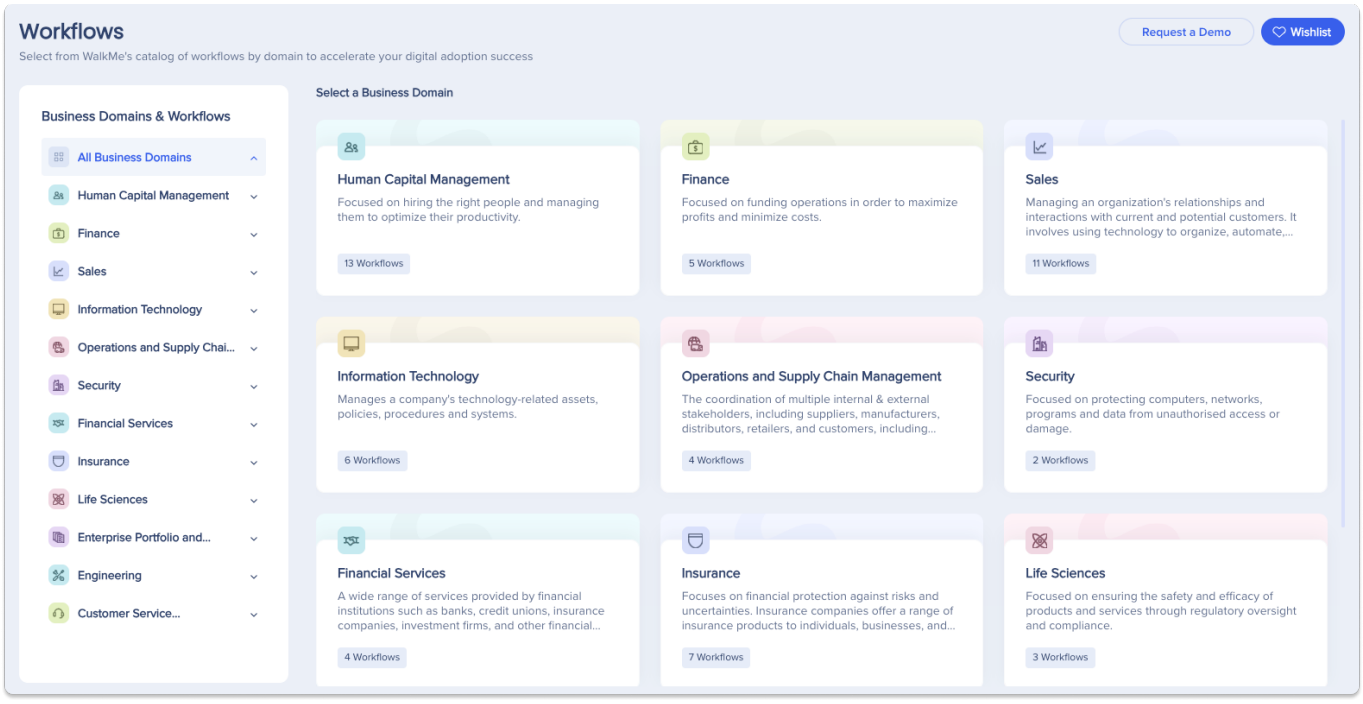
Workflows

Brief Overview

Workflows is a comprehensive tool that helps organizations optimize their operations. It includes a console application with custom and configurable **pre-defined solutions based on industry best practices**. These solutions, called Tasks (Accelerators), are designed to help businesses get started faster and identify friction points in critical workflows.

The console application provides a user-friendly interface for businesses to configure, manage, and track their workflows. Businesses can easily **view data** and **identify areas for improvement** that targets specific business domains, making it a valuable tool for businesses looking to optimize their operations.



WalkMe's first external console application

WalkMe’s first external Console application allows users to explore the Workflows framework without requiring WalkMe credentials, down to the Workflows level of the taxonomy.

Access

	Console Link	Available Pages and Features
Without WalkMe credentials	• US Data Center: https://console.walkme.com/explore-userworkflows/index.html • EU Data Center: https://eu-console.walkme.com/explore-userworkflows/index.html	• Business Domains • Workflows • Wishlist
With WalkMe credentials	• US Data Center: https://console.walkme.com/userworkflows • EU Data Center: https://eu-console.walkme.com/userworkflows	• Business Domains • Workflows • Tasks (Accelerators) • Wishlist • Workflow Progress Indicator

