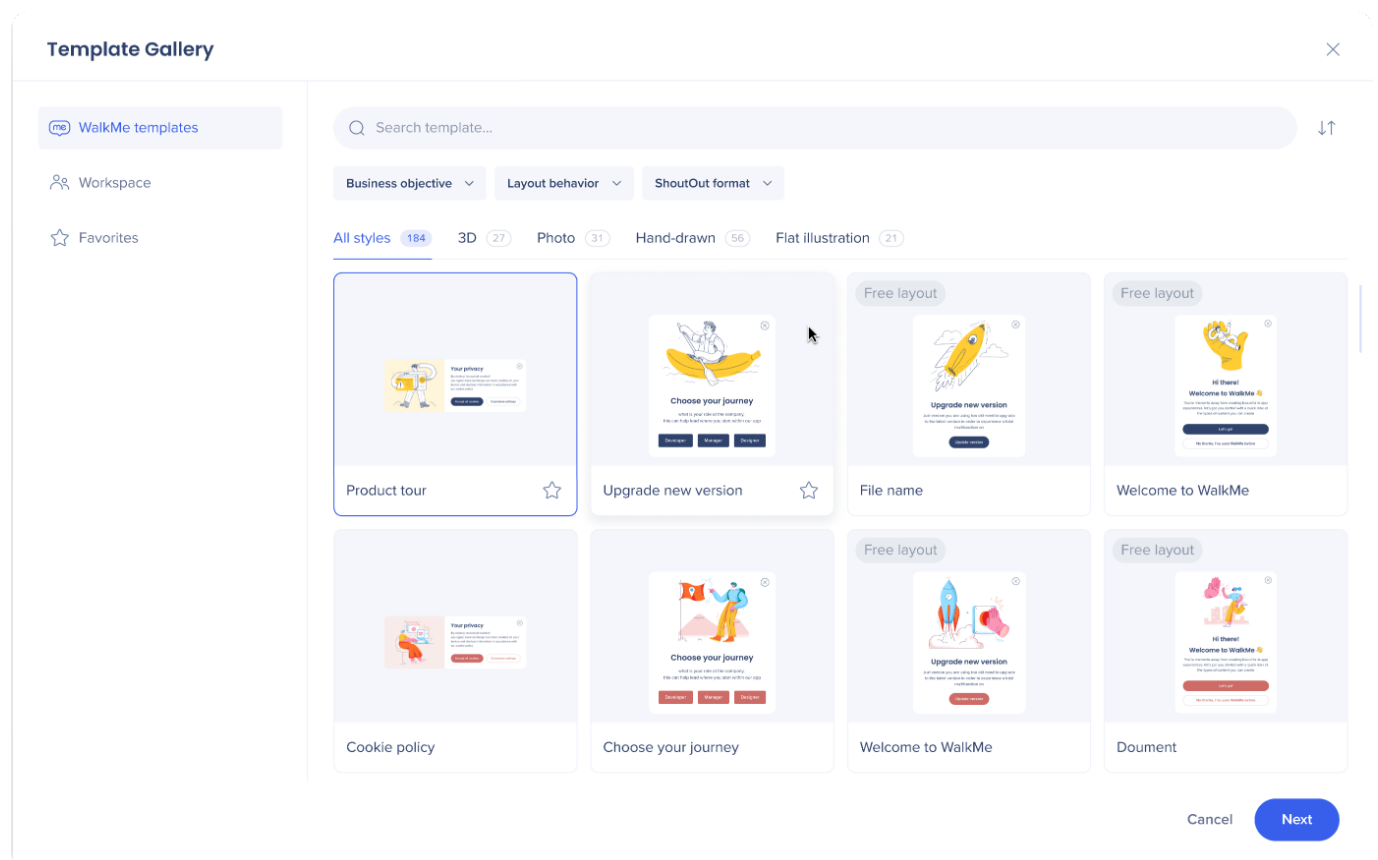


# Template Gallery

## Brief Overview

Template Gallery allows users to apply pre-made templates to their ShoutOuts, create and save their custom templates, and share them across the whole organization or among system users.

The new version of the Gallery offers more pre-made designs and better user experience.

