

WalkMe Onboard

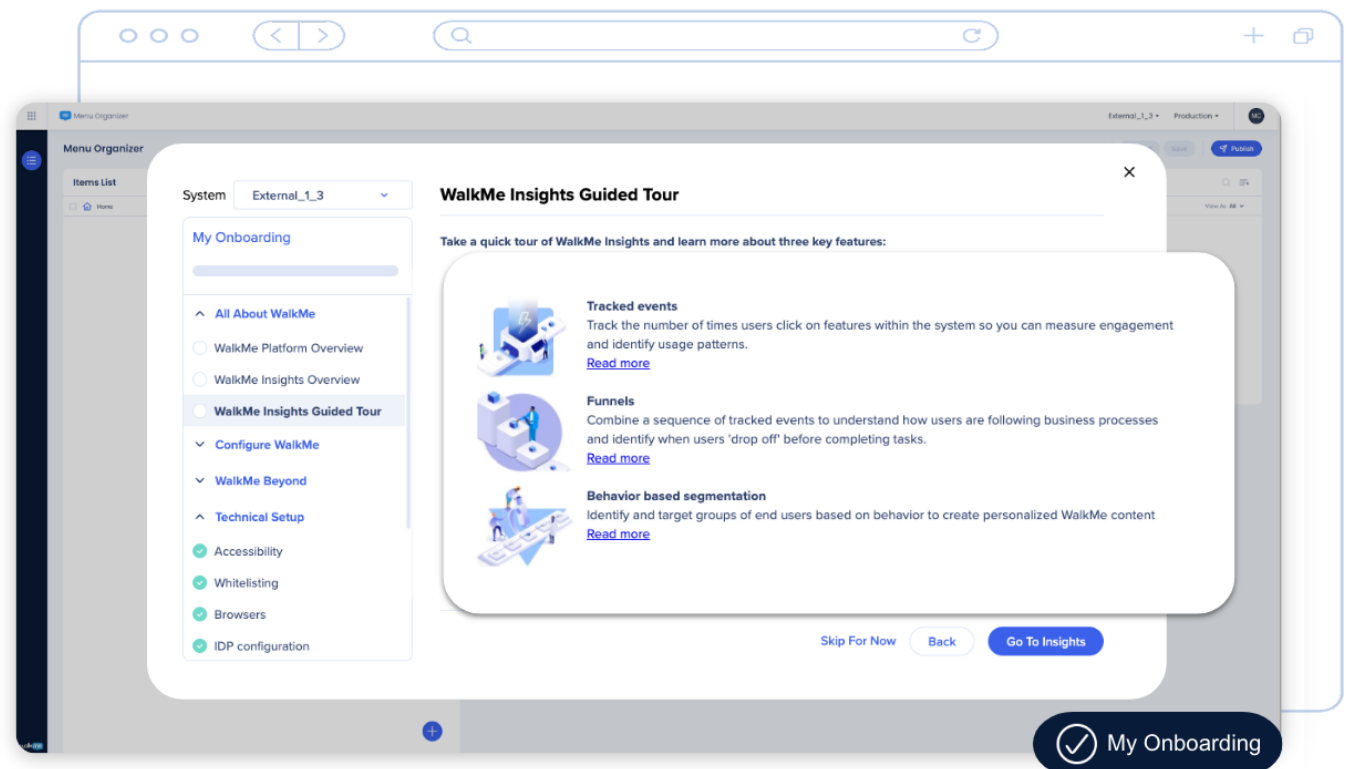
Brief Overview

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 the 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

Upon accessing WalkMe Onboard, you will select between 11 roles based on your role in WalkMe project which will create a unique onboarding experience tailored to your needs.

See below a description of each role based on their journey so you can select the correct path for all your WalkMe roles:

Journey 1: Builder

The builder journey is built with builders in mind! Builders are the people that design, create, and build WalkMe content on the WalkMe Editor.

Journey 2: Decision Maker

The Decision Maker journey is designed for the person who reviews content built in WalkMe, manages quality assurance, and ensures content aligns with project goals.

Journey 3: Project Manager

The Project Manager role is the primary point of contact for a WalkMe initiative, aligning stakeholders and managing timelines. May not have WalkMe specific expertise, but is has a strong background in program and project management.

Journey 4: IT Contact

This journey is designed for your IT or Technical lead. This person is the technical expert who manages deployment of WalkMe and supports WalkMe Builders and Project Managers with more technical tasks e.g. IT Systems Manager, Lead Engineer, Product Manager.

Journey 5: Default

Every other role will follow a default journey that will review the basics of building and managing WalkMe content. This journey includes the following roles:

- **Content Reviewer** - Key stakeholder in the vendor selection process and decision to partner with WalkMe.
- **Analyst** - Analyzes and optimizes program impact using WalkMe insights and company data.
- **Designer** - Ensures WalkMe content aligns with the design and brand of applications and their company.
- **Quality Assurance** - Tests WalkMe content, including UAT, UVT, test scenarios, and approach.
- **Subject Matter Expert** - Expert in the processes and users of the system WalkMe content is being applied to (e.g. Salesforce, Workday or other). SMEs might not have expertise in WalkMe.
- **Executive Sponsor** - Defines strategic goals for digital transformation that influence the digital adoption strategy and WalkMe program creation.

