

Installing the Microsoft Dynamics Finance & Operations package

Brief Overview

The WalkMe for Dynamics FinOps (ERP) Package injects the WalkMe snippet within a Dynamics ERP application. It also provides some limited segmentation.

Installing the Package

Press here to reveal

Please note:

- These steps must be performed by a Dynamics System Administrator
- The package must be installed in every Dynamics environment you need WalkMe in
- You do not need to install the package if you are planning on using the WalkMe extension
- Make sure you send your customer their WalkMe system GUID, as it is required during package configuration

Step	Description
1. Download the latest version of the package ZIP file	Download Link

2. Upload the software deployable package to the Asset library in LCS

The screenshot shows the WalkMe LCS interface. A red arrow points to the 'Asset library' icon in the top navigation bar. Below the navigation bar, there is a list of package types: 'Process data package', 'Retail Self-service package', 'Software deployable package' (highlighted), and 'Solution package'. A red banner at the top of the main content area reads 'Reading List'.

Upload Software deployable package file

Name:

Description:

Upload successful

[Add a file](#)

Asset library supports max file size of **14.3 GB**. For files larger than 14.3 GB, please consider other options. For more information click [here](#).

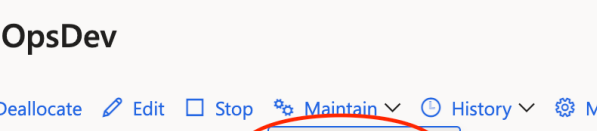
[Confirm](#) [Cancel](#)

Software deployable package files

Name	Valid	Vers...	Scope	Status	Release candid...	Modified date	Package type
WalkMe for F&O v1.3		1	Project	Draft		04/11/2021	
WalkMe for F&O v1.1	✓	1	Project	Draft	✓	18/08/2021	Application deployable package
WalkMe for F&O	✓	1	Project	Draft		23/07/2020	Application deployable package

4. Click Maintain > Apply updates to apply an update

5. Select the WalkMe package to apply - Use the filter at the top to find your package



FinOpsDev

Deallocate Edit Stop **Maintain** History Microsoft A

Manage environment

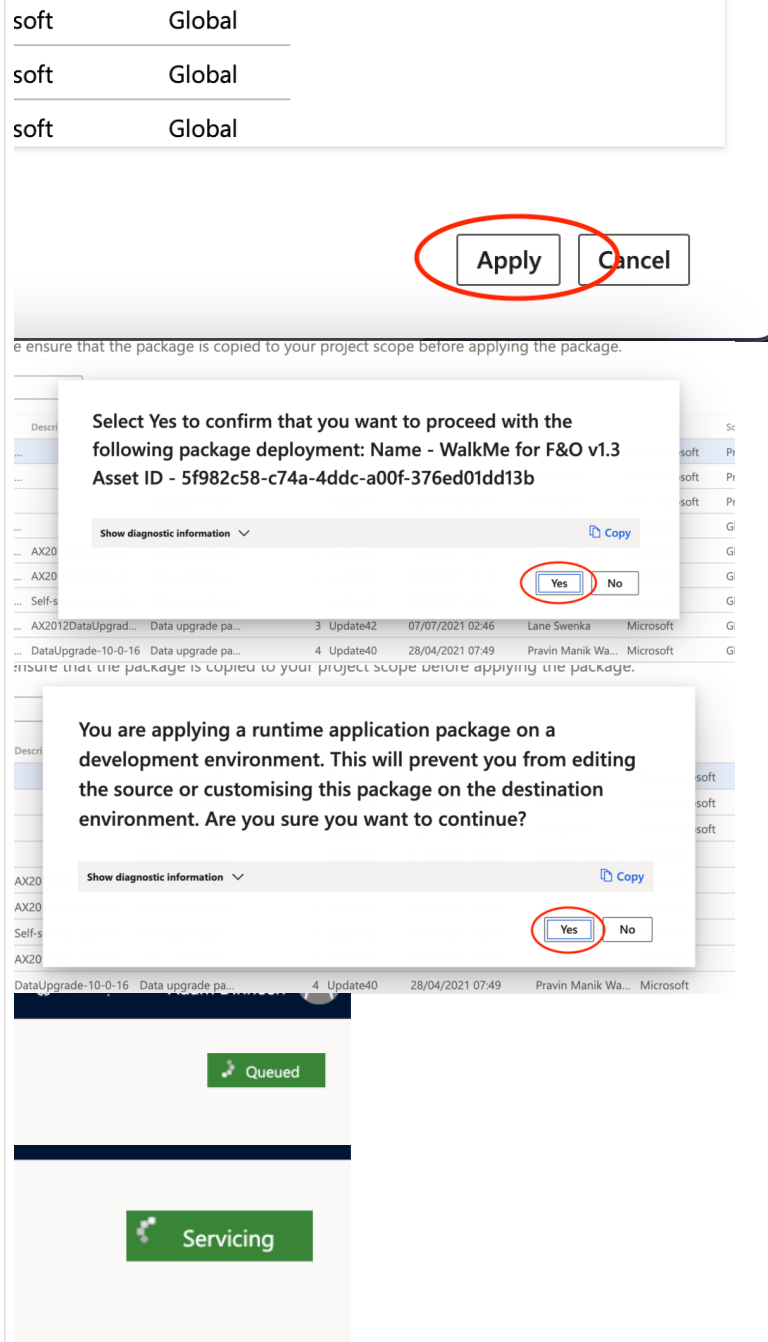
- Apply updates
- Message online users
- Rotate secrets