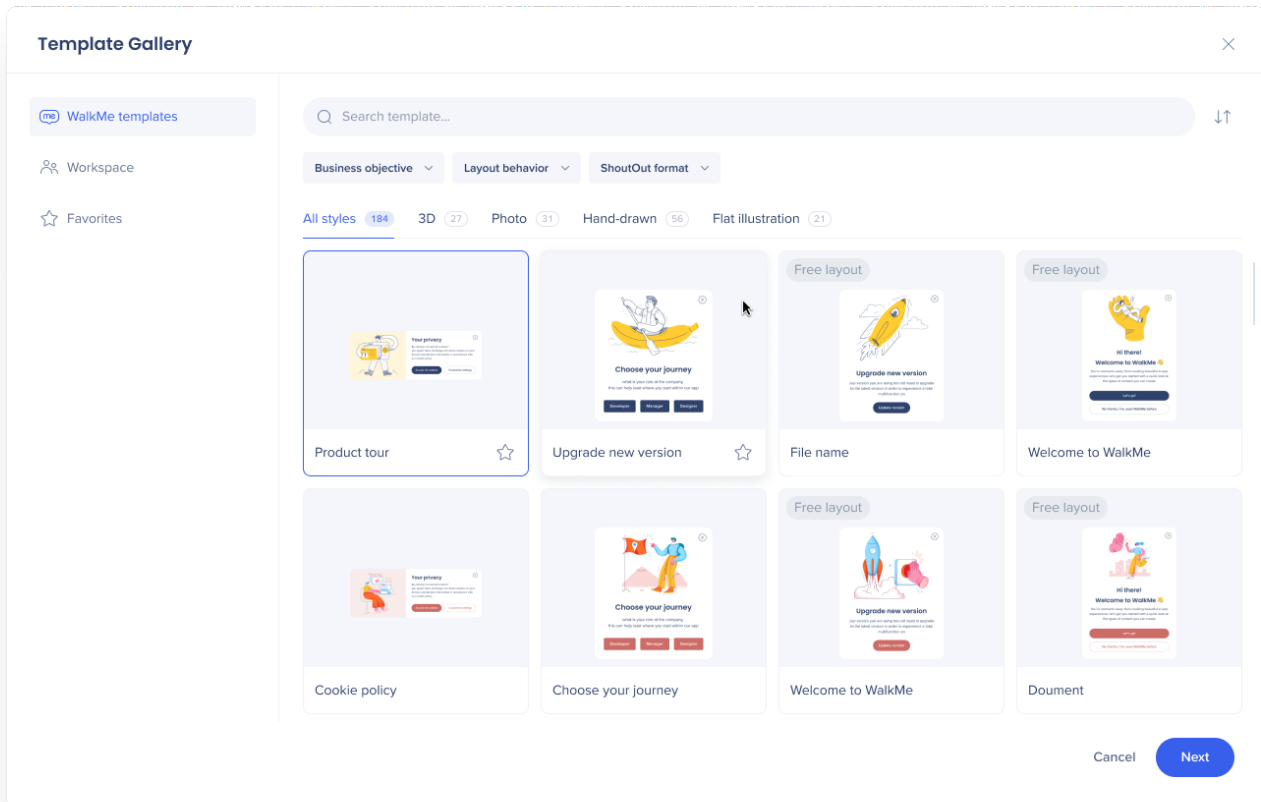


## WalkMe Templates

A gallery of the pre-made templates designed by WalkMe.

Templates can be filtered by:

- Business objective – Announcements, Tutorials, Onboarding
- Layout behavior – Dynamic, Free
- ShoutOut format – Mini Menu, Popup

