

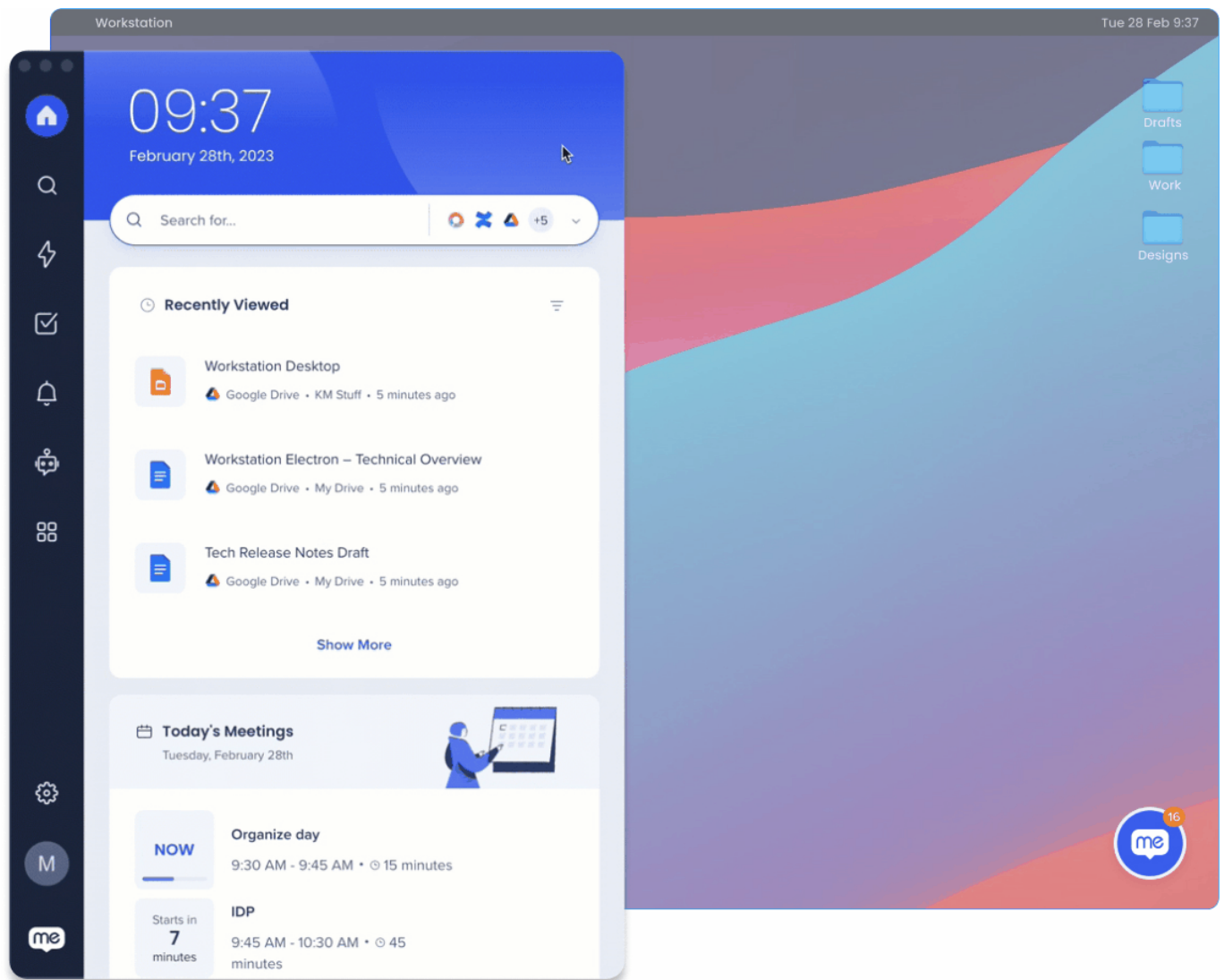
# Welcome to Workstation

## Brief Overview

Workstation is your desktop companion. It provides a centralized hub for all of your work applications, making it easy to find and access everything you need in one place. This way, you don't have to switch between different applications all day, saving time and increasing productivity.

This article is an overview of the Workstation experience after it's been deployed in your organization. It will review how to get started with Workstation, how you can use it, and what to expect.

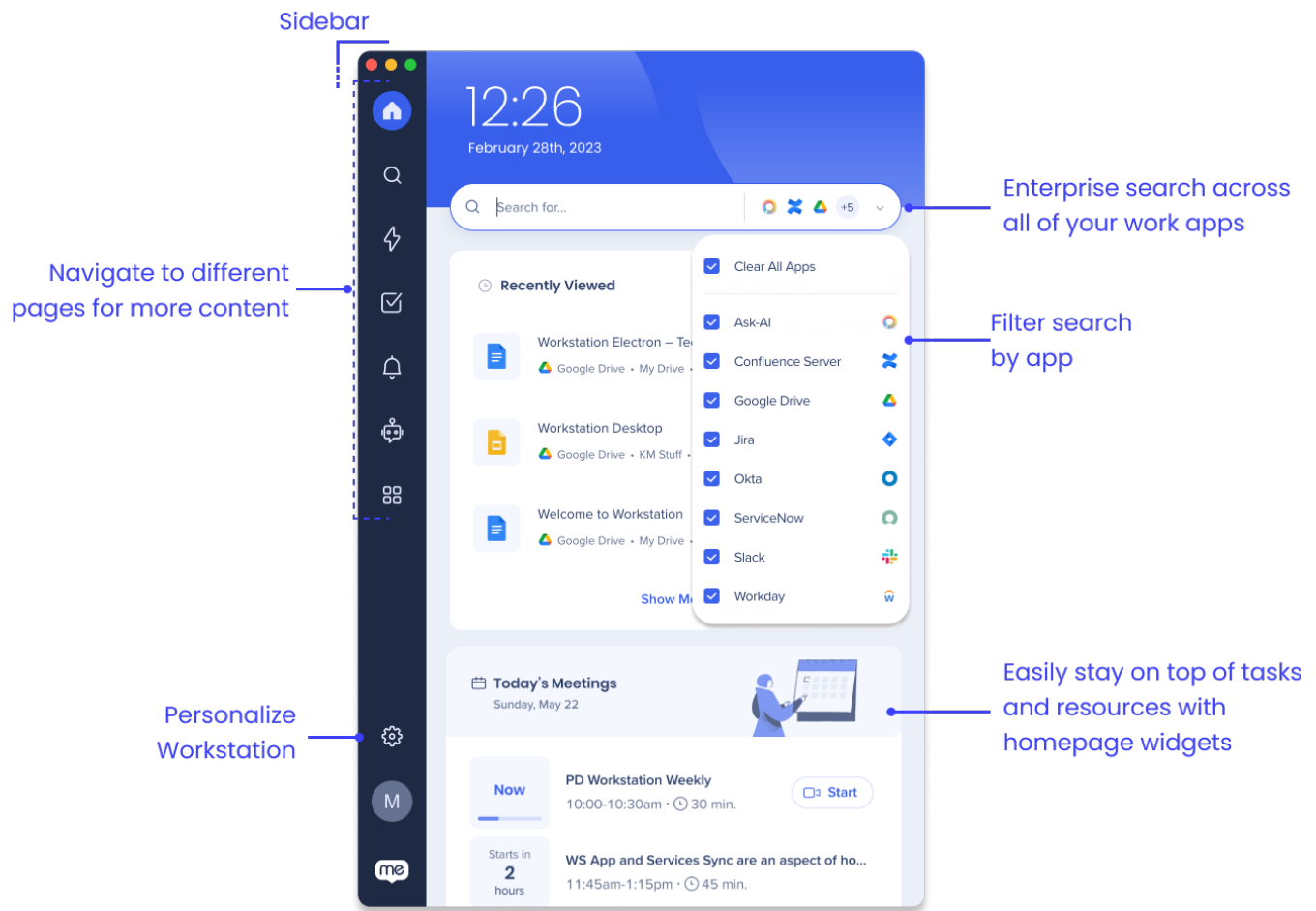
In the end, Workstation is your companion and how you use it depends on what kind of support you need during your work day.



