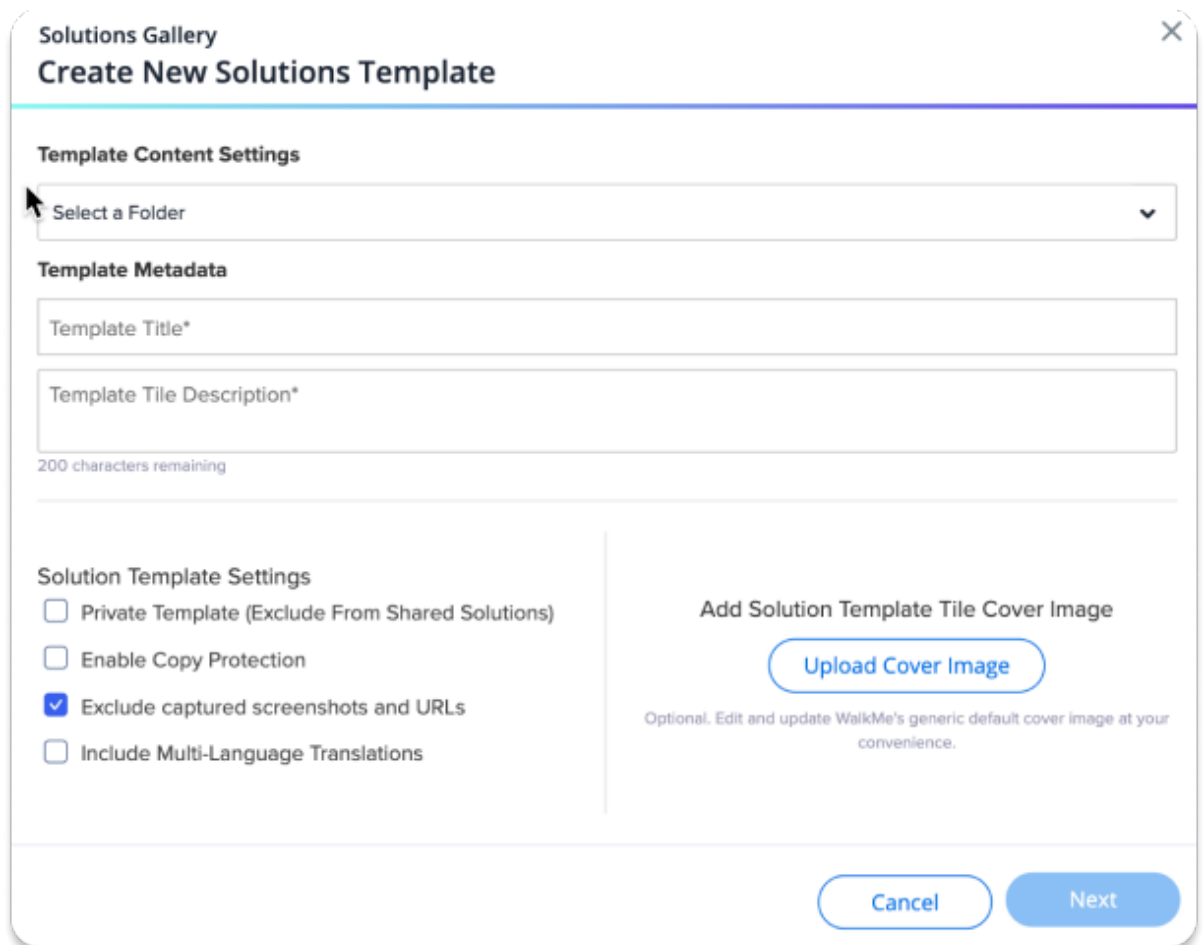
3. With the Editor's **Create New Solution Template** popup modal open, create your Template's metadata:

1. Select the WalkMe items folder or Sub Folder to templatize (*MANDATORY)

Note

All WalkMe items in a solution template will transfer over as non-published. (including archived and published content)

