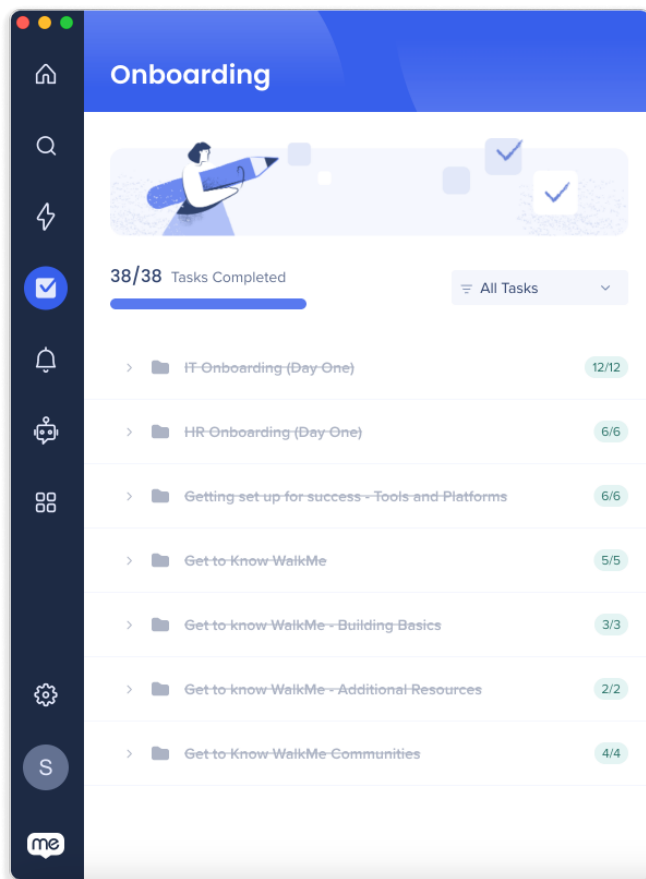


Workstation Tasks: Onboarding

Brief Overview

Workstation Tasks can be used to onboard new employees with personalized checklists and custom resources, fast-track time-to-value and reduce traditional training costs.

Workstation Tasks are added to the Workstation App and consist of Smart Walk-Thrus, and video and articles Resources. This checklist enables users to see their progress as they move through the tasks, improving the user experience, and pushing them to complete more tasks and engage with WalkMe.



Use Cases

Accelerate Training

Give users a clear and straightforward path to complete training. For example, create a task list with all tasks necessary for a new employee to get started such as creating a profile, reading about

company policies, signing up for HR benefits, and setting up an expense account.

Improve Conversion

End customer confusion and make your product attractive and simple. For example, create a checklist that shows off your product's features and drives customers to action.

Promote Product Adoption

Enhance the customer experience and increase loyalty by boosting engagement with your site. For example, create a checklist that takes the user through all the necessary processes to get started.

How It Works

The checklist in the Workstation App is made using Onboarding Tasks that you can create in the WalkMe Editor. These tasks are associated with Smart Walk-Thrus and Resources you have already created.

Once the Onboarding Tasks are published in the Editor, they will appear in the Console in the Workstation Content Manager. There you will be able to compile a list of tasks to be published to the Workstation App.

In the Workstation App, the user can click a task in the checklist and WalkMe will launch the associated Walk-Thru or Resource. As each task is completed, the user's progress will be updated in the progress bar.

Create Onboarding Tasks in the Editor

Before you start creating a Workstation Task list, you'll need to create Onboarding Tasks in the WalkMe Editor. To learn how to create Onboarding Tasks in the WalkMe Editor, read this article:

[**Onboarding Tasks: Getting Started Guide**](#)