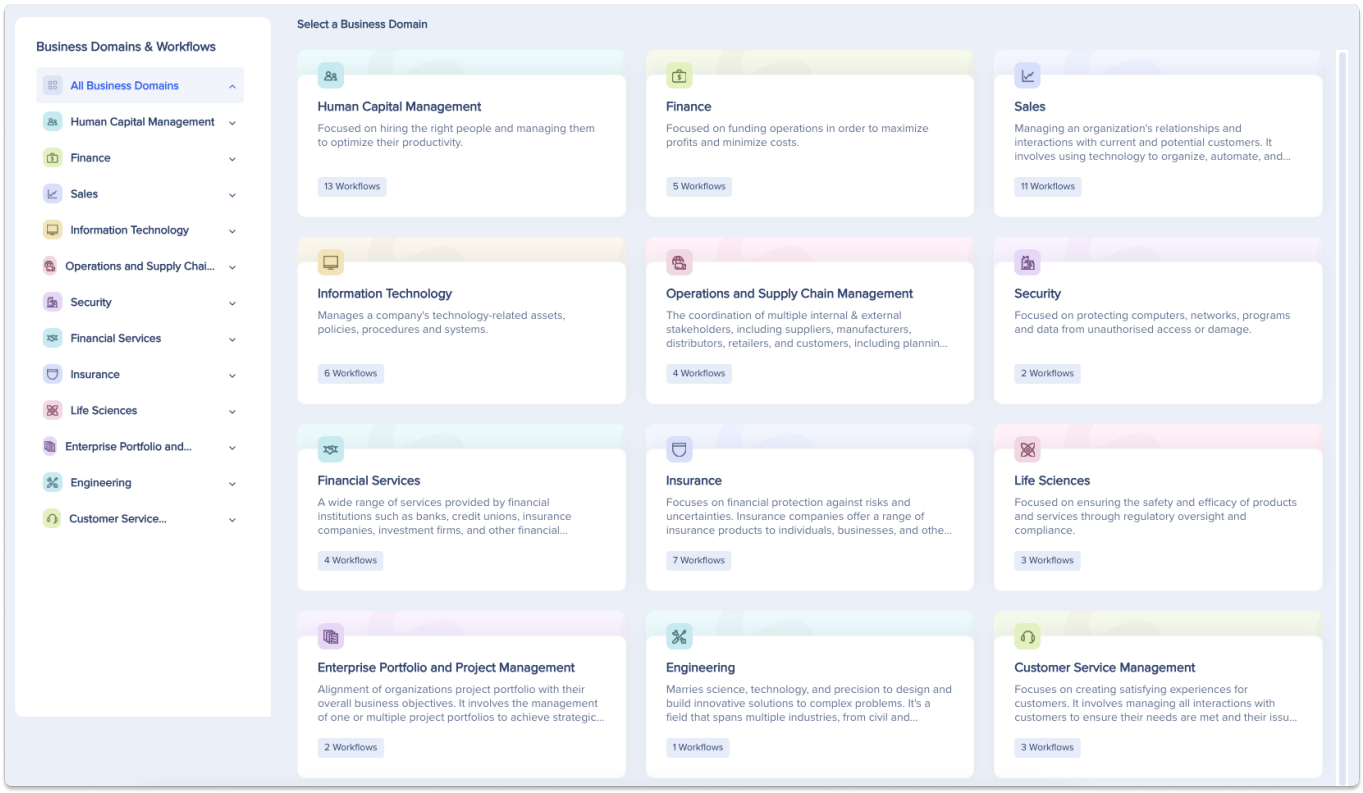
Framework

The Workflows framework is organized into three levels:

1. Business Domains
2. Workflows
3. Tasks

Business Domains

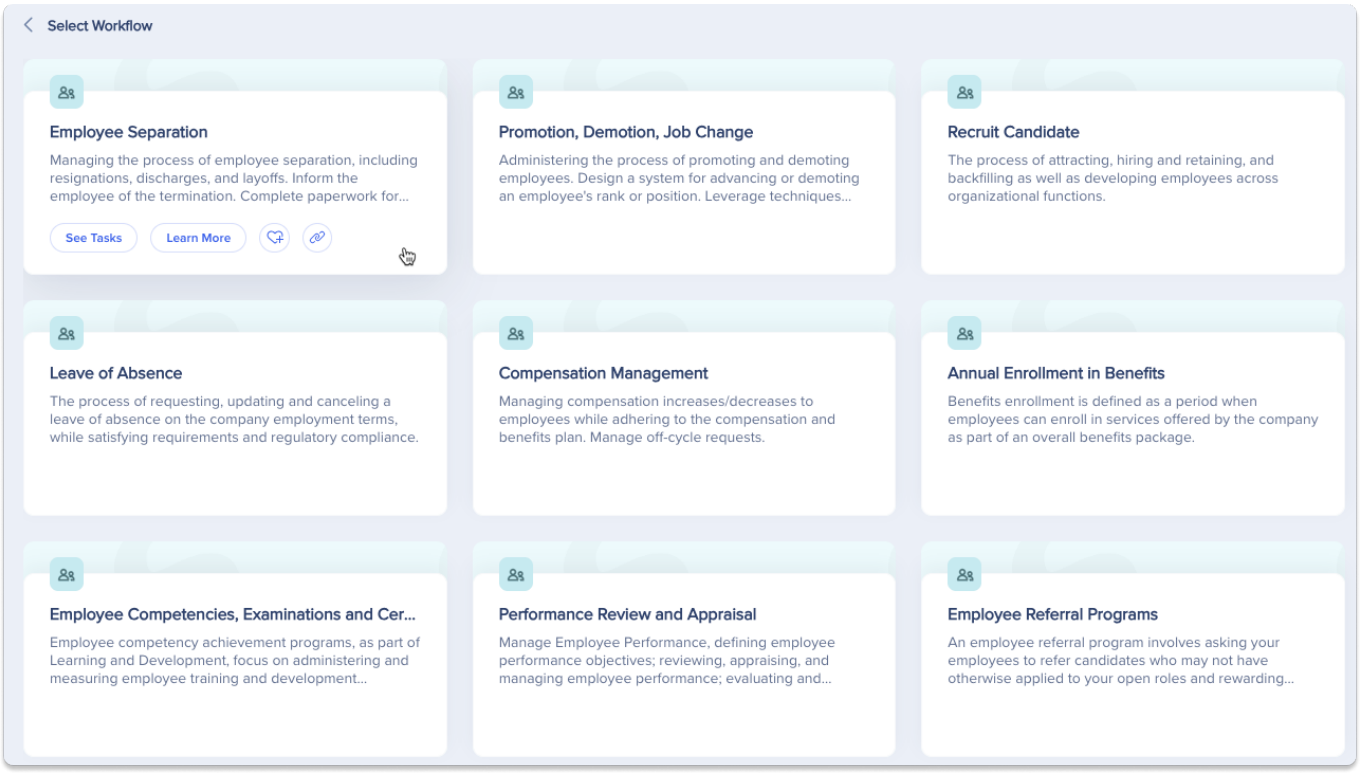
Business Domains are an area of activity within a company, a department that focuses on specific areas of the business. These are the Business Domains we are focusing on the most: HCM (Human Capital Management), Sales, Finance, IT, Risk and Compliance, and Customer Service and Support.