2. Select an ActionBot to include and templatize
3. Under Template Metadata
 1. Add Template Name (*MANDATORY)
 2. Enter your Solution Template's Description (*MANDATORY)
4. Select the Template's Privacy Setting
5. Select the Template's screenshot and URL Settings
6. Select the Include Multi-Language Translations to include translations from the Admin Center.
7. Upload a Solution Template Title Cover Image
 - WalkMe offers a generic default cover image
8. Click **Next**



4. Now, enter the optional metadata to enable the Solution's Overview Modal:
 1. Enter a hosted image or video URL to enable the Preview tab within the Solution's Overview Modal
 1. Click the upload icon (up arrow) to open the Assets Library
 - Choose or upload a jpg, png, or mp4 file
 - Click **Save**
 2. Create a preview carousel by placing a comma in between URLs or by clicking the upload icon (up arrow) to choose or upload multiple preview assets.
 3. Click the 'View Template in Share' link to generate a Preview Video.
 - To learn how to create a Preview Video from WalkMe Share, [click here](#)
 2. Enter additional details about the Solution Template with the rich text editor to enable the Description tab within the Solution's Overview Modal
 - Click the **Generate a Solution Description Template** to have WalkMe inject a pre-built description template
 3. Click to enable the Template's relevant Solution Tags
5. Click **Save**

Solutions Gallery

Create New Solutions Template

Create Template Preview Tab

Enter video or custom image URL.

Preview URL (Optional)

[View Template in Share](#)

Create Template Description Tab

Generate a Solution Description Template

Provide users with important details about your Solution Template.

B

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Enter Template Description (Optional)

4000 characters remaining (includes markup)

Solution Tags

☐ Onboarding
 ☐ Training
 ☐ Support
 ☐ Conversion
 ☐ Retention
 ☐ Feature Adoption
 ☐ Change Management
 ☐ Data Integrity

Cancel

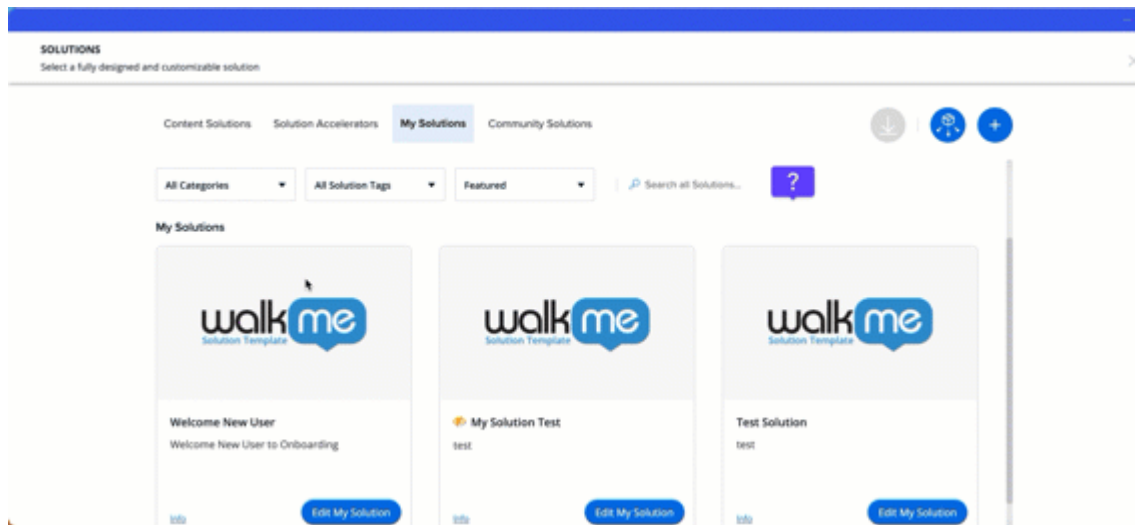
Back

Save

“My Solutions”