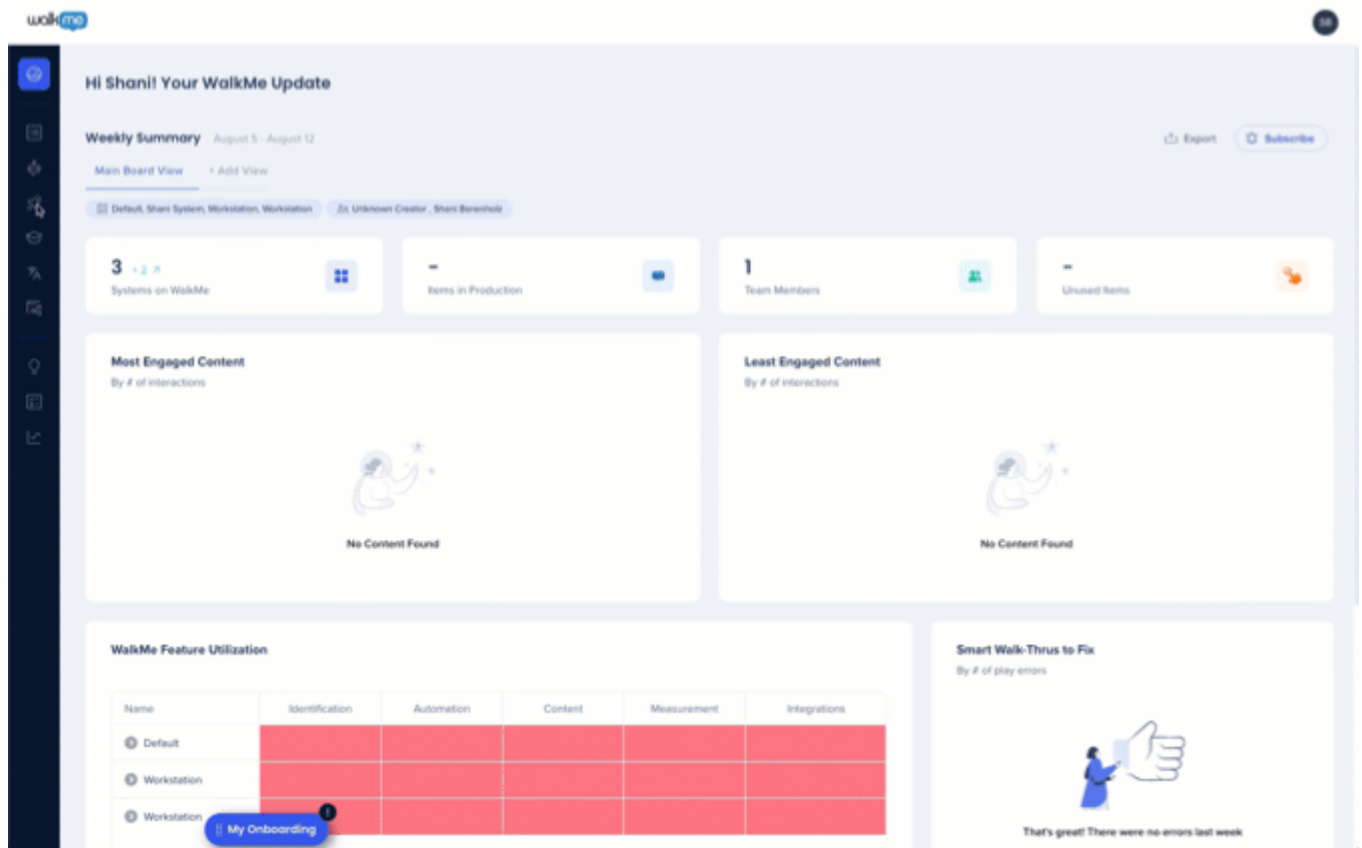
Note

You will not be adding Onboarding Tasks to the WalkMe Menu. Skip this step in the article. Instead, you will be adding Onboarding Tasks to the Workstation Content Manager.

