

WalkMe Onboard

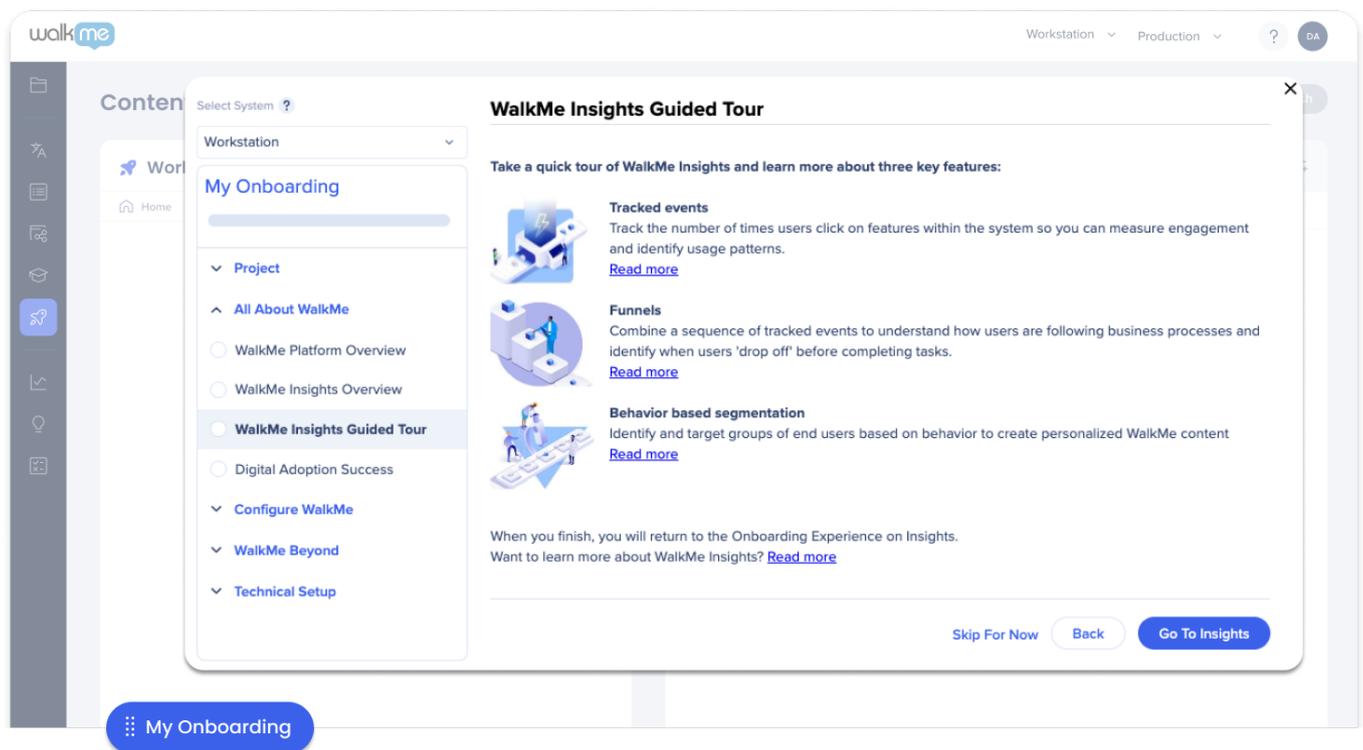
Brief Overview

WalkMe Onboard is a self-paced in-product app that guides new WalkMe users through important steps in the onboarding journey, including:

- An introduction to WalkMe's products and capabilities
- Invitation of other users to the WalkMe platform
- A guided technical setup of the WalkMe platform

WalkMe Onboard offers a tailored experience that is based on your role in the WalkMe project. You can access WalkMe Onboard across all WalkMe domains: [Console](#), [Admin Center](#) and [Insights](#).

Completing the onboarding tasks on the app is **highly recommended before the kickoff call** in order to make the call more valuable and effective.



Get to know

WalkMe Onboard is comprised of **user roles**, **journeys**, and **tasks**. Your role determines which

journey you will take and what tasks will be available.

User roles and journeys

Once you have joined WalkMe, designated administrators within your organization will receive an invitation to WalkMe Onboard and be assigned the Admin role in the [Admin Center](#).

From there, they can invite others and assign the invitees to a role:

- Admin
- Builder
- Content manager
- Publisher
- Analyst
- Translator
- Content viewer
- Content creator

Note

Learn more about [roles and permissions](#).

When a user is added and their role chosen, they will be guided through a WalkMe Onboard journey **specific to their role**.

At the moment there are two journeys:

Admin

Users with admin permissions will be guided through a business review of WalkMe where they can invite other users directly from WalkMe Onboard. They will also be guided through the technical setup, including:

- Accessibility
- Whitelisting
- Browsers
- IDP configuration
- User identification method
- WalkMe end user deployment
- Setting up data integrations
- Single Sign-on