The business domain cards provide a brief description of each domain and show the number of available workflows within it. To access the workflows within a business domain, simply select the domain using the side bar menu or by clicking on the corresponding business domain card.

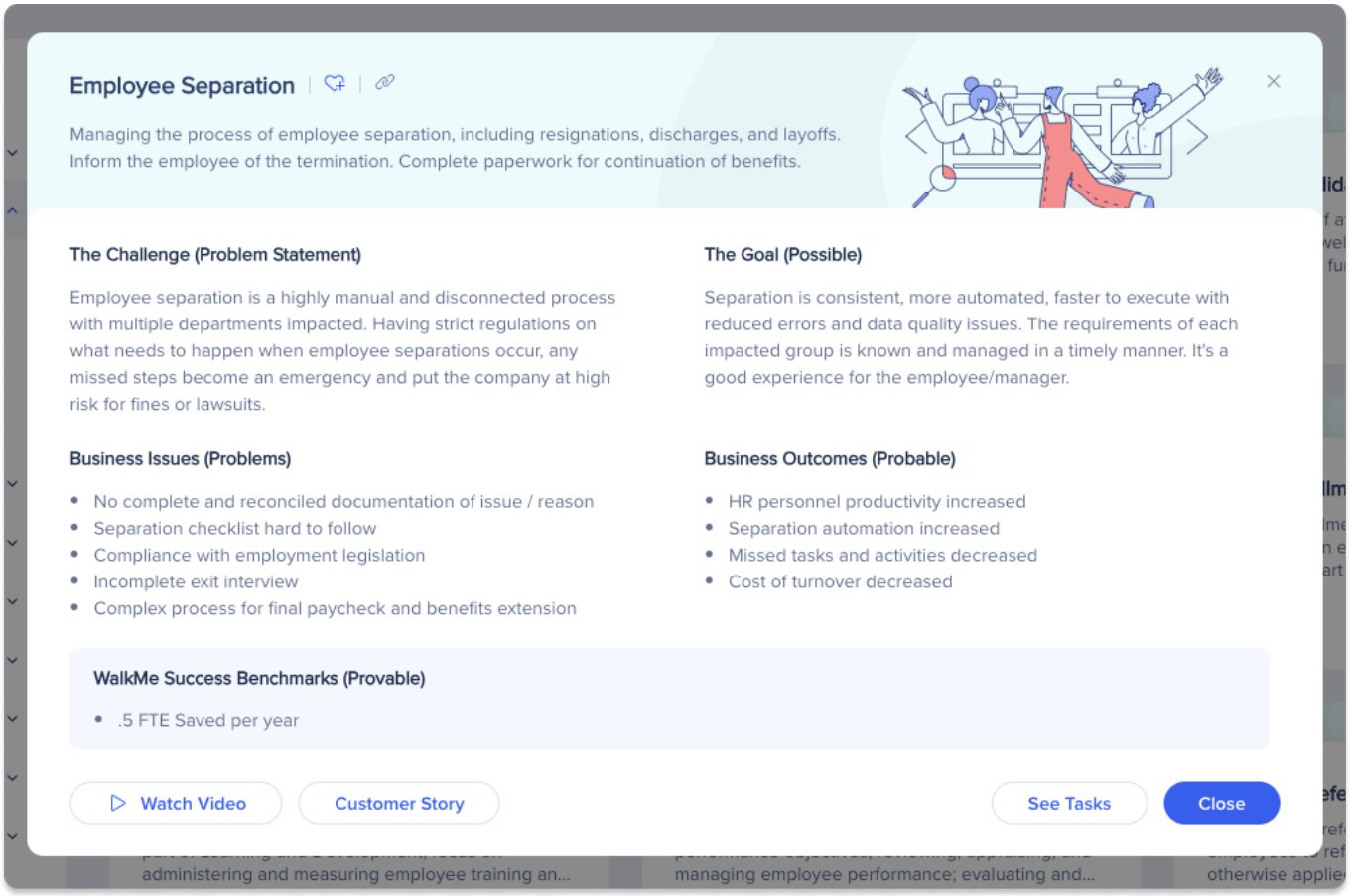
Workflows

Workflows are highly detailed use cases or processes within a business domain. They are made up of tasks that are all individual steps in the overall workflow process.