Building Workstation Tasks

Step 1: Navigate to the Workstation Content Manager

Navigate to **WalkMe Console > Workstation > Content**



Step 2: Add items to the Tasks tab

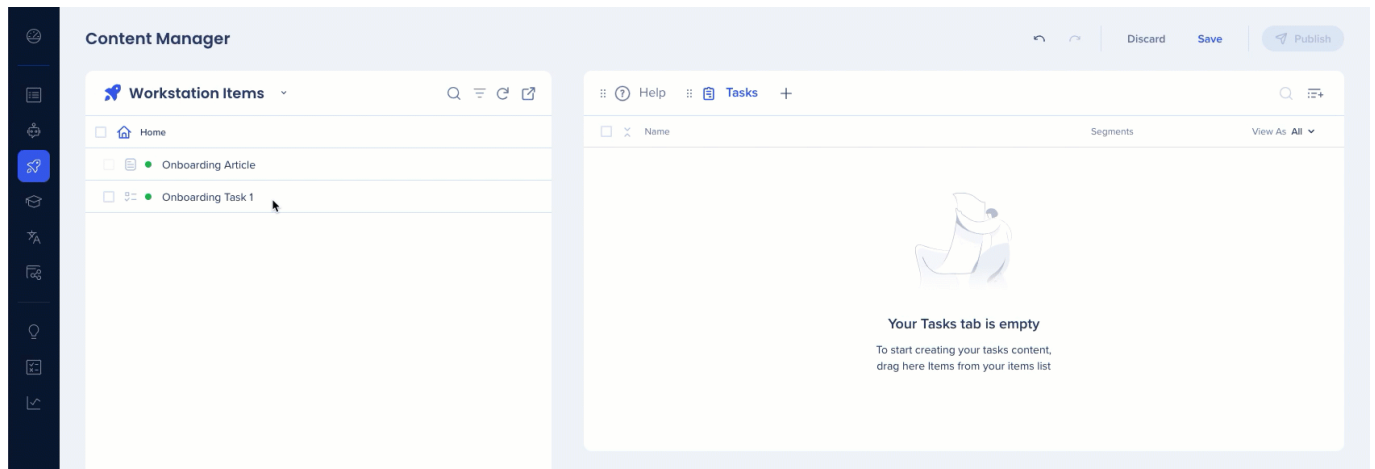
All of the WalkMe content you have created is in the left Items List. The Task tab on the right is where you will place the Onboarding Tasks created in the Editor.

Note

- Only one Tasks list is supported
- Onboarding Tasks cannot be added to the Help tab
- You can rename the Tasks tab by clicking and typing a new name

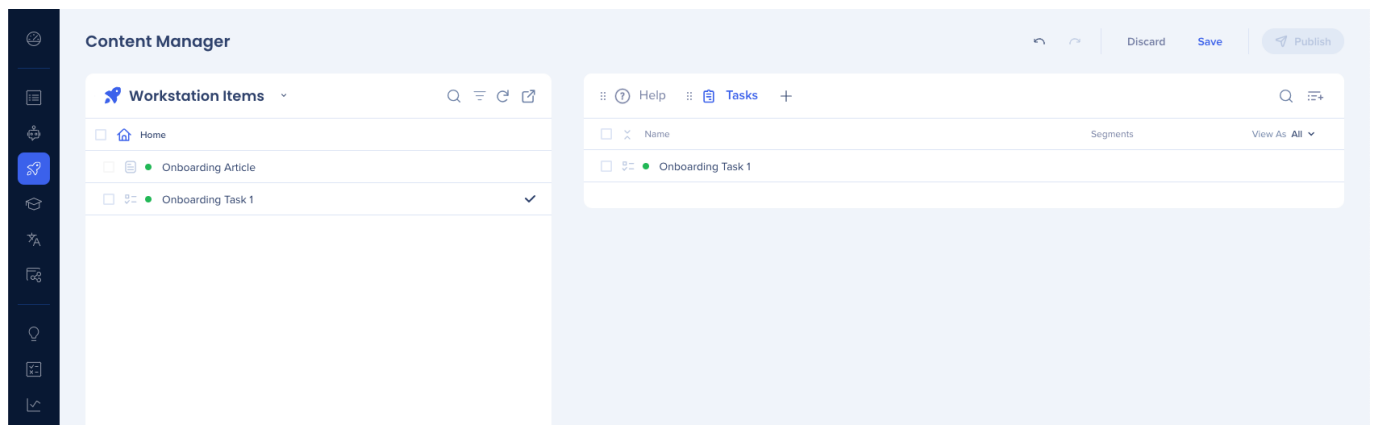
To add items to the Task tab:

1. Click the **Task tab** in the Content Manager
2. Drag desired items from the **Items List** to the **Task tab**



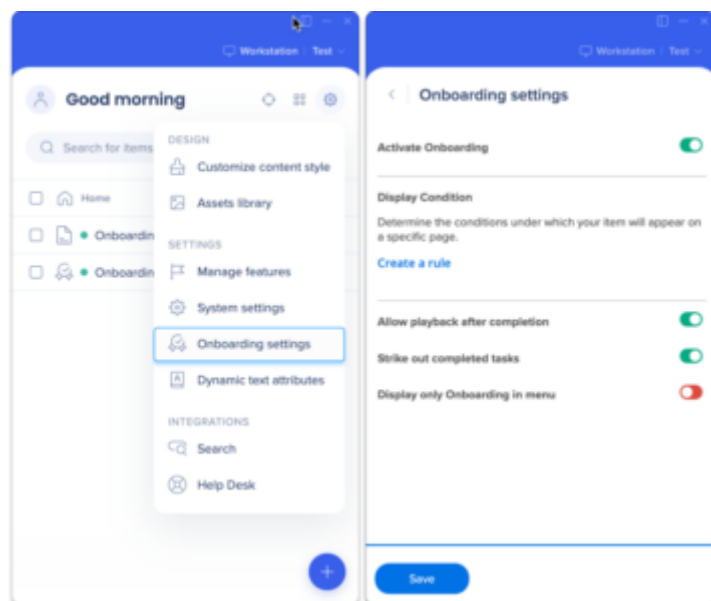
Step 3: How to save and publish your Tasks

1. When you have finished adding content to the Tasks tab, click **Save**
2. When you are ready to publish, click **Publish**



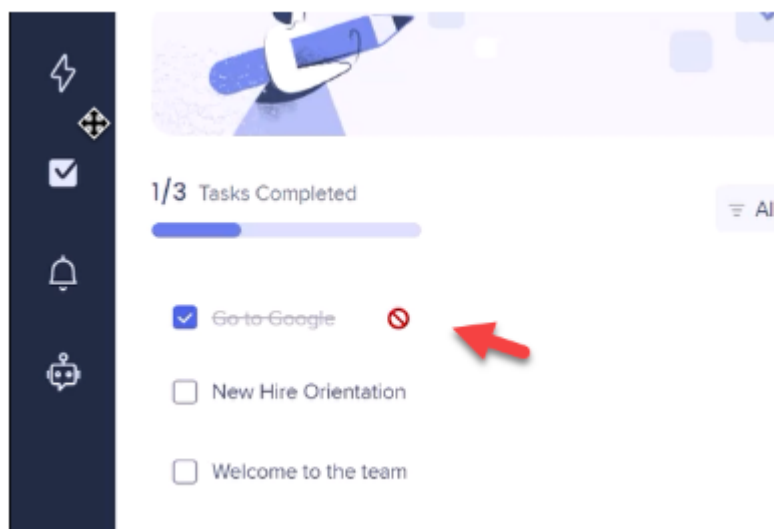
Onboarding Settings

Onboarding Settings are located in the WalkMe Editor and affect all tasks created for the Workstation App. Here you can turn the Onboarding task list on or off, add Display Conditions, and have access to different customizations.



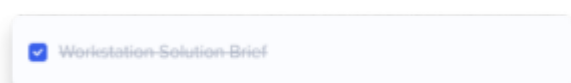
Allow playback after completion

Click this toggle if you want users to be able to open a task again after completion. If this toggle is disabled, a block icon will appear while hovering over the completed task.



Strike out completed tasks

Click this toggle if you want a line to strike through a task that has been completed.



Display only Onboarding in menu

Click this toggle if you only want the Tasks tab to appear in the Workstation Menu. If enabled, the Resources tab will not appear in the Workstation Menu.

Permalinks

It's possible to start the onboarding flow using a permalink. This will trigger the onboarding wizard, followed by the product tour. To do so, use the following permalink:

walkme-workstation://aa2c91b1ec444c76a313a68f69478c55/page?p=search&q=/integrations-wizard

Note

You will first need to convert the permalink to a Tiny URL in order for it to work.