

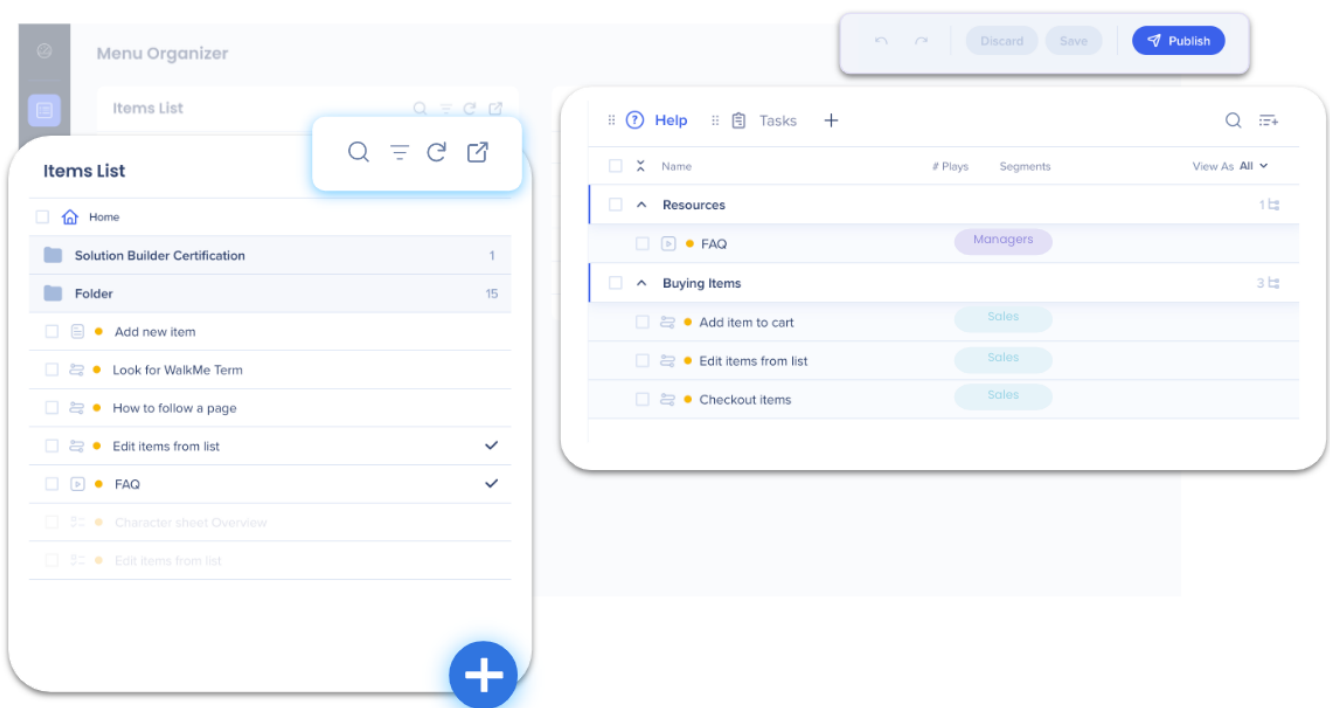
WalkMe Menu Organizer

Brief Overview

The Menu Organizer is your workshop for building and managing your [WalkMe Menus](#). The Menu Organizer displays all of the resources, Onboarding Tasks, and Smart Walk-Thrus that are in your Editor.