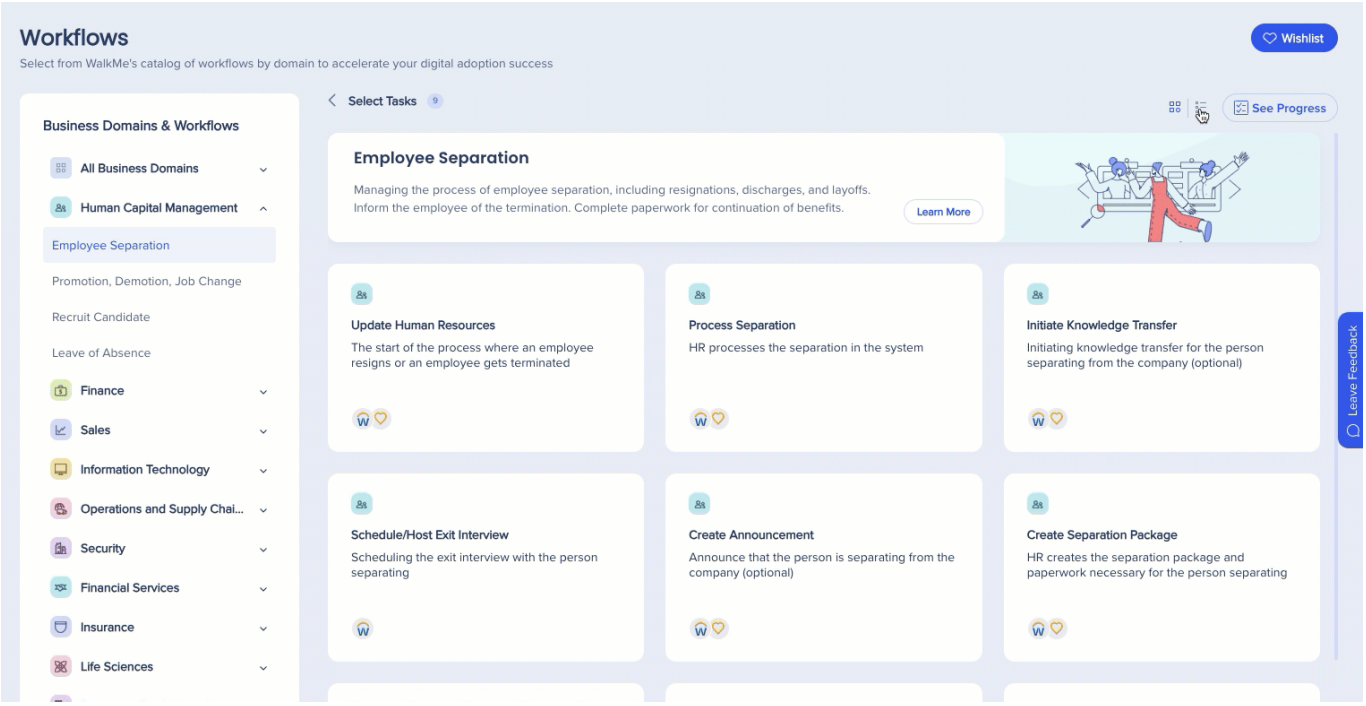
When hovering over a Workflow card, you'll see several action buttons:

- **See Tasks:** Takes you to a list of the tasks involved in the workflow
- **Wishlist (heart icon):** Allows you to add the workflow to your wishlist
- **Copy:** Copies a link to the workflow for easy sharing
- **Learn More**: Opens a popup with additional information on the workflow's challenges, business issues, goals, and outcomes. Some Learn More popups also include:
    - **Watch Video:** Clicking this button will open a demo video of the entire process
    - **Customer Story:** Clicking this button will open a new browser tab, redirecting the user to customer stories on the WalkMe website

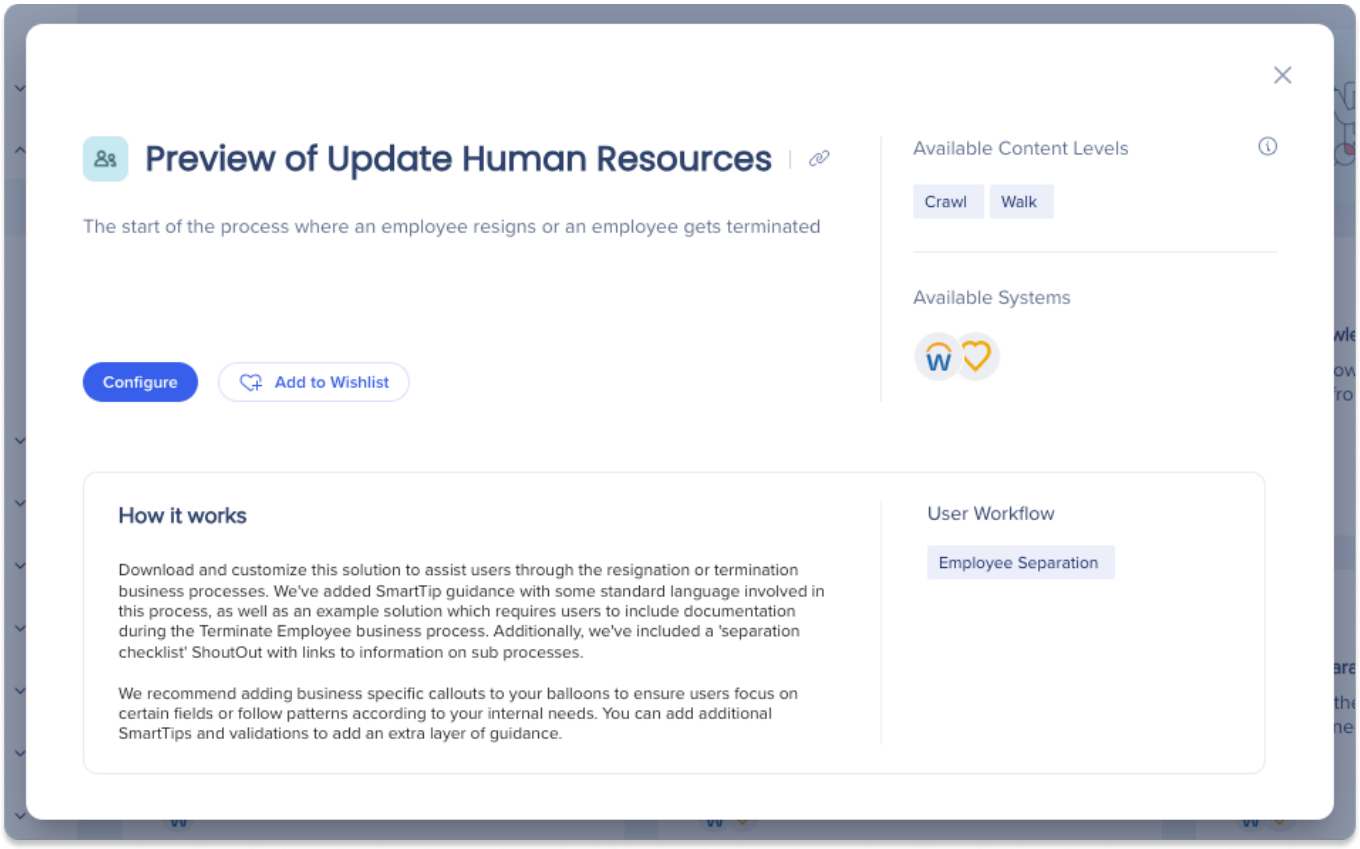


Tasks (Accelerators)

View all of the tasks that make up the workflow.