ENVIRONMENT DETAILS:

Environment Id 00b2a64c-670c-4d38-ae59-d54f32565d7d

6. Click Apply

- Notice that the status in the upper-right corner of the Environment details view changes from Queued to In Progress, and an Environment updates section now shows the progress of the package
- You can refresh the page to check the status



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Apply **Cancel**

Please ensure that the package is copied to your project scope before applying the package.

Select Yes to confirm that you want to proceed with the following package deployment: Name - WalkMe for F&O v1.3
Asset ID - 5f982c58-c74a-4ddc-a00f-376ed01dd13b

Show diagnostic information [Copy](#)

Yes **No**

You are applying a runtime application package on a development environment. This will prevent you from editing the source or customising this package on the destination environment. Are you sure you want to continue?

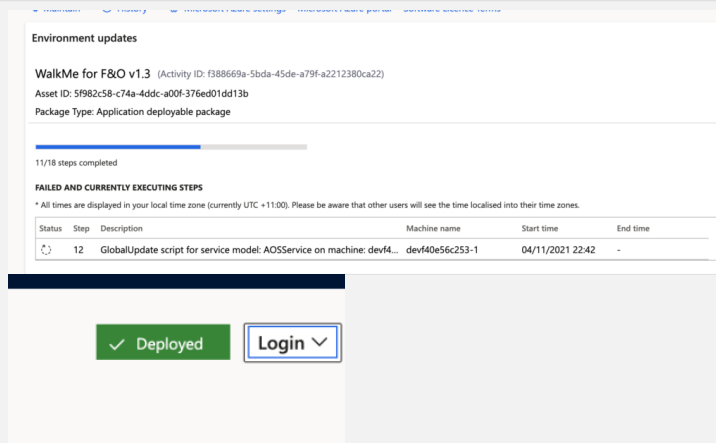
Show diagnostic information [Copy](#)

Yes **No**

Queued

Servicing

7. Continue to refresh the page to see the status updates for the package application request
When the package has been applied, the environment status changes to Deployed, and the servicing status changes to Completed.



Environment updates

WalkMe for F&O v1.3 (Activity ID: f388669a-5bda-45de-a79f-a2212380ca22)
Asset ID: 5f982c58-c74a-4ddc-a00f-376ed01dd13b
Package Type: Application deployable package