With the **Menu Organizer**, you are able to:

- Add items to the Player Menu
- Add Onboarding Tasks to the Player Menu
- Categorize items in the Player Menu
- Create new items

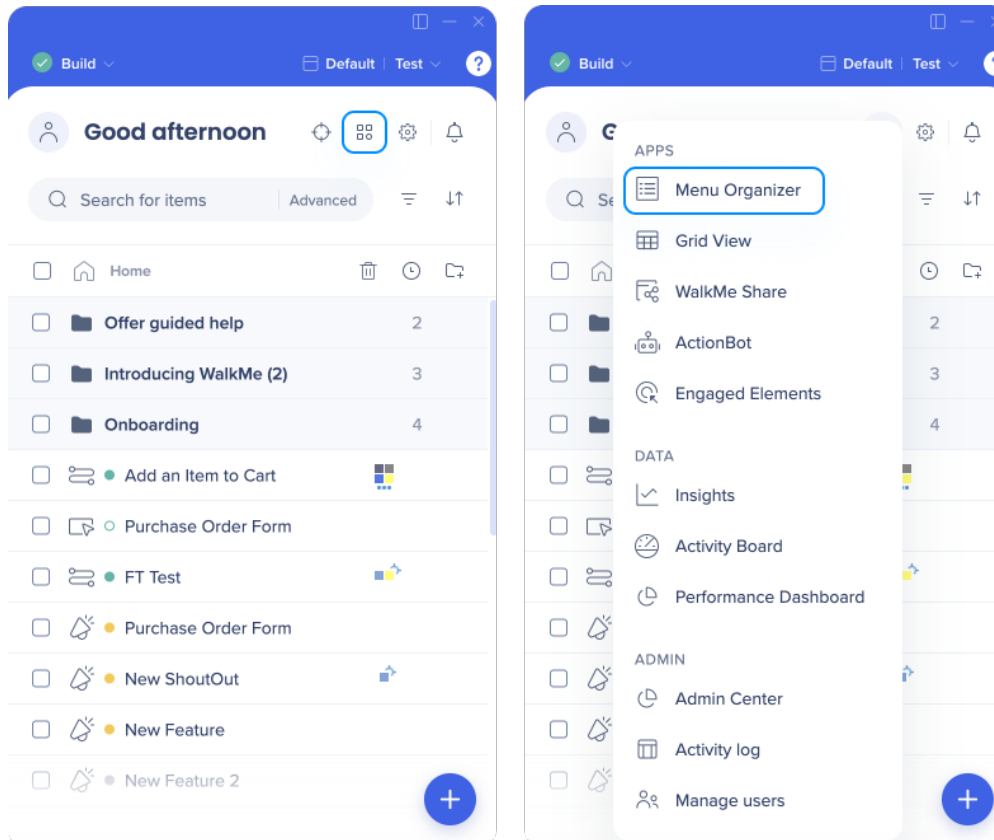


How It Works

Watch this short Introduction Video to get familiar with the Menu Organizer:

How to Access the Menu Organizer

The Menu Organizer lives on the Console and can be accessed via console.walkme.com/menu. You can also access it via the Editor by clicking on the apps icon and selecting Menu Organizer:



Please note:

- The Console supports the latest browser versions of Chrome, Firefox, Safari & Edge Chromium
- Mobile web is not supported