- Toggle between the card view and table view by clicking the layout toggles
- Hover over a task card or table row and click the **Preview** button to see more information including:
    - Task's title and short description
    - Available Content Levels
    - Available previews videos and images
    - Available systems
    - "How it works" section
    - The parent workflow
- Click the **Add to Wishlist/heart** button to add the task accelerator to the Wishlist panel



Additional Features

Wishlist

The Wishlist feature enables users to save workflows they are interested in implementing with WalkMe. Users can also export the Wishlist as a CSV or PDF.

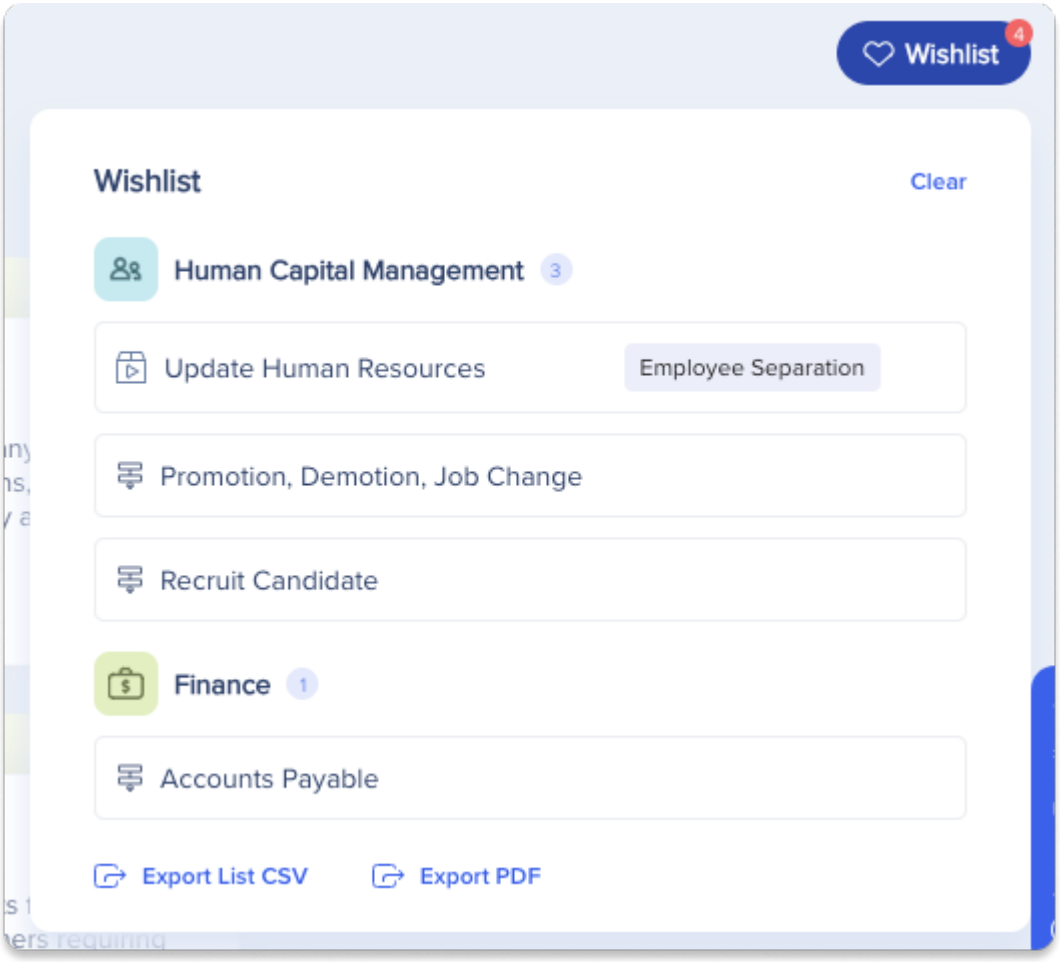
The Wishlist view includes:

- The parent business domain
- Row items for:
  - Tasks (Accelerators)
  - Placeholder tasks for workflows

How to use:

- **Open Wishlist:** Click the **Wishlist button** to open the Wishlist panel
- **Export Wishlist:** Export the Wishlist as CSV or PDF using the Export buttons at the bottom of the list
- **Removing individual item:** Remove individual items from the Wishlist by hovering over an item row and clicking the trash icon

- **Clear wishlist:** Remove all items from the Wishlist by clicking the **Clear** button
- **Preview wishlist:** Preview your Wishlist items by clicking the **Preview** button