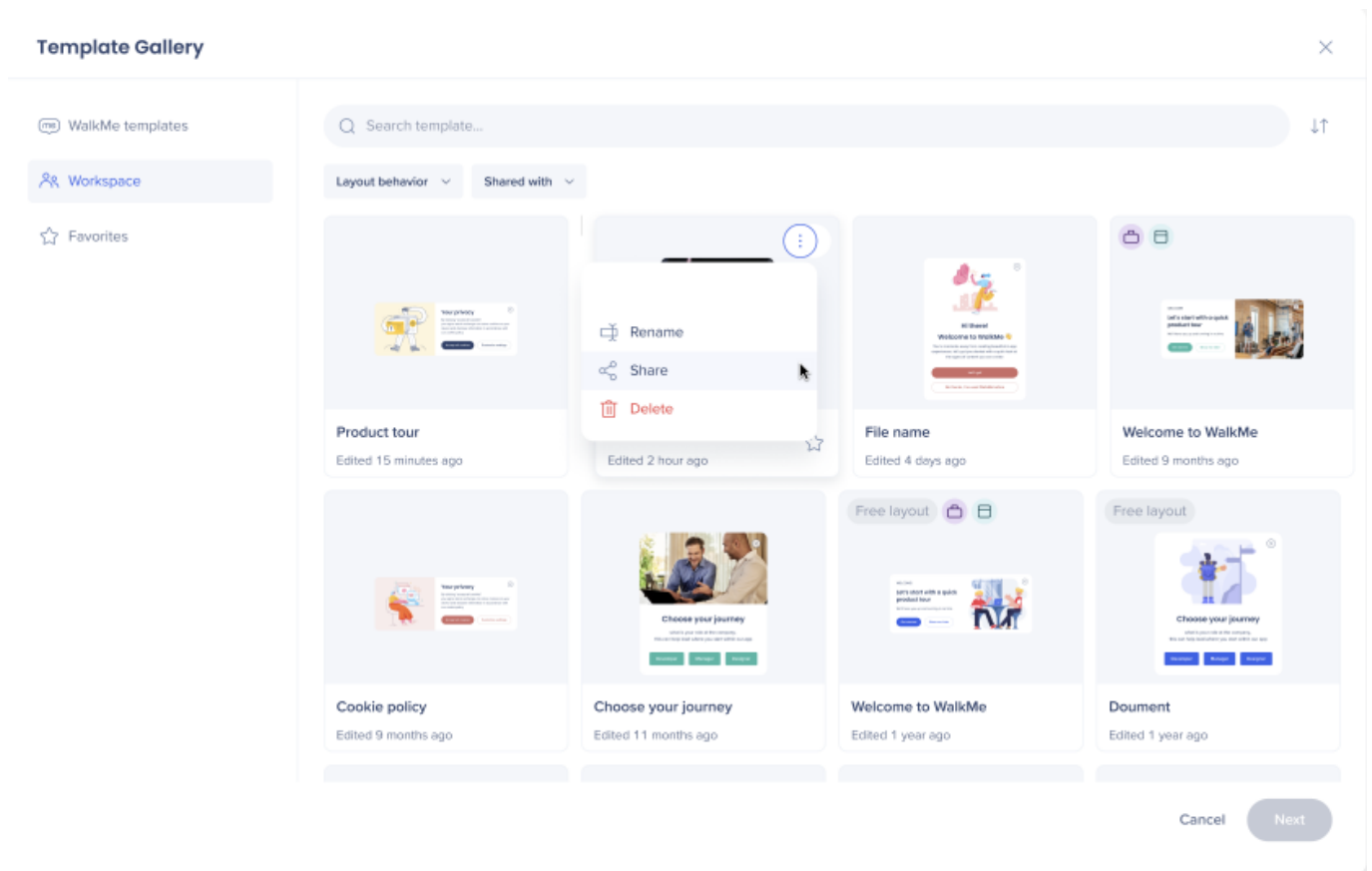


## Workspace

Templates the user's created or has been working with, including those shared across the organization or among a system users. Can be used by everyone, but added, and deleted only by the admins.

Icons in the upper left corner of each template identify whether the template is shared to the system, to the organization, or both.

User's templates saved in their workspace can be used across all systems.