Menu Organizer Overview

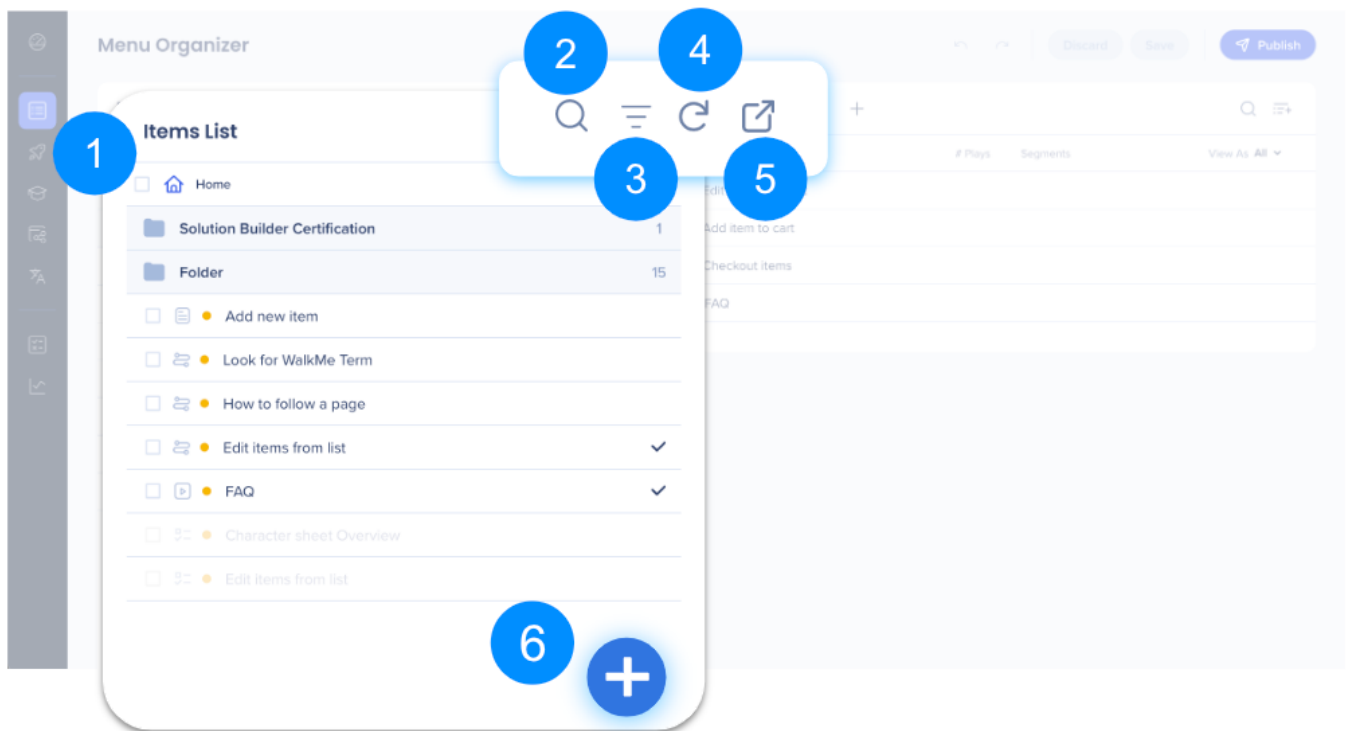
Let's take a look at the layout of the Menu Organizer. The Menu Organizer is made up of two parts:

1. **Left Side Panel** - This side displays all the items that were built in the Editor and can be

added to the Menu Player. Items here are not available to the end-user.

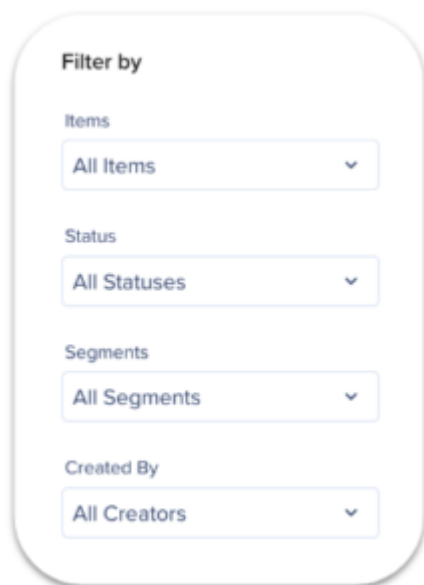
2. **The Right Side Panel** - This side displays the items that will appear to the end-user in the Player Menu.