## Note on available features

Your organization may have customized Workstation and some features described in this article may not apply to you. We've indicated which features can be enabled or disabled by the WalkMe admin at your organization.

## Get to Know



Workstation can be used for a variety of purposes. Here are some examples of how Workstation can help you:

- Manage tickets or tasks that you're assigned to or reviewing with homepage widgets, allowing you to prioritize your workload more efficiently
- Get notified on important updates from your organization via desktop notifications
- View content curated by your organization for you, ensuring that you have access to the most up-to-date and relevant resources
- All-in-one search, saving you time to find information across all of your apps

## Workstation terms

To help you get to know Workstation here's a quick terminology review:

- **Integrations:** Workstation integrations are the apps that you connected to your Workstation. Some apps are enabled by default by your organization, and other apps you can decide to connect by going to the Apps Integration page
- **Widget:** Some integrations have homepage widgets that display helpful information from that

app

- **Bubble:** Open Workstation with the drag and drop icon that is always available on your desktop screen

## Accessing Workstation

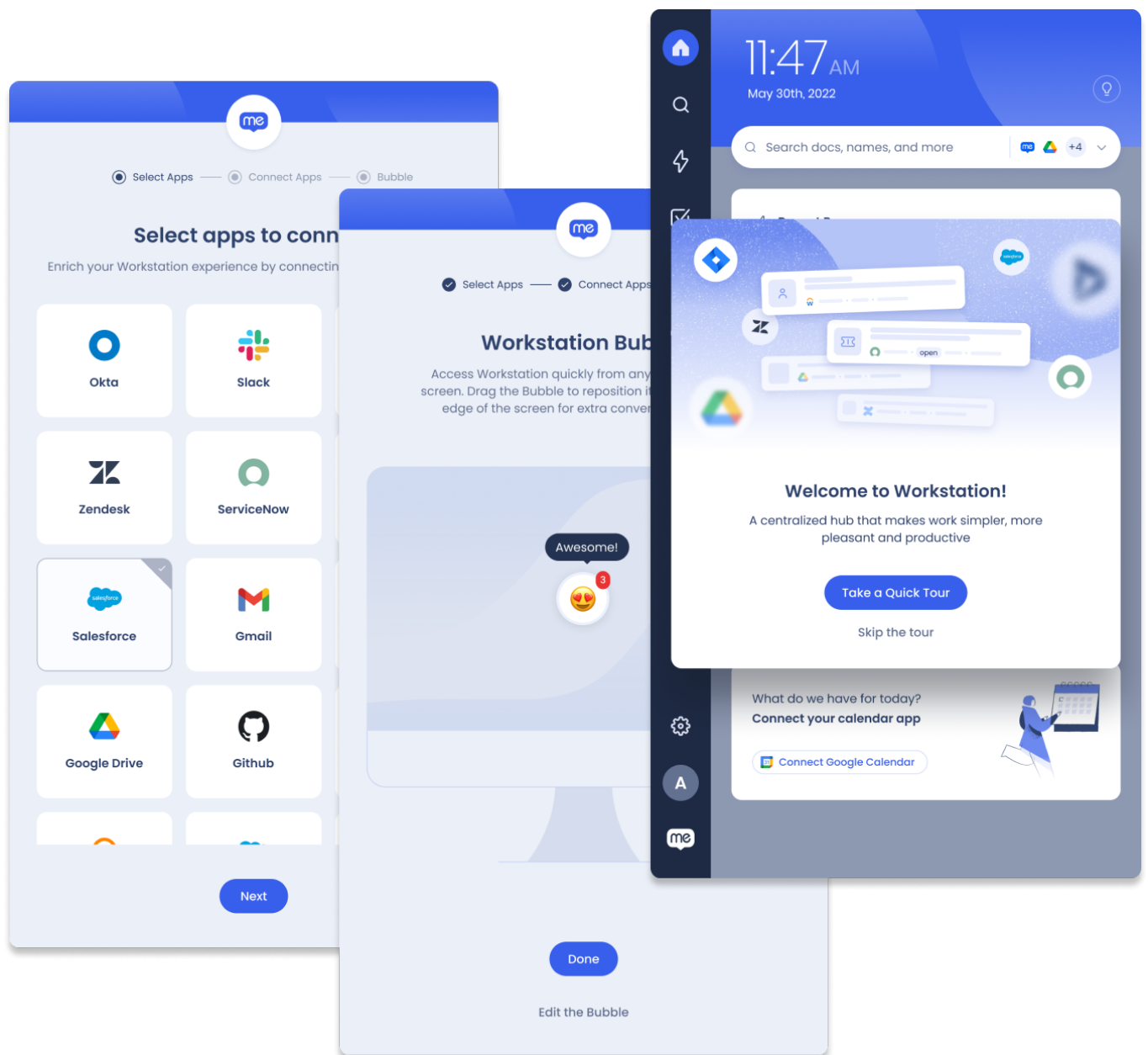
Depending on how your organization deployed Workstation, you can either open Workstation from the on-screen Bubble on your desktop or simply search for it in your application list.



If this is your first time opening Workstation, click the **Sign In** button, which opens your browser so you can log in with your work email.

## Workstation Product Tour

If your organization enabled integrations for Workstation, you will be guided through a brief onboarding experience that includes connecting your work apps and a quick tour of Workstation's interface.



The onboarding experience is only available if your organization enabled app integration

Choose your preferred language

Before you begin the onboarding experience, you can select which language your preferred language for Workstation.

Workstation and the onboarding flow is localized (translated) into the following languages:

- English
- Portuguese

- Spanish
- German
- Chinese Simplified
- Turkish
- Japanese
- French
- Korean (**NEW**)

After selecting the preferred language, click **Save My Preferences**. Workstation will switch to that language and then continue the onboarding experience.

You can change the application language anytime in **Settings -> Preferences**.

## Setup Wizard

The setup wizard starts the first time you sign-in to Workstation and lets you quickly connect all of the apps you need so that Workstation will be ready for you when you first use it.