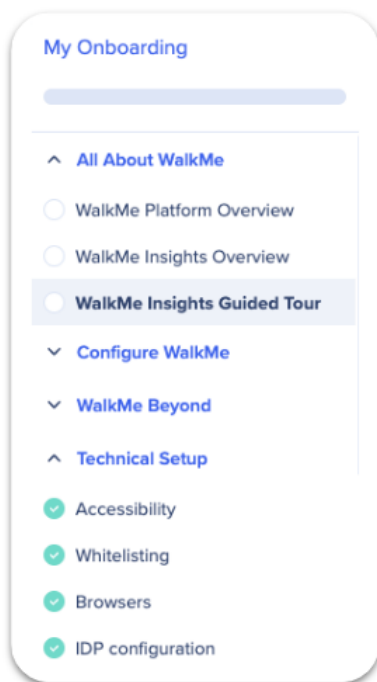
- **Digital Adoption Leader** - Aligns digital adoption strategy with organizational goals. Socializes WalkMe business objectives, communicates key outcomes and drives digital adoption within organization.

Note

You can have more than one role.

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.



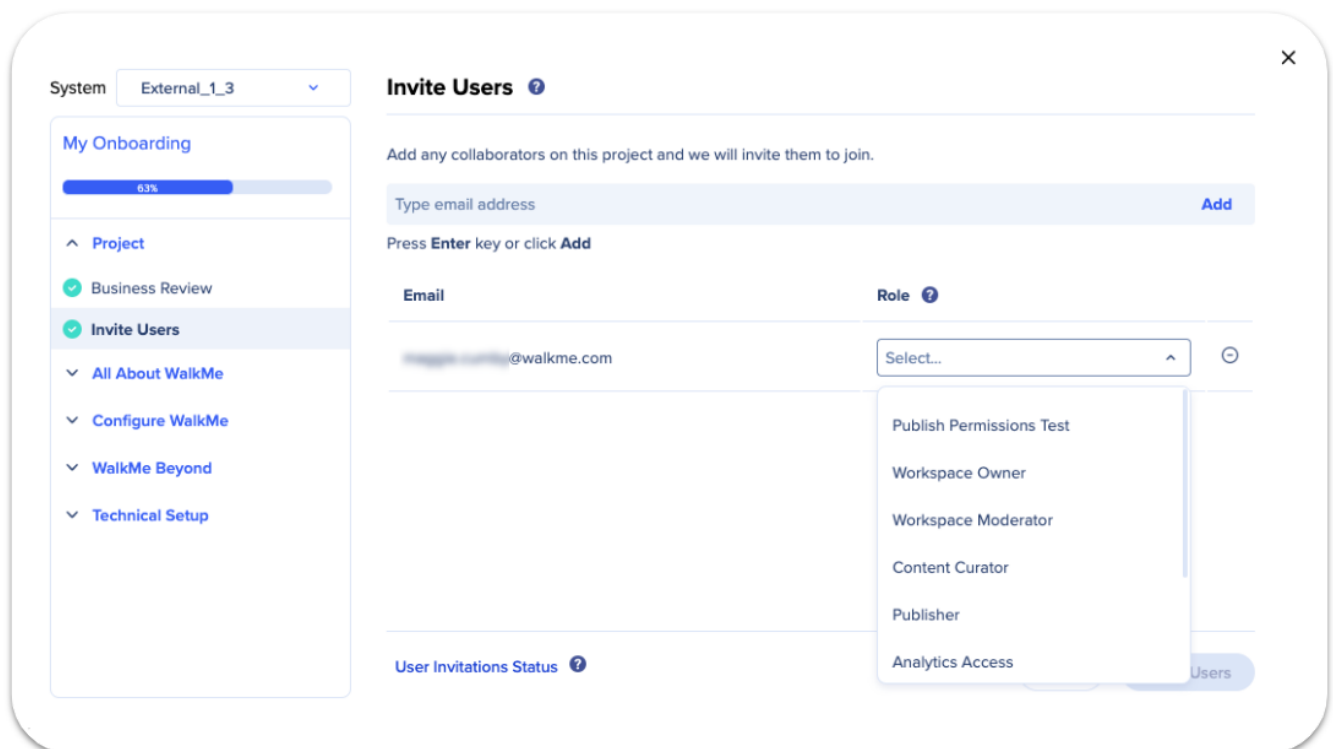
There are 2 types of tasks:

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 **Project > Invite User**.
2. Type the **email** of the person you are inviting.
3. Click **Add**.
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 User**.
 - 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!