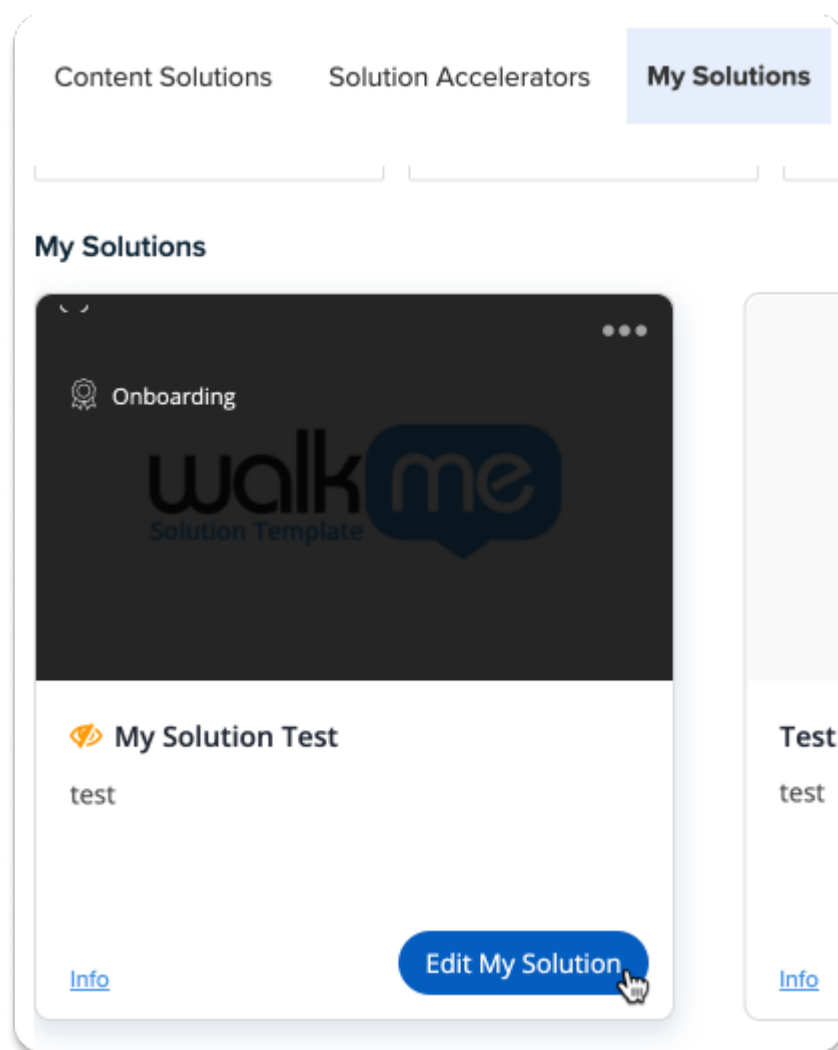
Upon saving the Solution Template, you can locate the newly created Solutions Template within the ‘My Solutions’ tab, within the Solutions Gallery.

When there are multiple Solution Templates within the My Solutions tab, you can drag and drop your Templates to set their display order.



Edit Your Solution Templates

1. Click **Edit My Solution** on your solution to make adjustments
2. Click **Update** when you're finished editing your solution



How to Distribute “My Solutions” to a Solutions Subscriber

Providing a user Solutions Distribution Key to another WalkMe Editor user grants the user permission to access, download, and modify any Solution Templates created under the “My Solutions” category of the Solutions Gallery Content Solutions. This includes any future Solution Template created by the Solutions Provider.

Modifications made to a downloaded Solution Template’s WalkMe content by a Solutions Subscriber will not modify the Provider’s source Solution Template’s WalkMe content.