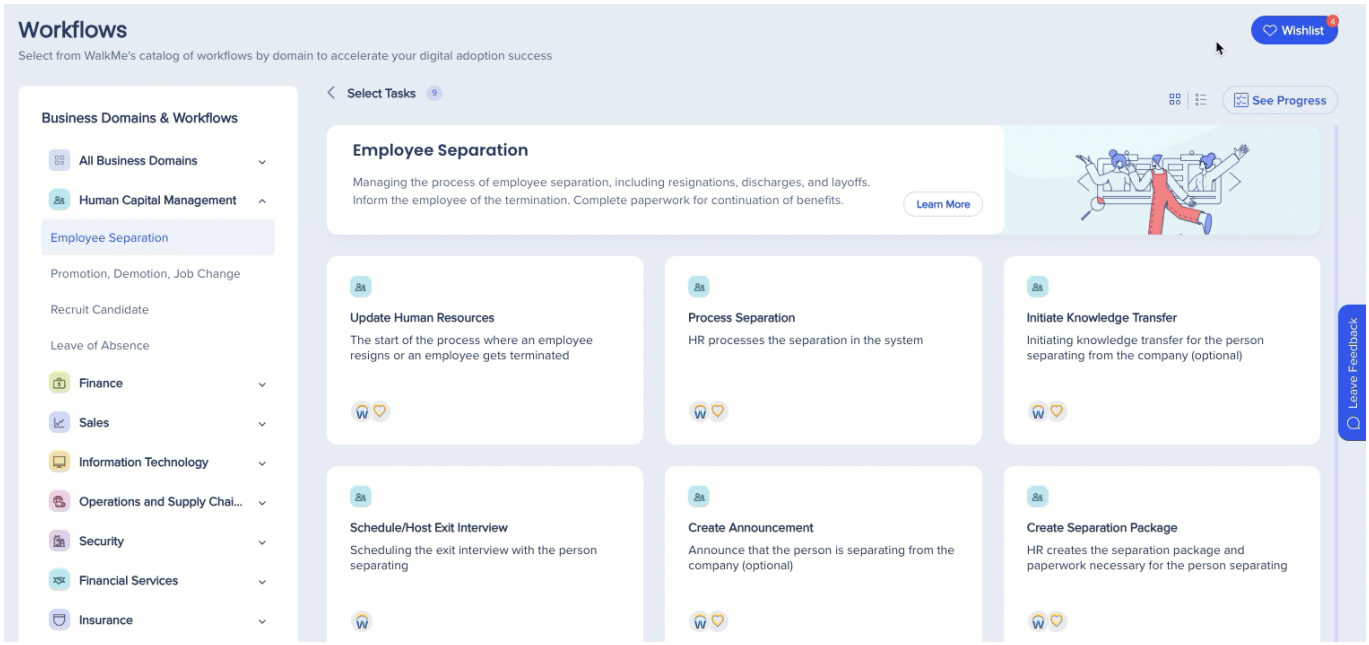


Workflow Progress Indicator

The Workflow Process Indicator allows users to view the Workflow's Tasks (Accelerators) as a linear process listing each Accelerator within the Workflow from start, middle, to end. The Workflow Process Indicator also allows users to see which Tasks (Accelerators) they've downloaded to their Editor Systems.

To view the Workflow Progress Indicator:

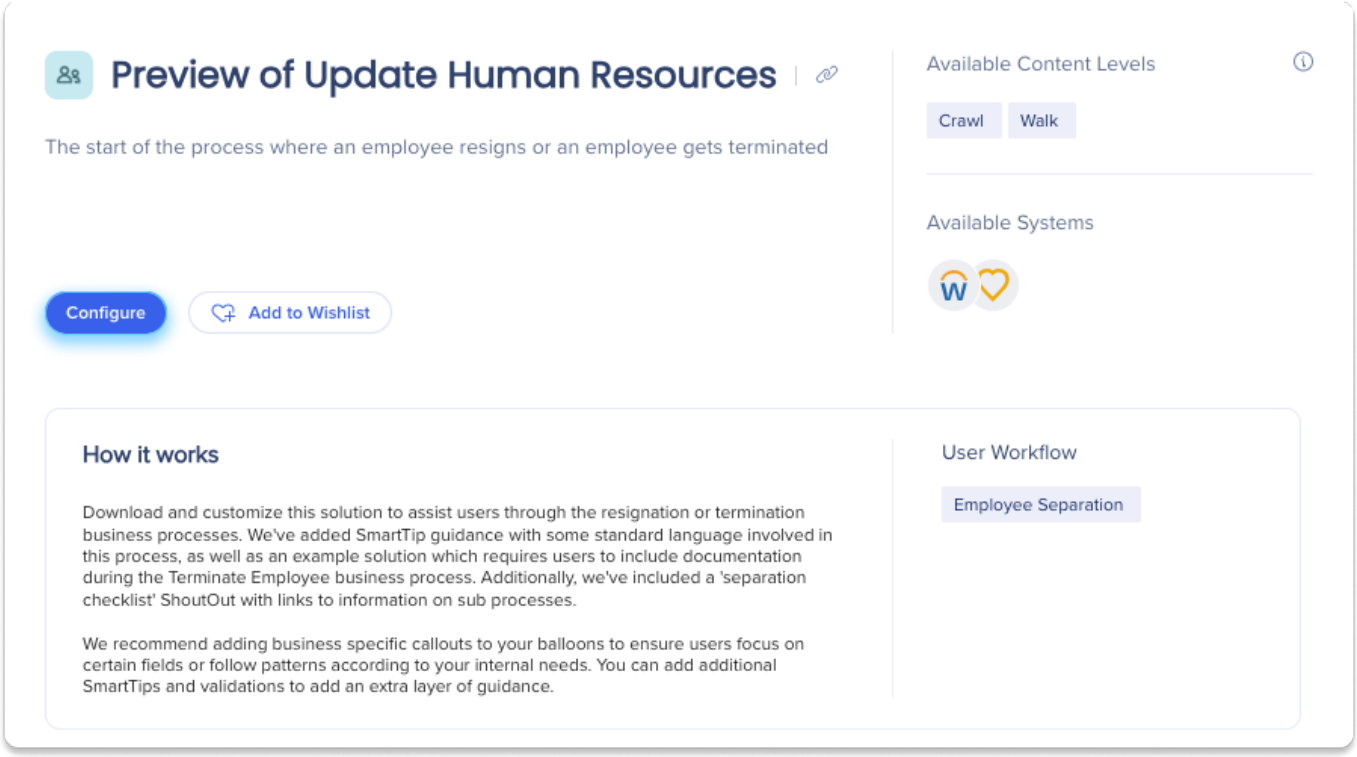
1. From the Workflow app's homepage, select a Business Domain such as 'Human capital Management'
2. Within the Business Domain, select a Workflow such as 'Employee Separation'
3. Within the Tasks page, click the **See Progress** call-to-action to open the Workflow Progress component