### To setup integrations via the wizard:

1. Select all of the apps that are relevant to your work
2. Click **connect** for each app
3. Sign-in to the app
4. Continue for each app
  - If you changed your mind and don't want to connect an app, click **Skip Step**

You can add or remove integrations later by going to the **Settings** page -> **Integrations**.

Read more about integrations in the Integrations section of this article, or [review all the available integrations](#).

## Customize your Bubble

The next step in the onboarding experience is to customize your Bubble:

1. Click **Customize Bubble** to open a list of emojis
2. Choose your new Bubble emoji
3. Click **Done**

Finally, you'll be asked if you want to take a quick product tour.

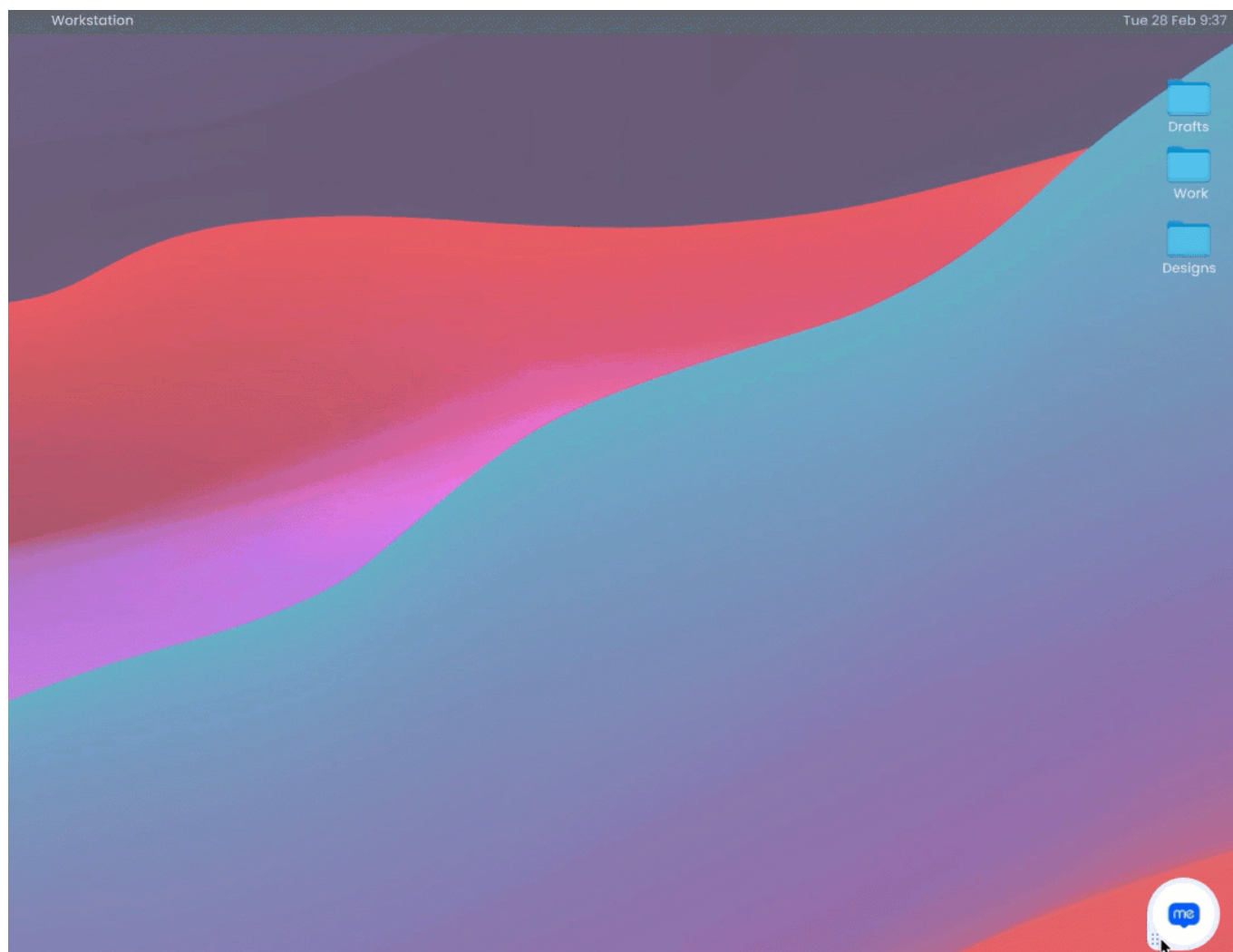
Didn't get to experience the onboarding?

You can access it anytime, in the **Settings** page-> **Help-> Start Product Tour**



## Workstation Bubble

The Bubble is a drag and drop icon that opens Workstation. You can move it around and place it anywhere on your screen. It can float on the screen, or snap to the side. It's always accessible so you can quickly open Workstation anytime you need it!



You can customize the Bubble with an emoji of your choice to add a little fun to your screen, or turn it off if it's not your style.

[Learn more about the Workstation Bubble and how to customize it.](#)