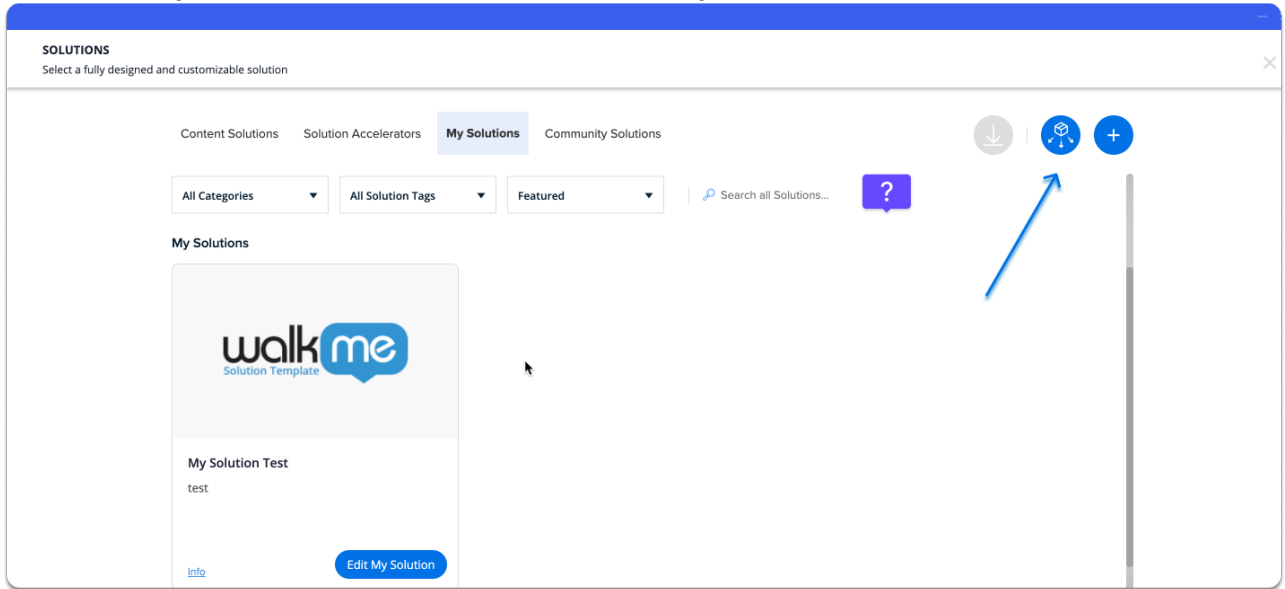
Solution Templates downloaded by a Solution Subscriber are a duplicate instance of the Solution Provider’s original content.