Configure & Download

Select a task to configure

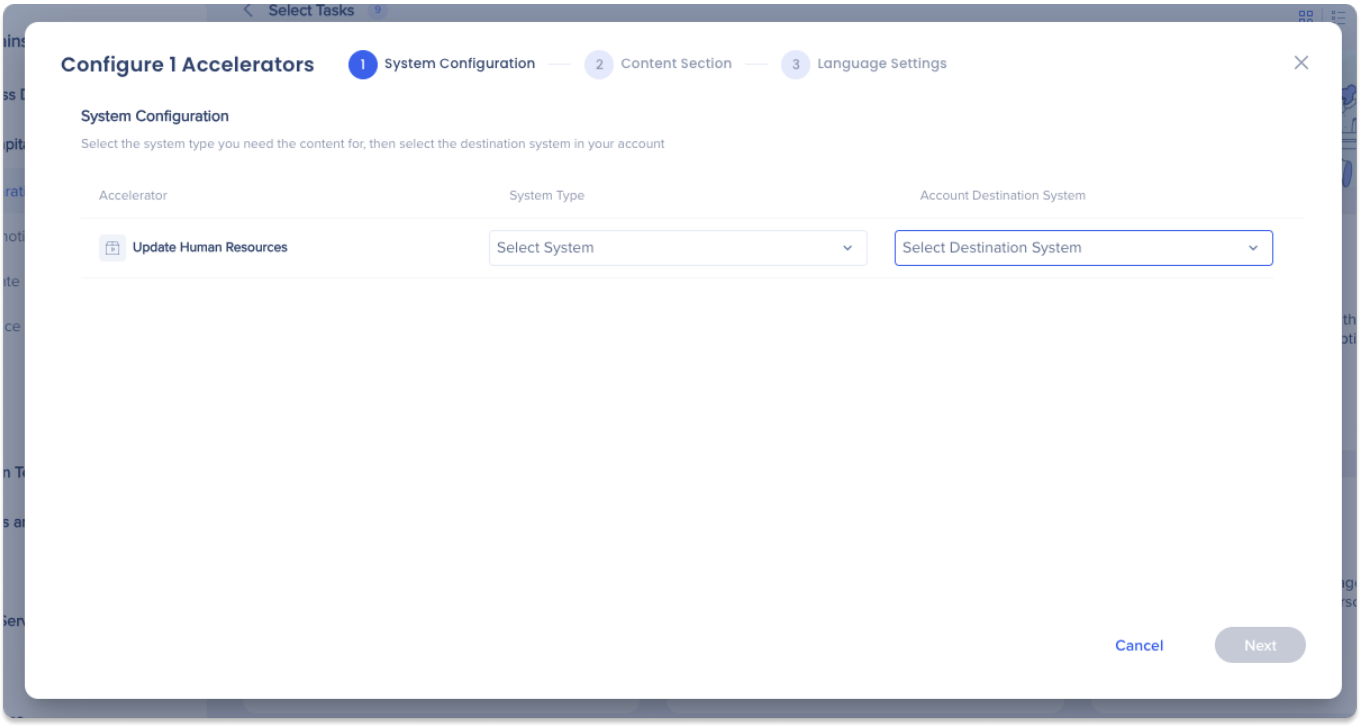
After selecting a task you'd like to use, click the **Configure button** to open the configuration popup.



Step 1: System Configuration

1. Select **System Type** and **Account Destination System** from the dropdowns
    - **System Type:** The System Type allows users to select the available Accelerator System Type to download
    - **Account Destination System:** The Account Destination System dropdown allows users to select a Editor System within their account where the Accelerator content will be downloaded