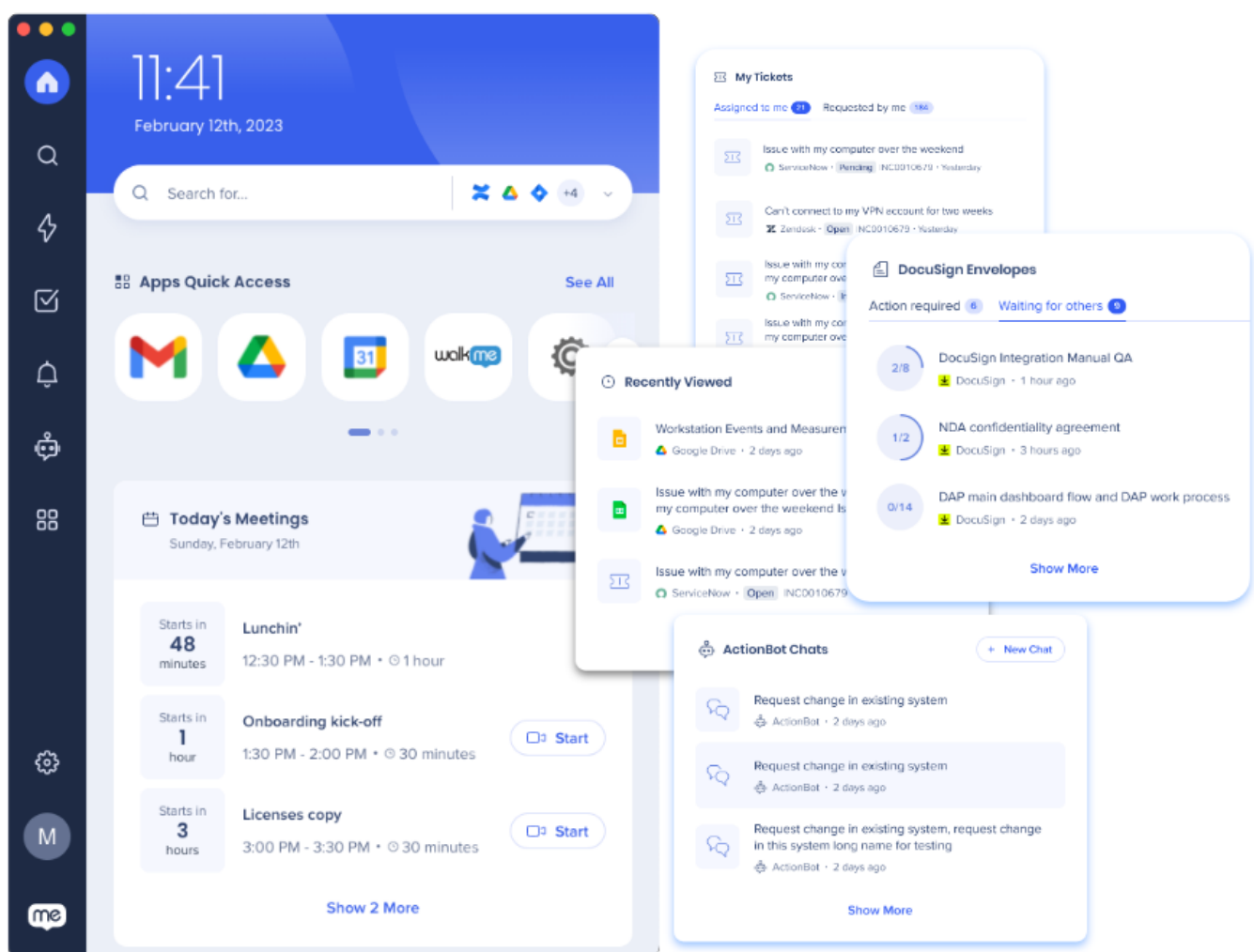
## Homepage

From the Workstation homepage, you can:

- Search across all of your resources and integrated apps with the search bar
- Interact with the homepage widgets for a quick view of your tickets, tasks, or content

## Widgets

Some of the app integrations come with a homepage widget. Widgets provide a brief overview of whatever is going on in that application. For example, the ServiceNow widget displays tickets assigned to you or requested by you. The Calendar widget, which can integrate with Google or Outlook calendars, lists your next meetings including one-click access to the virtual meeting room, like Zoom.



If the integrated app has a widget, it will be automatically added to the homepage.

[Learn more about homepage widgets and widget management.](#)



## Search

Workstation's enterprise search functionality allows you to quickly find the information you need from across your organization, eliminating the need to spend time searching through multiple applications or resources. This can save you time and increase productivity.

Simply search for the content in the search bar and Workstation will look throughout the integrated apps and resources.

You can also filter the search to specific apps:

1. Click the dropdown next to the search bar
2. Select the apps you want to limit the search to

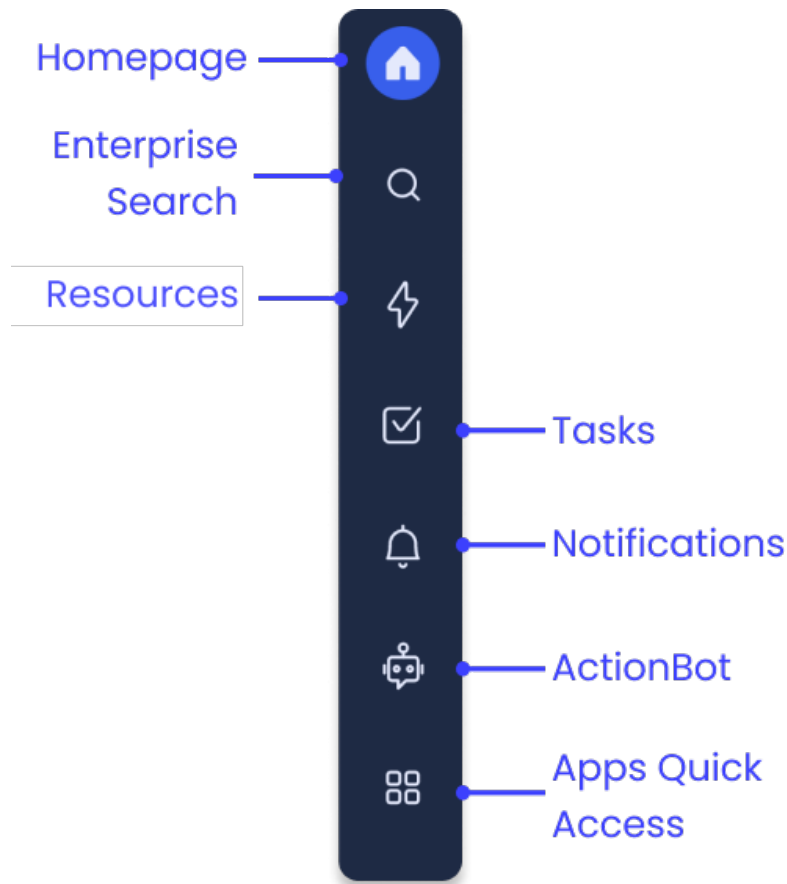
## Recent Searches

You can view your recent searches by clicking into the search bar, or check out the Recently Viewed widget to view the content that you most recently interacted with.

[Learn more about Workstation Enterprise Search.](#)

## Sidebar

The Workstation sidebar is how you navigate to different Workstation pages. What appears in your sidebar is dependent on how your organization configured Workstation.



The sidebar can include the following:

- **Homepage**: Available on all Workstations
- **Search**: Available on all Workstations
- **Resources**: Enabled by your organization if they connected WalkMe Resources
- **Tasks**: Enabled by your organization if they connected WalkMe Onboarding Tasks
- **Notifications**: Available on all Workstations
- **ActionBot**: Enabled by your organization if they connected a WalkMe ActionBot conversation
- **Apps Quick Access**: Enabled by you if you connect your Okta to Workstation

## Resources

The Resources page is where you can access information curated by your organization. These are WalkMe Resources, which is an item that is built using WalkMe. Resources include articles and videos and they can be segmented to target specific people based on department, location, or other filters. So if you see a Resource in the Resources page someone in your organization made it just for you!

Use the Recent Resources widget to quickly find the WalkMe resources you use most.