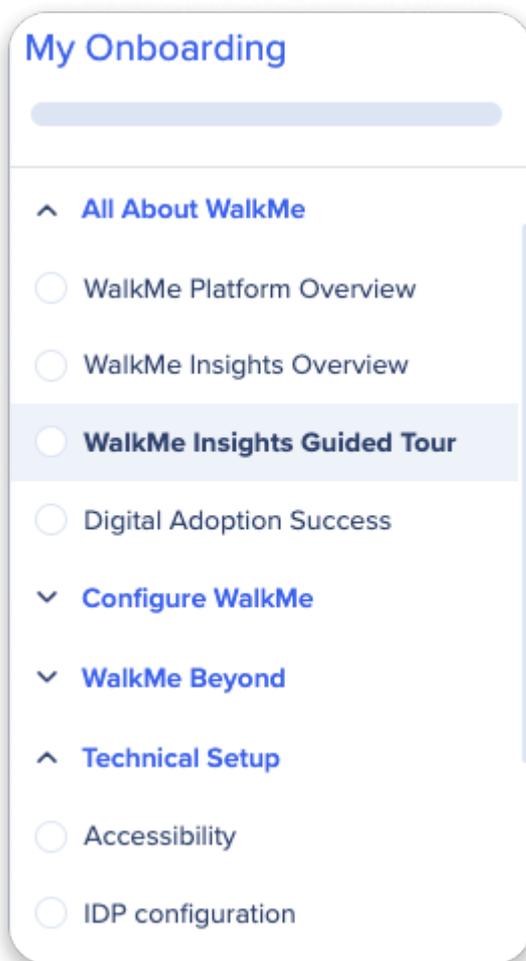
As well as an overview of WalkMe and our products, and introduction to WalkMe community.

Default

The default journey guides users through an overview of WalkMe, help them install the extension, and introduce the WalkMe community

Types of tasks

Each journey is comprised of a checklist with tasks that provide an overview of WalkMe and our products, and help with technical setup.



There are two types of tasks:

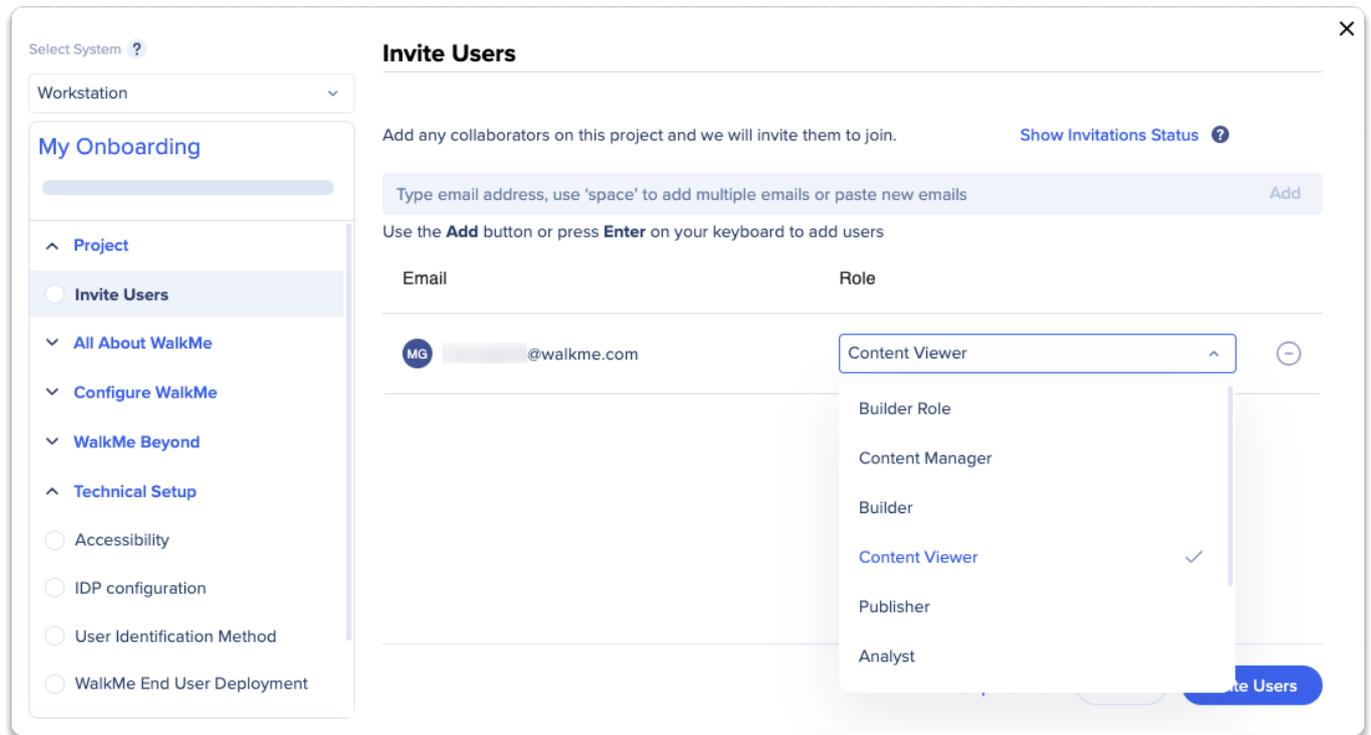
1. **User level task:** When this type of task is completed, the task is marked as complete for all systems, **only** for the one who has completed the task. They will not be asked to complete this task again
 - For example, we won't ask you to watch the video about WalkMe again, if you have already watched it once
2. **System level task:** When this type of task is completed, the task is marked as completed **only**

for this system, for all users. System level tasks need to be completed for each system

- For example, selecting Data Collection level and completing project information. Other users will be able to see the information and edit it if needed

Inviting users

Anyone with “Admin” permissions can invite others.



To invite someone from WalkMe Onboard:

1. Go to the **Project** tab > **Invite Users** tab
2. Type the **email** of the person you are inviting
3. Click **Add** or press **Enter** on your keyboard
4. Under Role, select the relevant role (this will be reflected in the Admin Center’s User & Permissions page)
 - See the [Admin Center - User & Roles KBA](#)
5. Click **Invite Users**
 - The invited person will receive an email to start the onboarding process

View user invitation status

Click User Invitation Status to view a list and invite status of the users to whom you sent invites!