2. Click **Next**

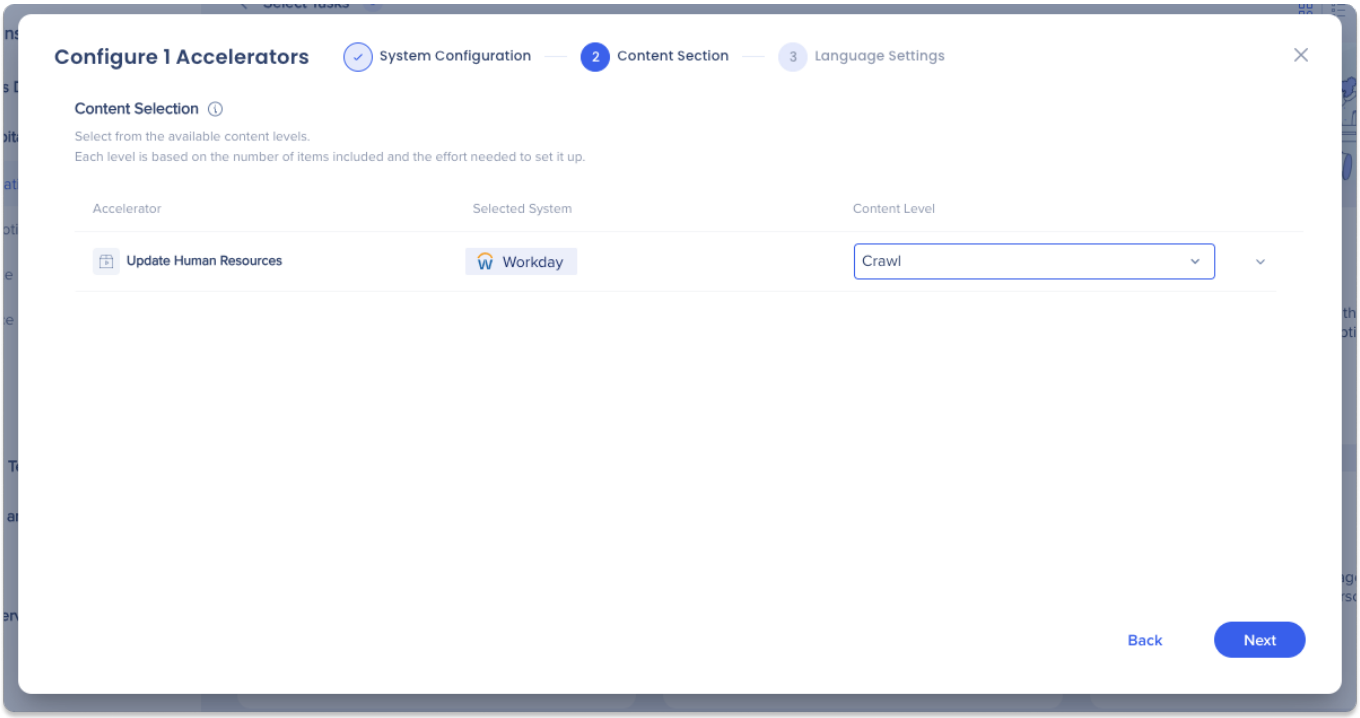


Step 2: Content Selection

The Content Selection page allows users to choose which level of content they wish to download for their implementation. WalkMe Workflows offer flexibility in deploying content at any level and pace, with a recommended starting point at the basic level (crawl) for ease and speed.

1. Select a **Content Level** from the dropdown
    - **Crawl:** Little effort required to publish this content. Use this level if you need a quick solution now
    - **Walk:** Moderate effort required to publish this content. Use this level if time is less of an issue and you want to gain more value
    - **Run:** Considerable effort required to publish this content. Use this level if time isn't an issue and you want to gain the most value

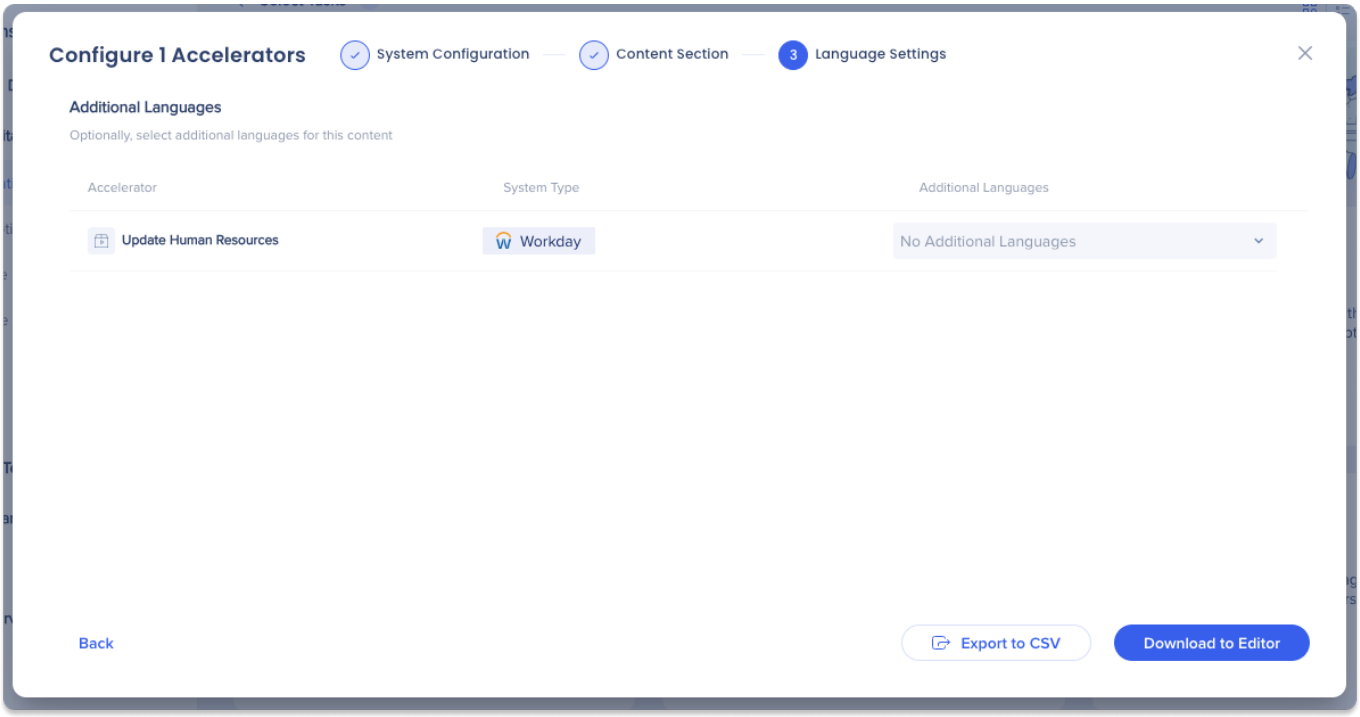
2. Click **Next**



Step 3: Language Settings

The Language Settings page allows users to select additional languages available for a specific Task Accelerator.

1. Select any additional languages from the **Additional Languages** dropdown if available
    - Additional languages downloaded within a Task Accelerator will be located and pre-configured within the Text and Multi-Language application of https://admin.walkme.com/
2. Click **Download to Editor**
    - You can also Export the Task Accelerator to CSV by clicking **Export to CSV**



Tip Tuesday Video

Limitations

- IE, Safari, and Firefox browsers are not supported currently
- The builder extension must be deployable to play preview and play content after downloading