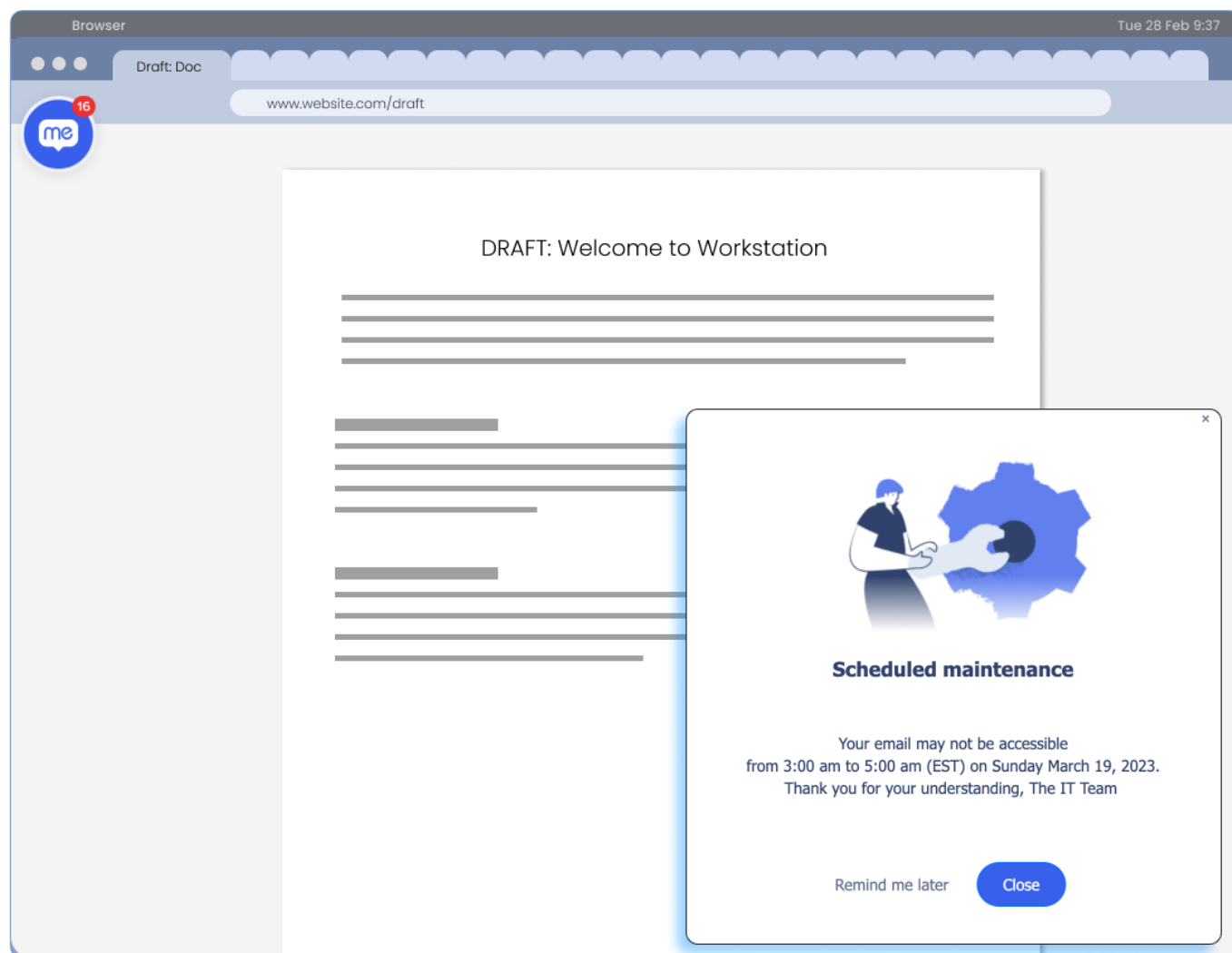
Are you a WalkMe Builder?

If you are a builder and will be creating Resources for Workstation, these articles might be helpful to you:

- [Resources](#)
- [Content Manager](#)
- [Displaying Resources in Workstation](#)

## Notifications

Don't miss out on anything! Workstation offers a communication hub for your organization to keep you updated on what's going on. Notifications can be sent as a push notification or a pop up. Push notifications appear in your computer's notification tray. Pop ups, on the other hand, appear on your screen.



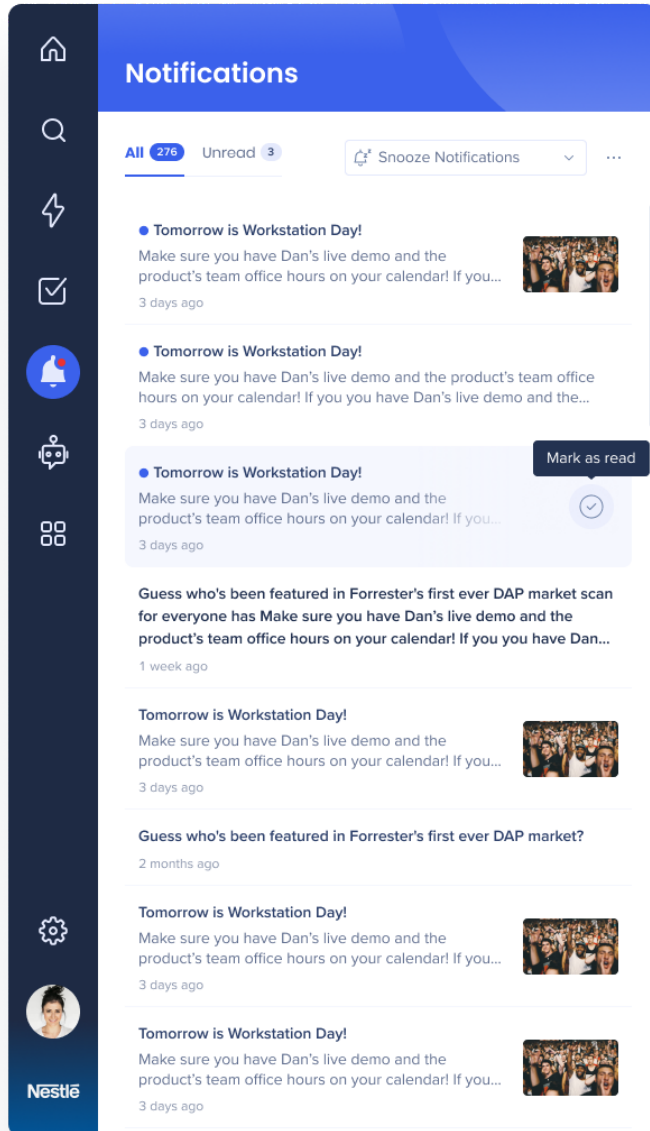
In both cases, your Workstation bubble will have a red indicator to let you know that you have unread notifications. You can read all your unread notifications in the Notification page.

From the Notifications page you can:

- View all live notifications:
  - Click a notification to open it in full
- Snooze notifications:
  - Select how long you want to snooze notifications from the dropdown
  - Notifications will appear in your notification list, but you won't be notified
- Mark all notifications as read:
  1. Click the **three dot menu** in the corner
  2. Click **Mark all as read**

Notifications are made in the [WalkMe Console Communication Center](#). From here, the Communicator (the person who makes and sends the notification) can determine how long the

notification is available in your notification list. After a notification's timeline has ended, it will no longer be available in the list.