Left Side Panel



Items in the Left Side panel are the content that has been previously created in the Editor and can be added to the Player Menu via drag and drop. The Left Side panel includes:

1. Item List
2. Search for an item
3. Open filter options:
 - By Item type
 - According to Publish status
 - According to Segmentation
 - By Creator



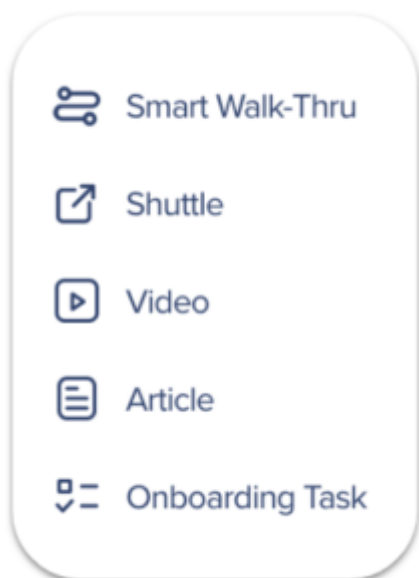
A rounded rectangular filter menu with a light gray border. It contains four sections, each with a label and a dropdown menu:

- Filter by**
- Items**: dropdown menu showing "All Items" with a downward arrow.
- Status**: dropdown menu showing "All Statuses" with a downward arrow.
- Segments**: dropdown menu showing "All Segments" with a downward arrow.
- Created By**: dropdown menu showing "All Creators" with a downward arrow.






Pro-tip

If you have filtered the Item List based on Segments, when you create a new item those Segments will automatically be added to that item. You don't have to search for them again!

4. Refresh Items list
5. Open the Editor
6. Add a new Item
 - **Note:** Adding Smart Walk-Thrus or Onboarding Tasks will redirect you to the Editor.

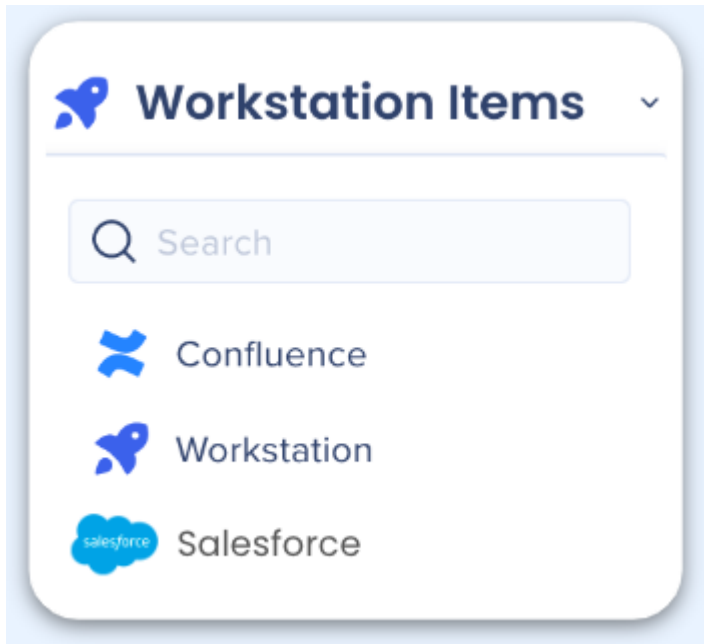


A rounded rectangular menu with a light gray border, listing five options with icons:

-  Smart Walk-Thru
-  Shuttle
-  Video
-  Article
-  Onboarding Task

Workstation Content Manager

You can duplicate items between systems by dragging the item into your **Workstation Menu**.