Standard Distribution Settings

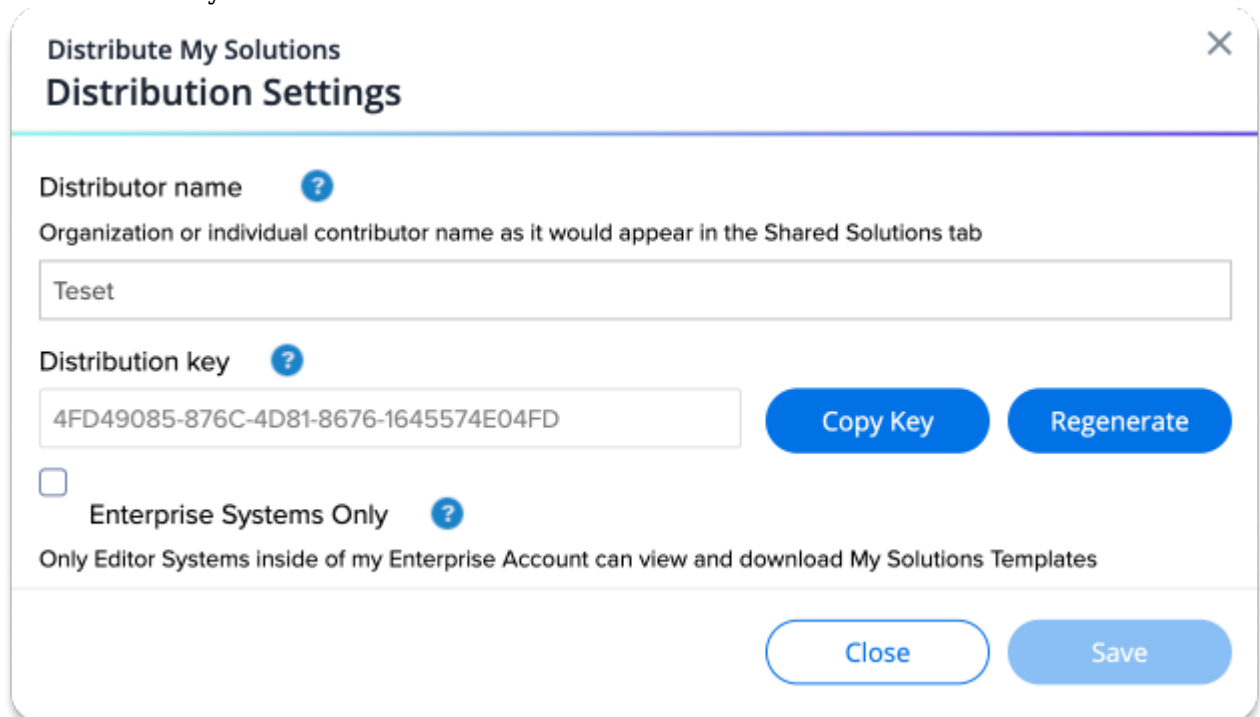
Note

User roles equal to Insights Access, Content Moderator, Publisher, or Translator will have permission to copy and distribute Solution Distribution Keys via the Standard Distribution Settings.

1. From the “My Solutions” tab in the Solutions Gallery, click the **Distribute Solutions** button



2. This will launch the “My Solution’s Distribution Key” popup modal where you can enter the Distribution Key label:



3. Click **Copy Key**

4. Click **Close** to close the Distribute Solution Templates popup
5. Paste the Distribution Key into an email to the intended WalkMe Solutions Subscriber(s)

Admin Distribution Settings

Note

User roles equal to Workspace Owner, Admin, or Content Curator will have permission to copy and distribute Solution Distribution Keys via the Admin Distribution Settings.

1. Login into the WalkMe Editor
2. Navigate to the **My Solutions tab** in the Solutions Gallery
3. Click the **distribution button** to initiate the Distribution Settings popup modal.
4. Enter a Distributor name (as it will appear in the Shared Solution tab) to enable the “Copy Key” call-to-action
5. Optionally
 1. Click **Copy Key** to copy the Distribution key
 2. Click **Save**
 3. Send your secure Distribution Key to other Editor users or unlock your own catalog in other Editor Systems
6. Optionally, click **Regenerate** to reset the Distribution key



Note

Clicking **Regenerate** will scramble your Distribution Key into a new randomized Key.

ALL Editor Systems subscribing to this Key will no longer have access to the user-generated template catalog once the Key is regenerated.

Subscribing System users will **NOT** be notified regarding the old Key’s regeneration and the revoked template catalog permissions.

Editor Systems will be required to update the Key in order to regain access.

Distribute My Solutions
Distribution Settings

Distributor name

Organization or individual contributor name as it would appear in the Shared Solutions tab

Please provide a distribution nickname

Distribution key

☐
Enterprise Systems Only

Only Editor Systems inside of my Enterprise Account can view and download My Solutions Templates

Enterprise Account connection

Enable this System's Distribution Key on all similar Editor Systems within my Enterprise Account

Distribution Keys can only be removed from the Editor System's General Settings

To quickly enable the Distribution key within an Enterprise Account:

1. Click the **Enterprise Account Connection dropdown**
2. Select available Editor Systems from the dropdown list
3. Close the dropdown
4. Click **Save**

Important

The Enterprise Account connection can only enable/push/write the Distribution Key to other Editor Systems. The Enterprise Account connection can not remove the Distribution Key from other Editor Systems once added.

Distribute My Solutions
Distribution Settings

Distributor name

Organization or individual contributor name as it would appear in the Shared Solutions tab

Distribution key

069662B3-2C19-4F47-863A-1B64D5E7AF27

Copy Key Regenerate

☐ Enterprise Systems Only

Only Editor Systems inside of my Enterprise Account can view and download My Solutions Templates

Enterprise Account connection

Enable this System's Distribution Key on all similar Editor Systems within my Enterprise Account