## Are you a Communicator?

If you are a Communicator and have access to the WalkMe Console and Communication Center, these articles might be helpful for you:

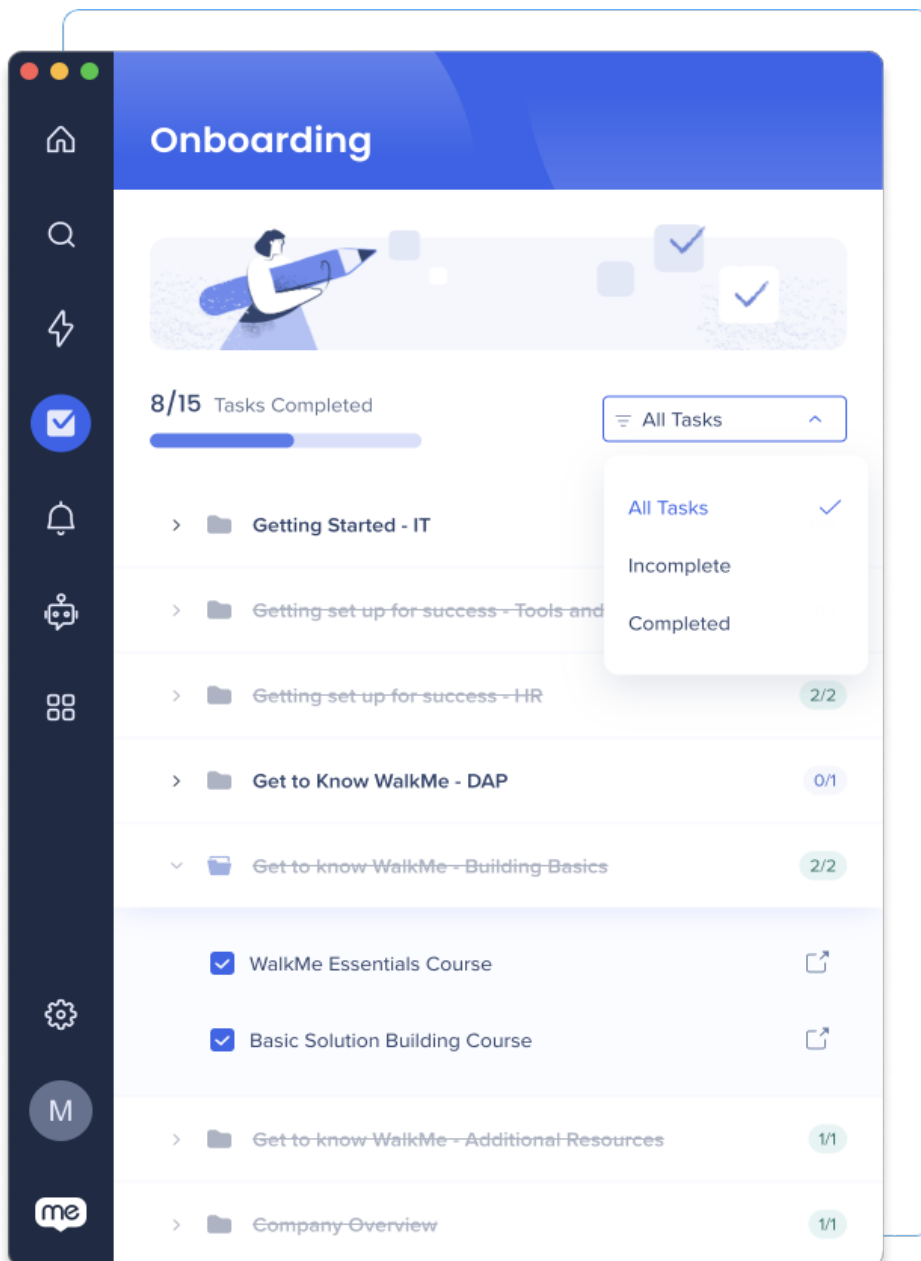
- [WalkMe Communication Center](#)
- [How to Create and Send Notifications](#)

- [Communications Center Visual Designer](#)

## Tasks

The Tasks page in Workstation is a helpful resource for new employees to get started with the organization or role. Just like Resources, the tasks are made by your organization and segmented for you. Tasks are built with WalkMe items and can help you get started in your new role, such as walking you through creating a profile, signing up for HR benefits, or setting up an expense account.





Tasks is an enabled feature so it will only be available on your Workstation if your organization added Tasks. The name of this page may change depending on the tasks were built.

As you complete each task, your progress will be updated in the progress bar. By following this checklist, you can accelerate your training and improve your understanding of your organization and role.

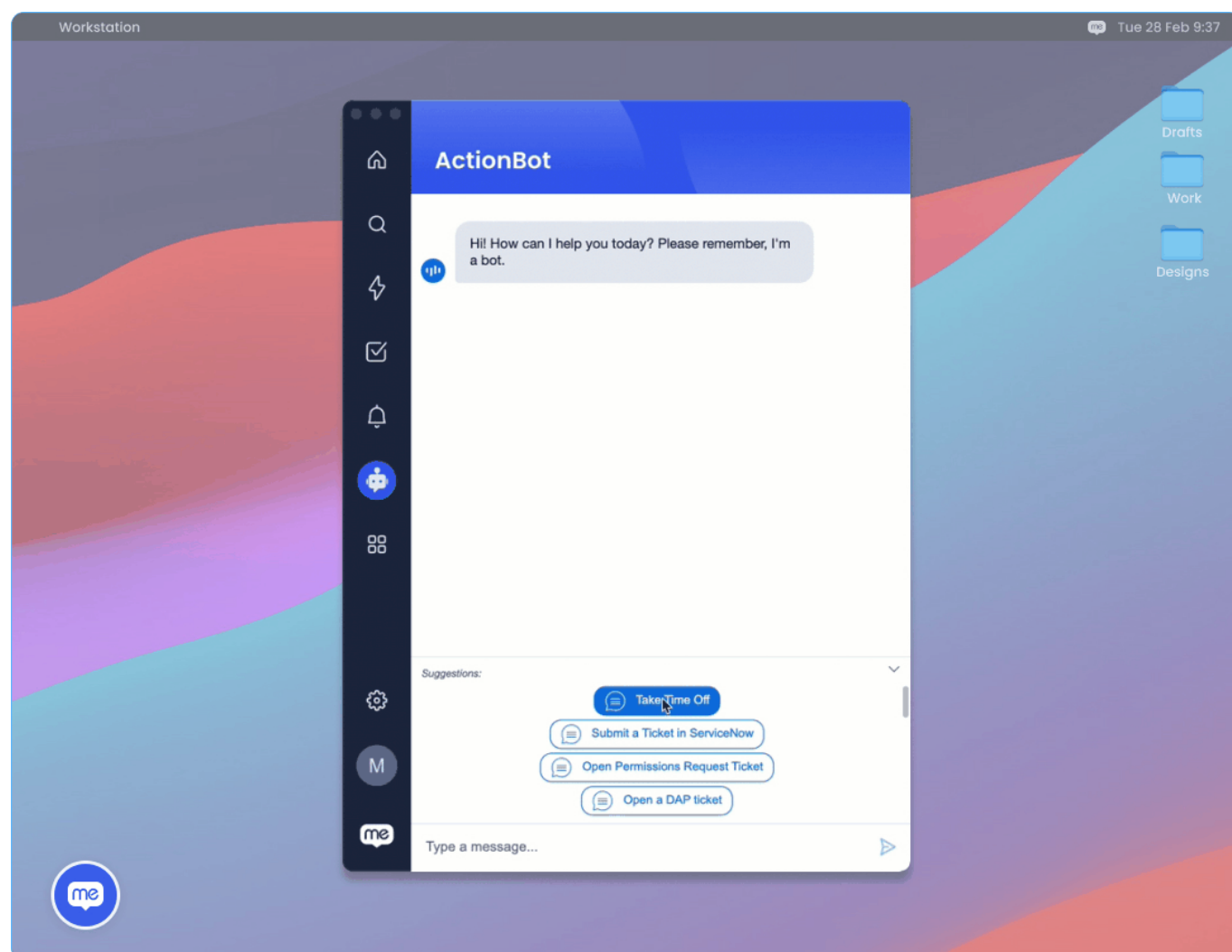
Are you a Builder?