## Note

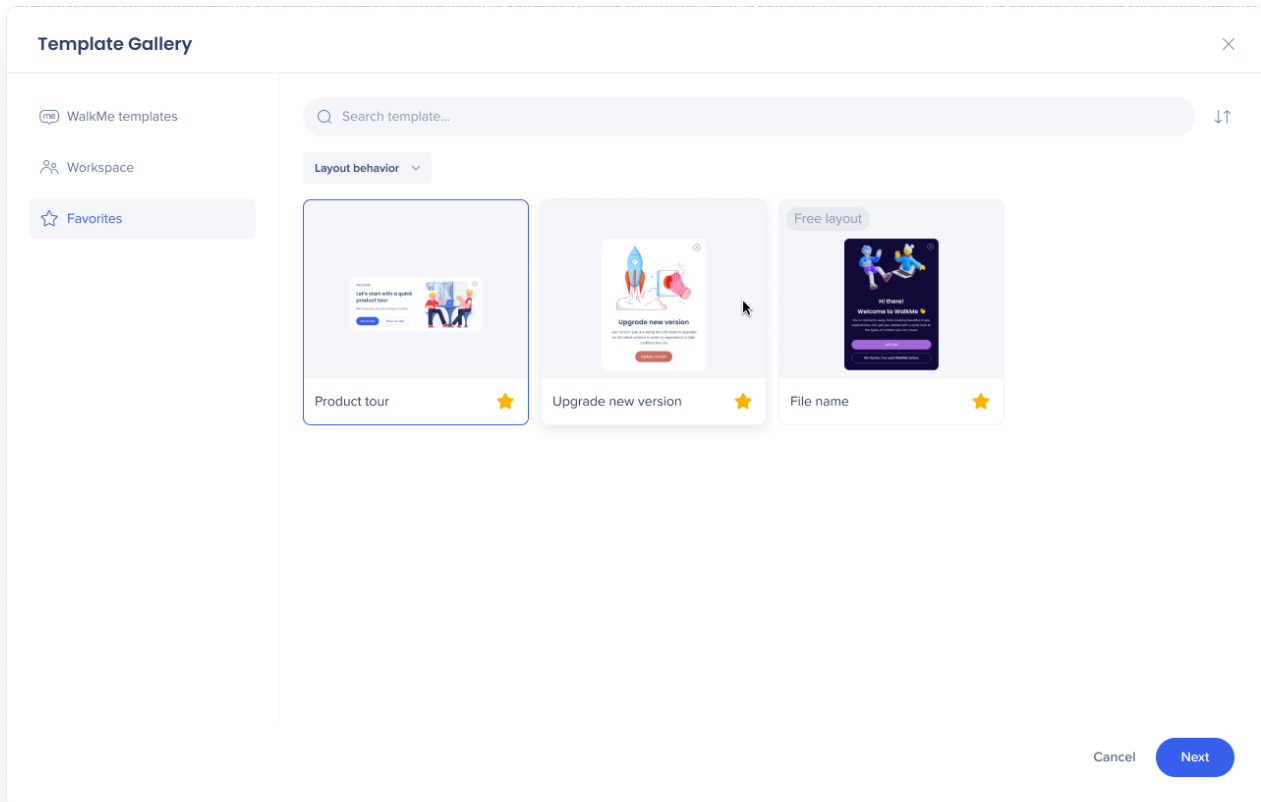
There's no edit option for now. To make changes to a template, create a new one and replace the old one with it.

Templates can be filtered by:

- Shared with – System, Organization
- Layout behavior – Dynamic, Free

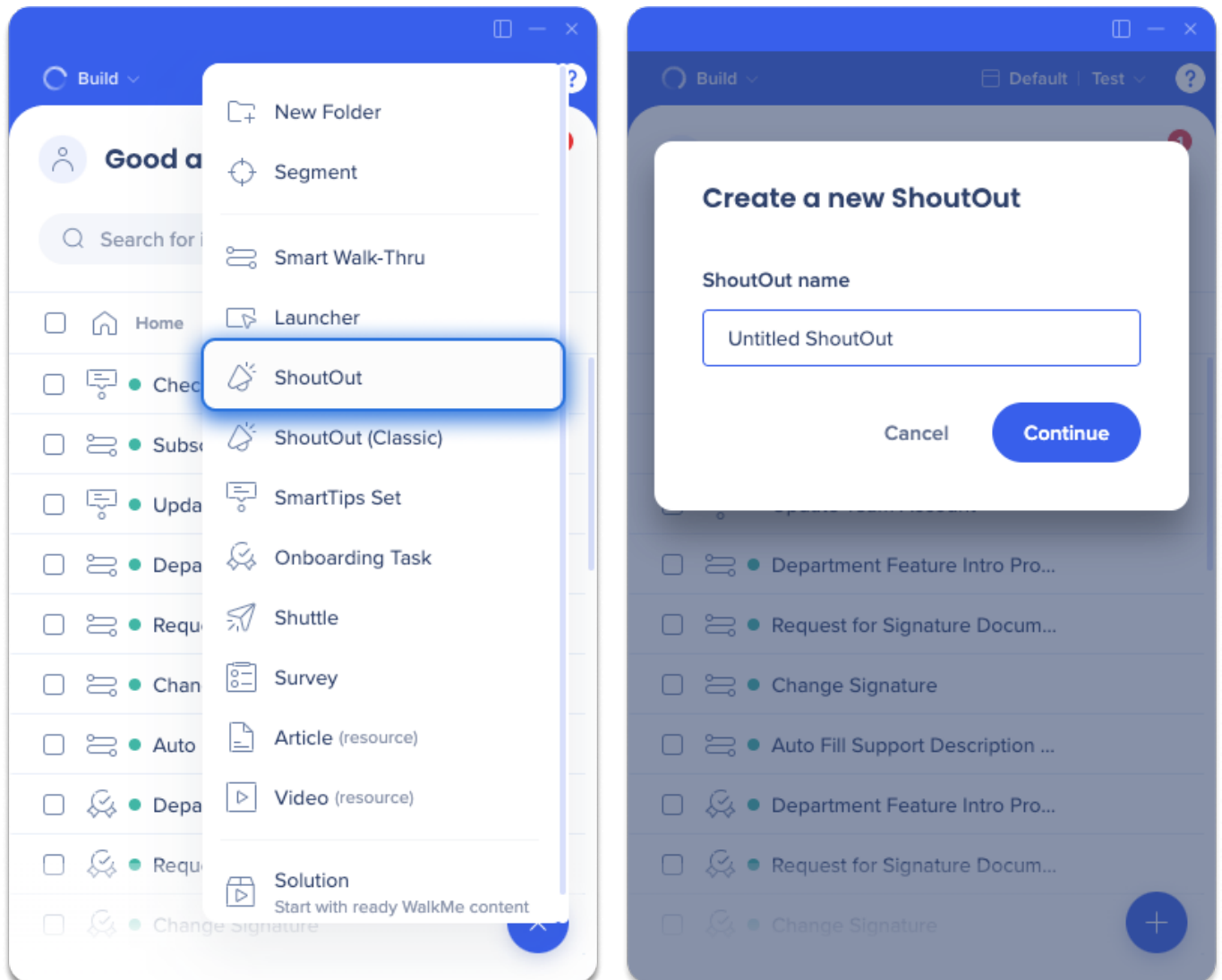
## Favorites

Templates saved as favorite per user. To save a template as favorite, click on the star icon in the bottom left corner of the template – it will turn yellow, and the template will be added to the Favorites tab.