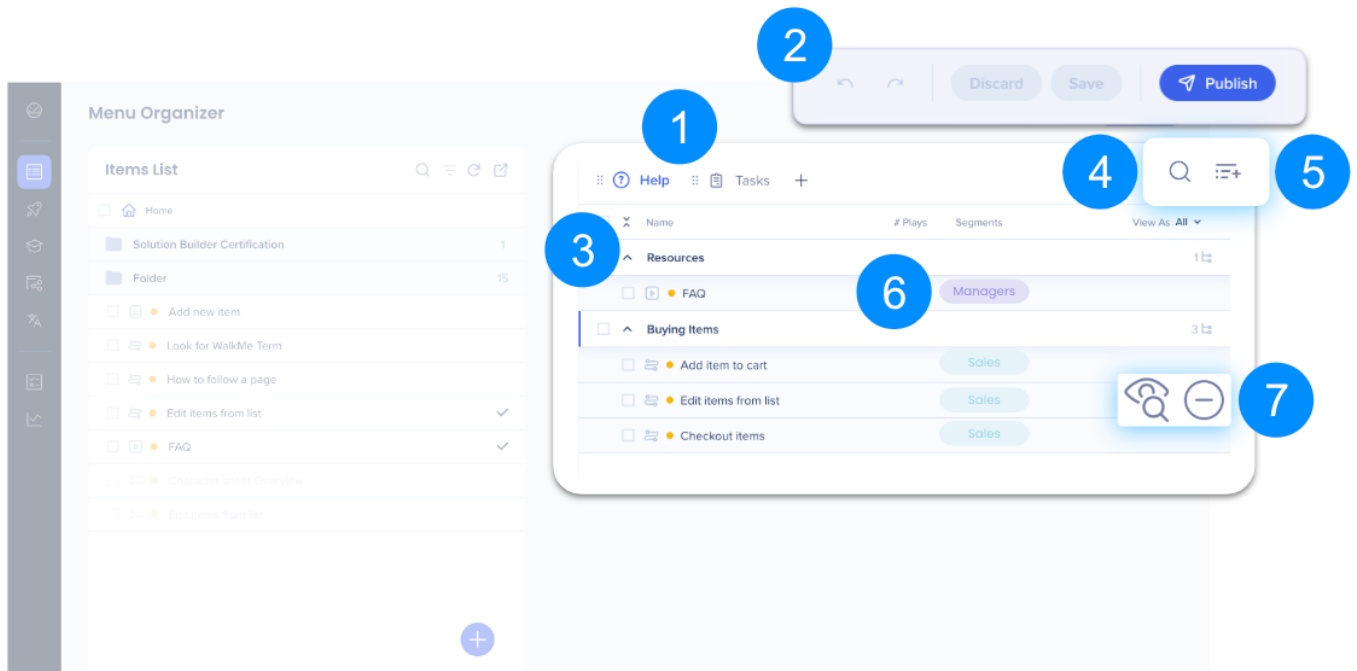


□ **Note:** This feature is not available in the Menu Organizer and can only be used for the Workstation system.

1. From the Workstation Content Manager, click the drop down next to Item List.
2. Select the system that has the item you'd like to duplicate.
3. Drag the item from the Item List to the Menu, just like any other item.

□ **Note:** Items will also be duplicated in the Editor.

Right Side Panel



Items in the Right Side panel are what will be displayed to the end-user in the Player Menu. The Right Side panel includes:

1. Menu Tabs
 - **Note:** Tabs can be renamed and rearranged
2. Action buttons: Undo, Redo, Discard, Save, Publish

Note

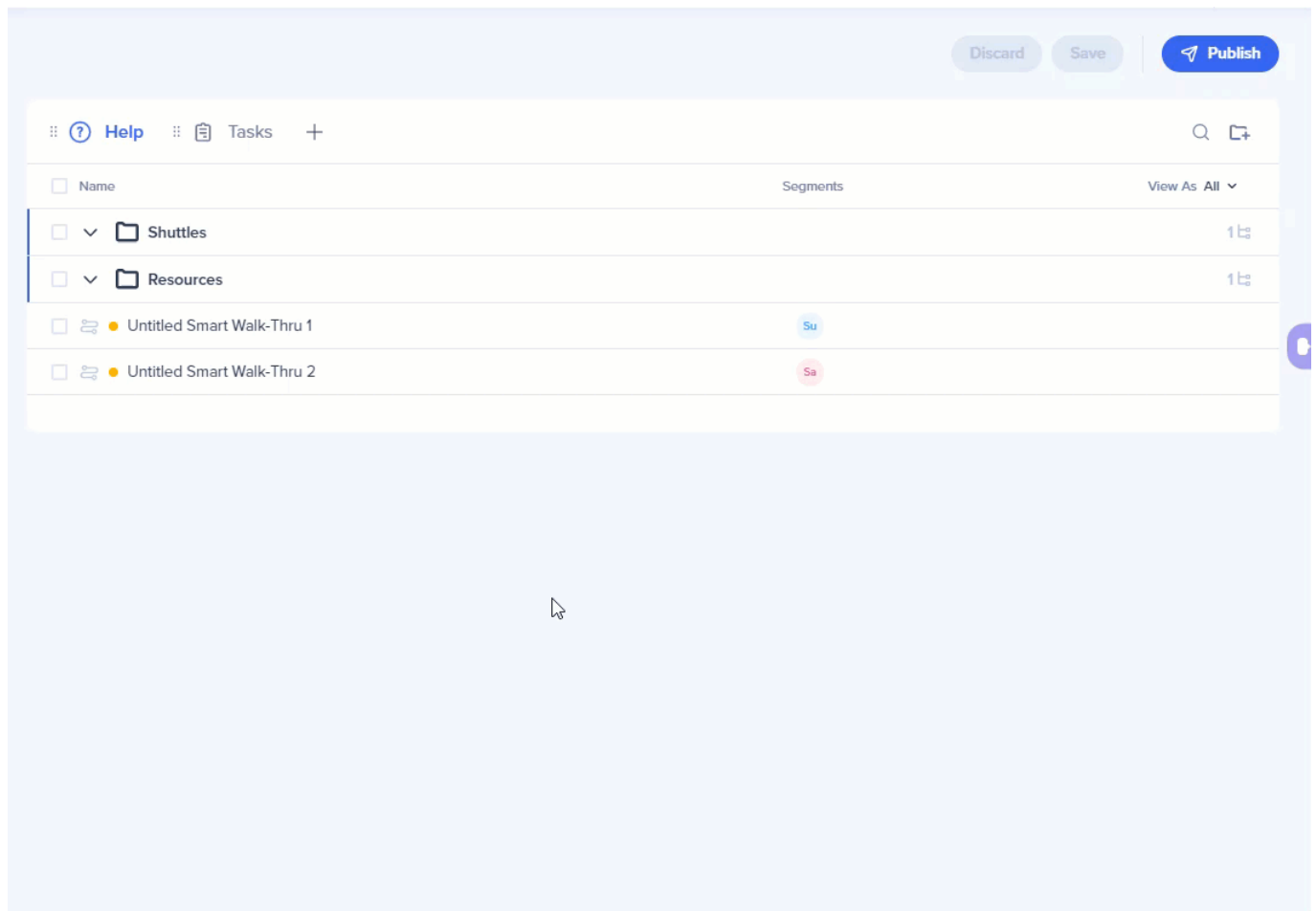
Checking the “Publish all menu items” box will also publish any menu design update you may have.

3. Categories: Items are arranged within designated categories, similar to folders
4. Search for Items in the Menu
5. Add a new category
6. Segments: Displays which segments this item is available to
7. Item Settings:



- a. Show in Search Only: Click this so the item will only appear when searched for and will not display in the WalkMe Player
- b. Remove Item: Click this to remove the item from the WalkMe Player

You can use the arrows to **expand/collapse** all Menu Categories in one click.



Segmentation

Segmentation is available both in **Items list** and in the **Menu**.

The Menu automatically saves the segmentation for the next time you access it. Meaning, the last filter you applied before you closed the Menu Organizer will appear on your next session.

- Segmentation filters will clear should you clear your cache.

Known Issues:

Menu search not returning correct results

- For example, searching “item add” does not return “add item” in the results, or searching “add card” will return the correct item in the search but also shows other items from the rest of the list

Empty tab is visible to user

- No content has been added to one of the Player Menu tabs (for example, Help or Tasks), yet the tab still appears on a Menu

If these occur, [open a Support Ticket](#)

Search only works per tab

- Search across different menu tabs/display results from multiple tabs is not available (each search is specific to a tab)

To get started building your Menu, check out the [WalkMe Menu: Getting Started Guide](#).