If you are a Builder and have access to the WalkMe Console and Content Manager, these articles might be helpful for you to publish tasks to Workstation:

- [Workstation Tasks: Onboarding](#)
- [Content Manager](#)

## ActionBot

Workstation's ActionBot can help you navigate complex processes or find important resources, eliminating the need to spend time figuring things out on your own. This saves you time and reduces frustration, allowing you to focus on more important tasks.



ActionBot is an enabled feature so it will only be available on your Workstation if your organization built an ActionBot

The ActionBot utilizes WalkMe items like Smart Walk-Thrus or AutoPlay to complete tasks for you. For example, ActionBot can help submit a request for time off. The Bot will converse with you to collect the information it needs to submit the time off form. Then, it launches a Smart Walk-Thru to fill in all of the data on your org's HR platform.

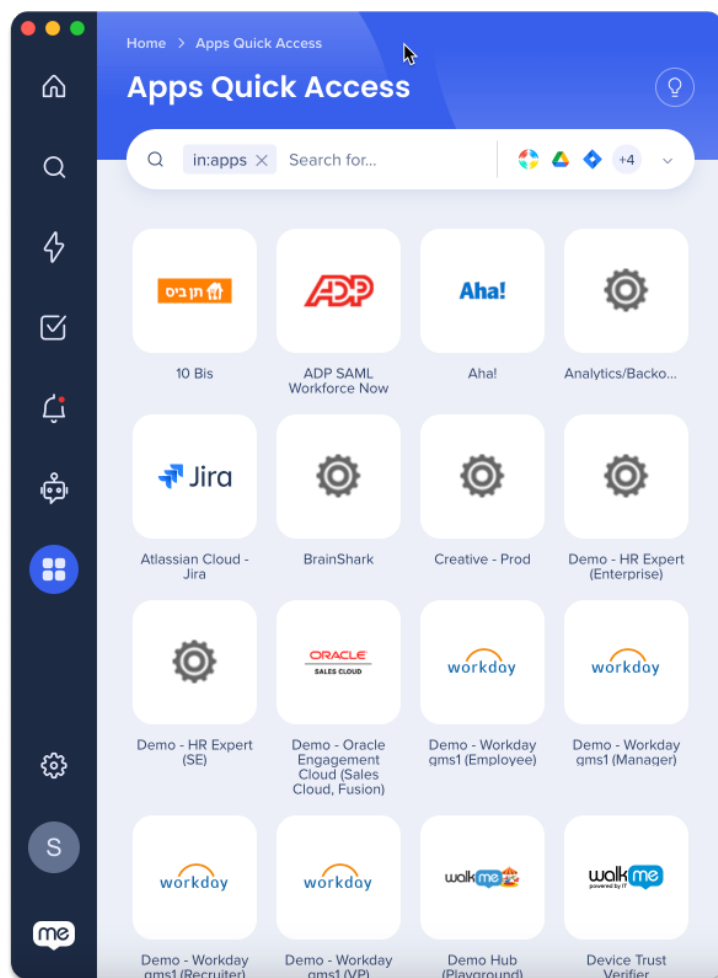
Are you a WalkMe Builder?

If you are a builder and will be creating ActionBot conversations for Workstation, these article might be helpful to you:

- [How to Build an ActionBot](#)
- [How To Create an ActionBot Conversation](#)

## Apps Quick Access

The Apps Quick Access page is available if you have the Okta integration. The page lists all of your Okta applications so that you can easily view and find the app you need.



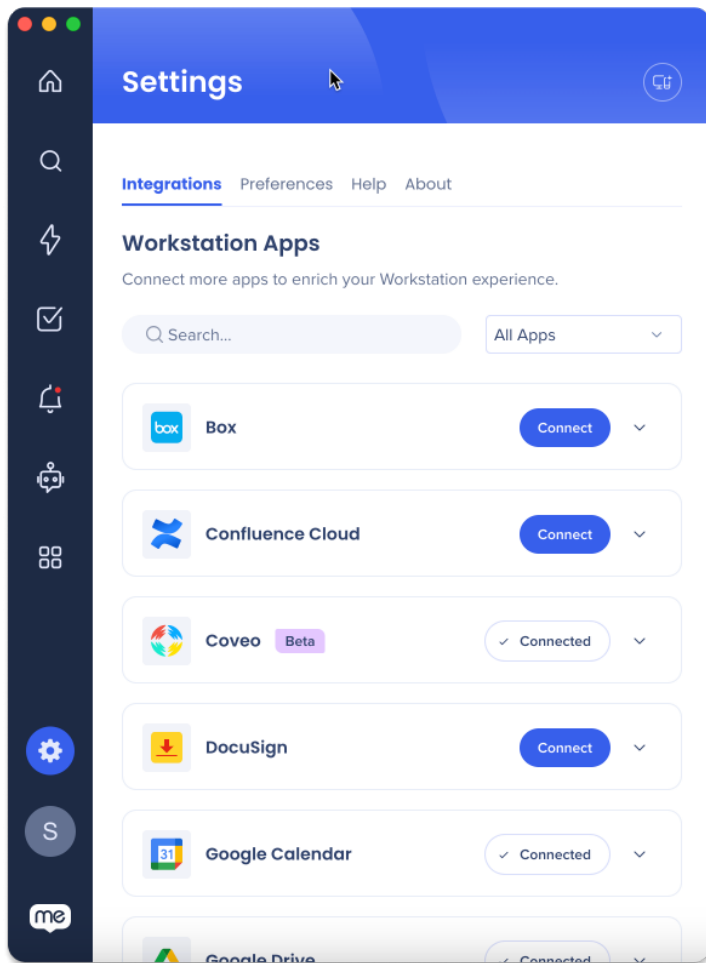
## Settings

The Settings page is where you can personalize your Workstation, view technical information, or find helpful guides on how to use Workstation.









## Integrations

The integrations tab is where you connect your work applications to Workstation. This integrates the app's information so that you can search for its content or add a widget to the homepage.

To integrate an app to your Workstation:

1. Go to **Settings -> Integrations**
2. Find the app you want to integrate
3. Click **Connect** next to the app
4. Follow the sign-in process for that app
5. Done! If the integration includes a widget, it will appear on your homepage.

Integrations is an enabled feature so it will only be available on your Workstation if your organization enabled them.

[Read about integrations security.](#)

Don't see the app you need?

[Check out the Integrations Search API and connect your own apps.](#)

## Preferences

The preferences tab allows you to personalize your Workstation. You can change the language, date and time formatting, or customize your Bubble's emoji.

You can also connect another Workstation device.