## Save New Template

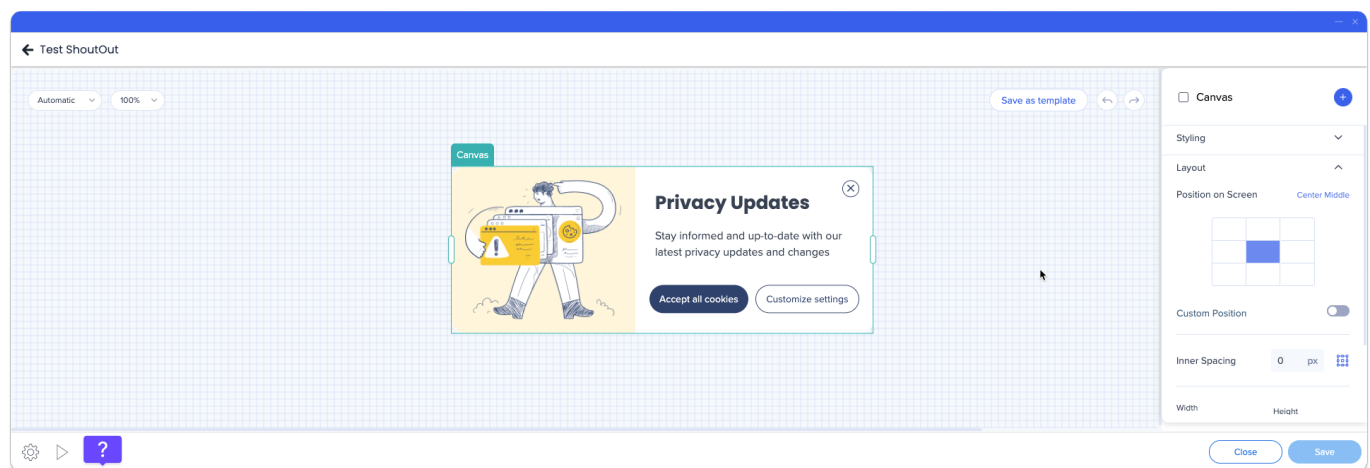
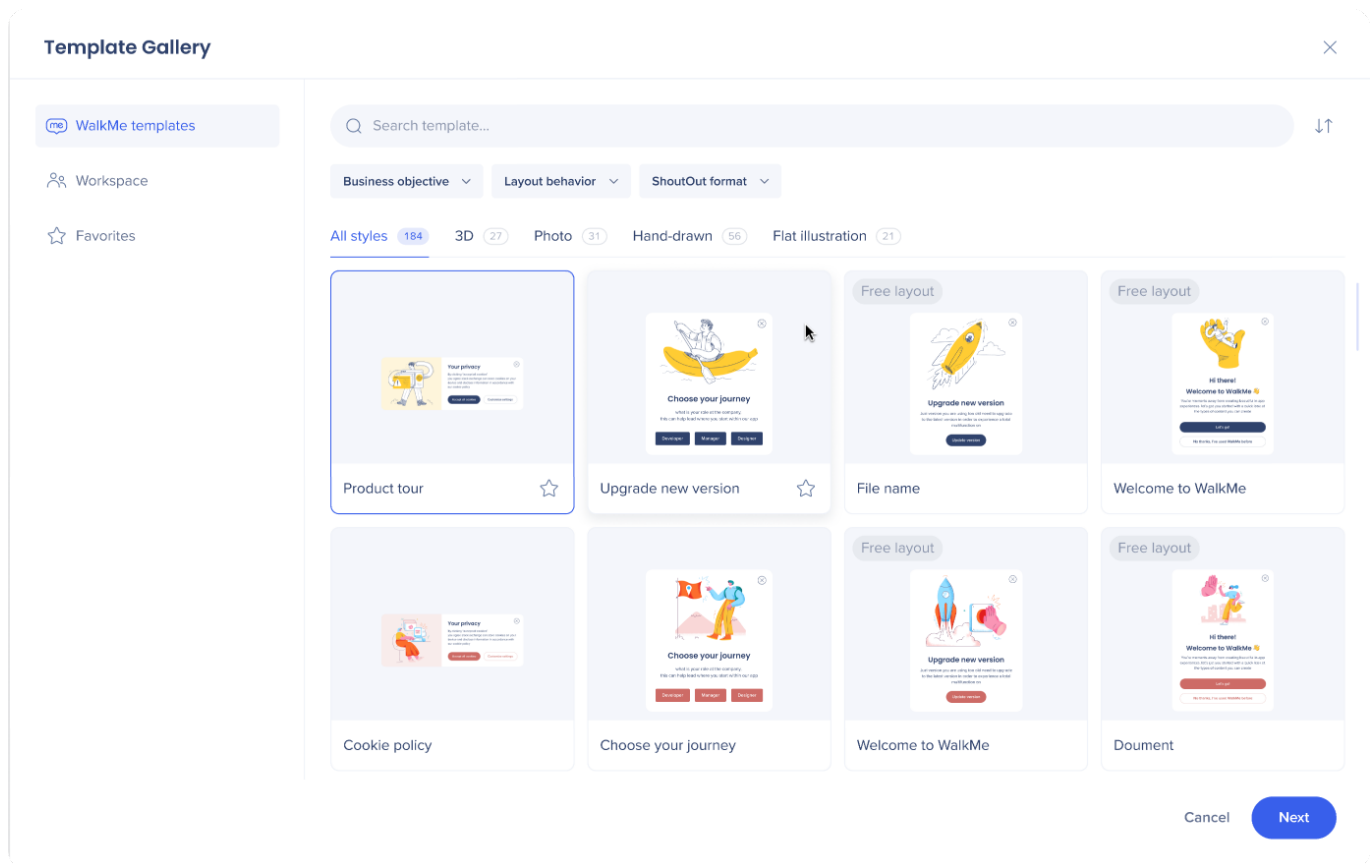
1. Click the **blue plus icon** in the Editor
2. Select **ShoutOut**
3. Type a name for your ShoutOut
4. Click **Continue**