Salesforce Lightning

☒

☒ Salesforce Lightning

in the Editor System's General Settings

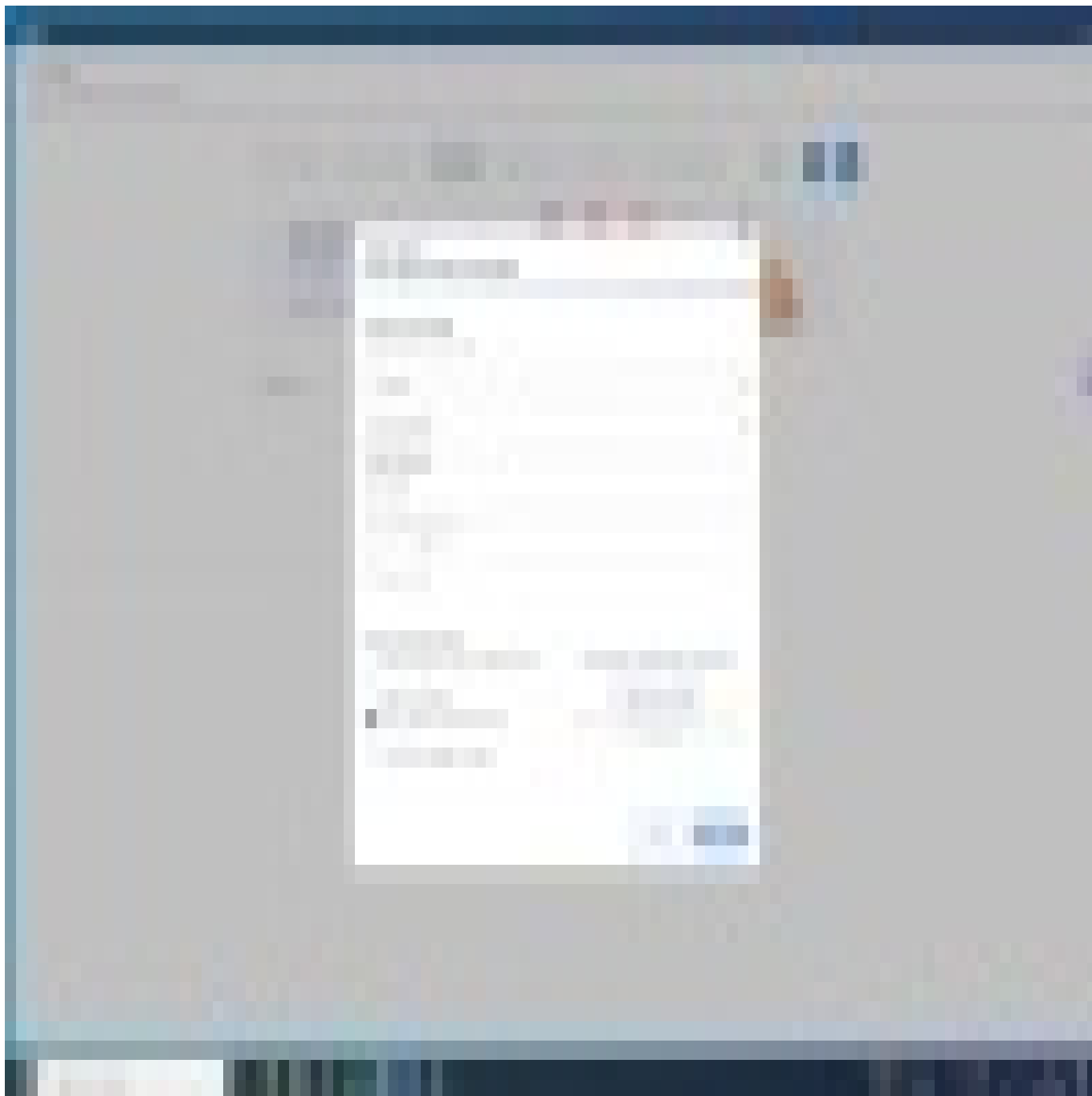
Close Save

Limitations

- Web Editor content cannot be distributed to Mobile Web or Desktop and Workstation Editors
- Mobile Web content cannot be distributed to Web or Desktop and Workstation Editors
- Desktop and Workstation Editor content cannot be distributed to Web or Mobile Web Editors
- When creating a Template Preview with a Vimeo URL, use the Vimeo-generated embed URL to generate a preview
 - Vimeo requires the embed URL to be used instead of the video's web address URL
- Limited to 125 WalkMe items per Solution Template

Tip Tuesday

Solution Distribution (Copying Content from One Editor to Another)



Transfer Web Content Between Systems





[Watch step-by-step tutorials and product videos.](#)