Click on the options below and follow the instructions to change the settings in your Workstation:

Change your Workstation's language

To change the Workstation language:

1. Go to the **Settings** page -> **Preferences** -> **Application language**
2. Select your language from the dropdown
3. Click **Yes, Apply** on the confirmation pop-up

Change the clock display format

You can change the homepage clock to display between 24-hour (13:00) or 12-hour (1:00 p.m.) format:

1. Go to the **Settings** page -> **Preferences** -> **Clock display**
2. To enable **24-hour format**, turn the toggle on
3. To enable **12-hour format**, turn the toggle off

Change the date display format

To change the homepage date display:

1. Go to the **Settings** page -> **Preferences** -> **Date display**
2. Select the format you want from the dropdown
  - Month DD, YYYY (November 12, 2023)
  - DD/MM/YYYY (12/11/2023)
  - MM/DD/YYYY (11/12/2023)

Enable quick access hotkey

You can open Workstation by pressing on your keyboard - Cmd+Shift+E (Mac) or CTRL+Shift+E (Windows).

1. Go to the **Settings** page -> **Preferences** -> **Enable quick access hotkey**
2. To **enable the hotkey**, turn the toggle on
3. To **disable the hotkey**, turn the toggle off

Open application in background

To open Workstation in the background, toggle the **Open application**

**in the background** setting. This will launch the app during operating system start-up without appearing on the screen, remaining minimized in the task bar.

Resize the text

You can make the text larger on Workstation, we recommend keeping it at 100%.

1. Go to the **Settings** page -> **Preferences** -> **Display size**
2. Select the display size you want (100%, 150%, 200%)
3. Click **Yes, Apply** on the confirmation pop-up to confirm the change

Connect another device

You can have Workstation on another desktop device.

Connecting Workstation between devices connects your integrations between these devices.

To connect another Workstation:

1. On your desktop Workstation, go to the **Settings** page -> **Preferences** -> **Connect another device**
2. Click **Generate Code**
3. Type the code in the new device
4. **Done**  
Bubble settings  
From **Settings** page -> **Preferences** -> **Bubble settings** you can enable or disable the bubble and change the emoji.

[Read more about the Workstation Bubble.](#)

## Help

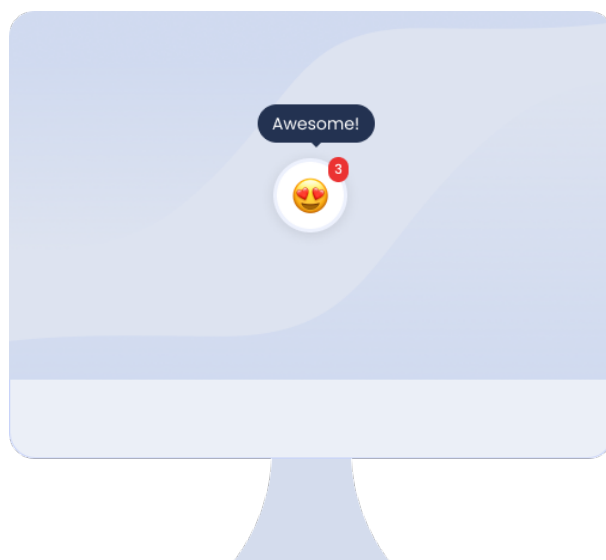
The Help tab provides links to WalkMe's Help Center and quick tips on how to use Workstation, including the Product Tour.

From **Settings** -> **Help**, you can:

- View helpful keyboard shortcuts so you can navigate Workstation without a mouse
- Send feedback about your Workstation experience
- Take a quick product tour of Workstation
- Reload Workstation
  - You can also reload with Cmd+R (Mac) or CTRL+R (Windows)

## About

All the technical information about your Workstation is in the About tab. You can also send us your Workstation feedback by clicking the Send Feedback button and filling out the short survey about your experience.



## Connect Another Device

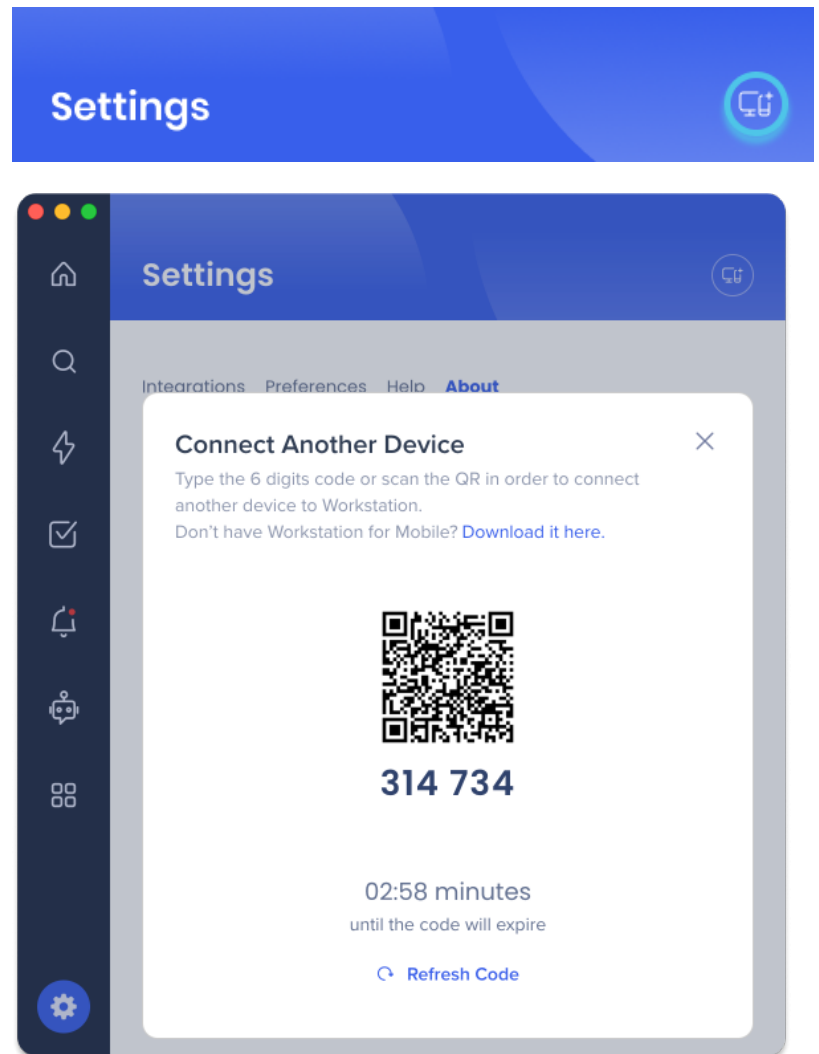
Connect to multiple devices to enjoy a continuous Workstation experience. Download the [Workstation for mobile app](#) and have access to your most important resources on-the-go.

### To connect another device from the Workstation Mobile App:

1. On the login page of Mobile Workstation, click **Connect Another Device**
2. On your connected device, go to **Settings > Preferences**
3. Select **Connect Another Device**
4. Type the 6 digit verification code
  1. Alternatively, click **Scan QR Code** on Mobile and scan the QR code from the connected device

To access the 6 digit verification code / QR code, click the **connect another device icon** in the top right of the

## Settings page.



**That's it!** Enjoy your Workstation experience.