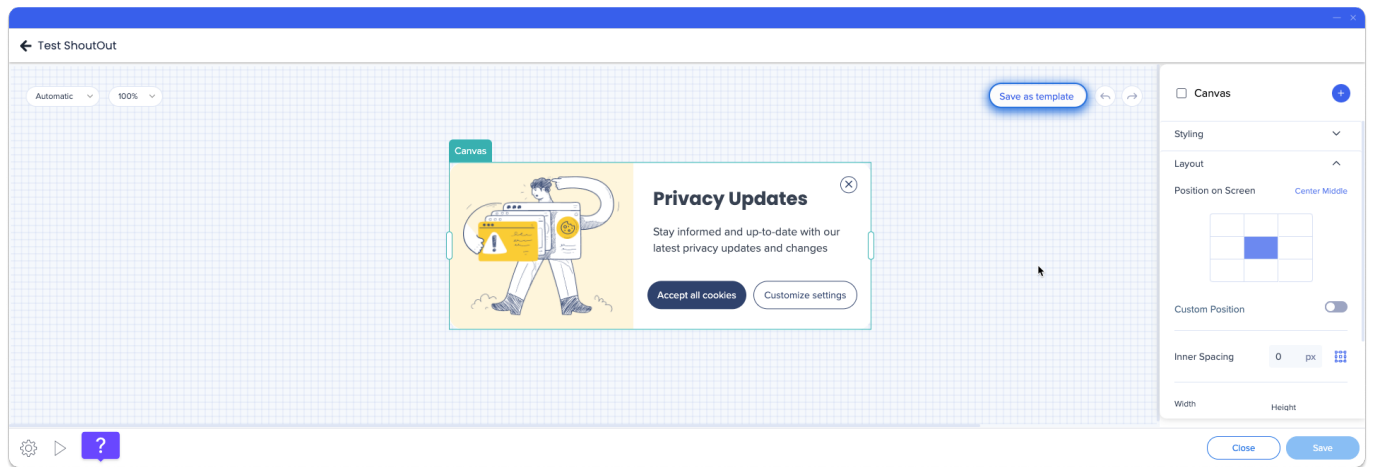
The Template Gallery will open

5. Select a template to edit

6. Click **Apply template**

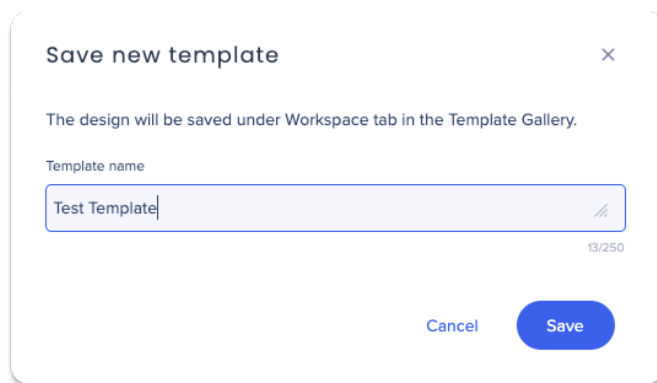


7. Click **Next** once you're done editing
8. Click **Done** after adding any ShoutOut Settings
9. Click **Save as Template**



10. Type a name for your new template

11. Click **Save**



Note:

- **Builder:** For users without admin rights, it will be saved in the Workspace tab and available to this user only
- **Admin:** Users with admin rights will be asked if they also want to share this template with users assigned to the system they're on, or with all users from their organization. If they do, all users will be able to see it

Save new template

×

The design will be saved under Workspace tab in the Template Gallery.

Template name

Product tour

Select who can use this template

Share this template with users assigned to this system

Any user assigned to this system can use this template. Other admins can edit it.

Share this template with users in your organization

Any user in your organization can use this template. Other admins can edit it.

Cancel

Save

## Share Templates

Share option is available **to admins only** from the template menu

Template Gallery

×

WalkMe templates

Workspace

Favorites

Search template...

Layout behavior

Shared with

Product tour

Edited 15 minutes ago

Edit

Rename

Share

Delete

Edited 2 hour ago

File name

Edited 4 days ago

Welcome to WalkMe

Edited 9 months ago

Cookie policy

Edited 9 months ago

Choose your journey

Edited 11 months ago

Welcome to WalkMe

Edited 1 year ago

Document

Edited 1 year ago

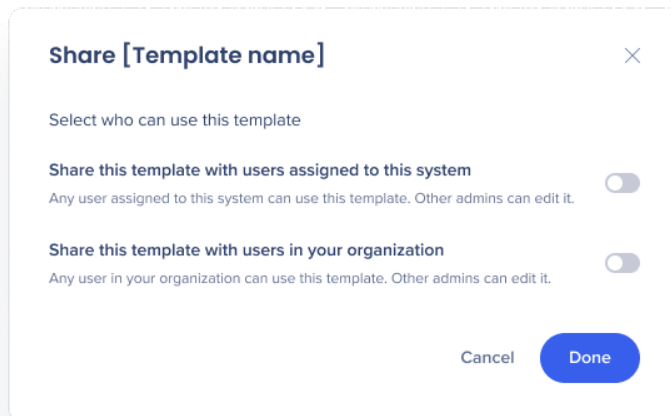
Cancel

Next



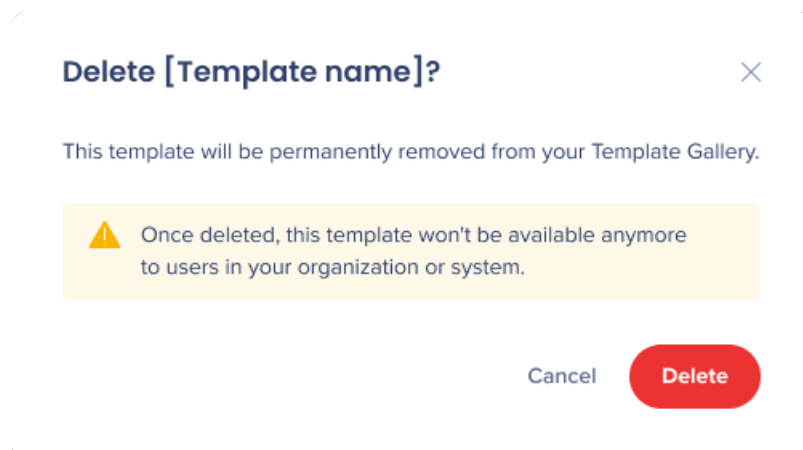
Admins can share their templates with

- Users assigned to a system: Any user assigned to the system can use the template, and other admins can remove it
- Users in their organization: Any user in the organization can use the template, and other admins can remove it



A dialog box titled "Share [Template name]" with a close button (X) in the top right corner. Below the title, it says "Select who can use this template". There are two toggle switches. The first is labeled "Share this template with users assigned to this system" and is currently turned on; below it, a smaller text says "Any user assigned to this system can use this template. Other admins can edit it." The second is labeled "Share this template with users in your organization" and is currently turned off; below it, a smaller text says "Any user in your organization can use this template. Other admins can edit it." At the bottom, there are two buttons: "Cancel" and "Done".

When deleted, the template shared with the system or organization will be permanently removed from all the spaces and won't be available to users anymore.



A dialog box titled "Delete [Template name]?" with a close button (X) in the top right corner. Below the title, it says "This template will be permanently removed from your Template Gallery." Below this is a yellow warning box with a triangle icon and the text "Once deleted, this template won't be available anymore to users in your organization or system." At the bottom, there are two buttons: "Cancel" and "Delete".

## Limitation

The Template gallery is not available for Classic ShoutOuts