11/18 steps completed

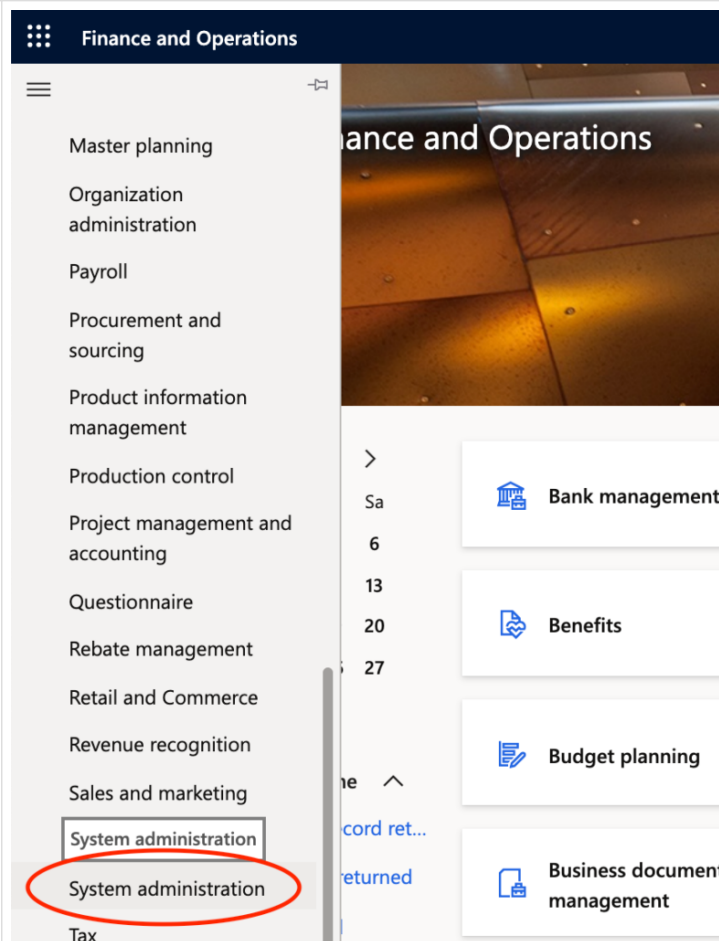
FAILED AND CURRENTLY EXECUTING STEPS

* All times are displayed in your local time zone (currently UTC +11:00). Please be aware that other users will see the time localised into their time zones.

Status	Step	Description	Machine name	Start time	End time
🕒	12	GlobalUpdate script for service model: AOSService on machine: devf4...	devf40e56c253-1	04/11/2021 22:42	-

✓ Deployed Login ▾

8. Access the **System administration** module



Finance and Operations

- Master planning
- Organization administration
- Payroll
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Rebate management
- Retail and Commerce
- Revenue recognition
- Sales and marketing
- System administration
- System administration
- Tax

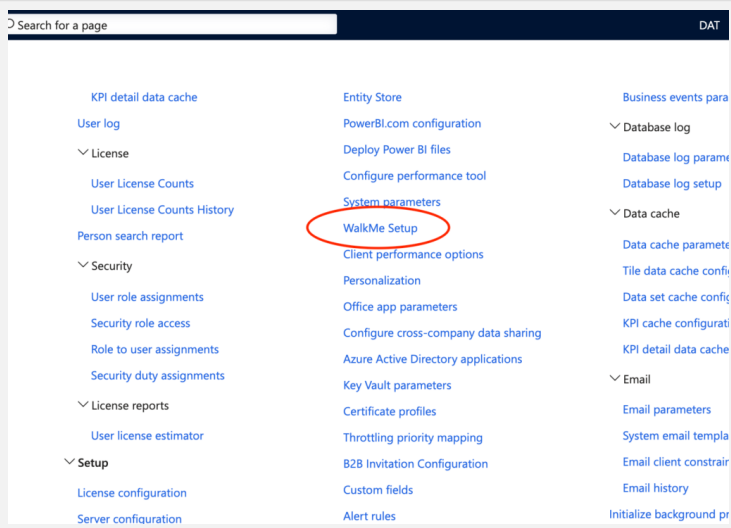
Bank management

Benefits

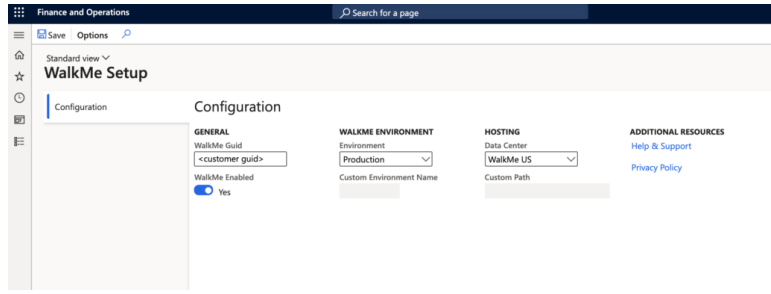
Budget planning

Business document management

9. Under Step, click on **WalkMe Setup**



10. Configure WalkMe and click **Save**
Once saved, all users will get the new configuration on the next page reload (no cache or cookie clearing is required).



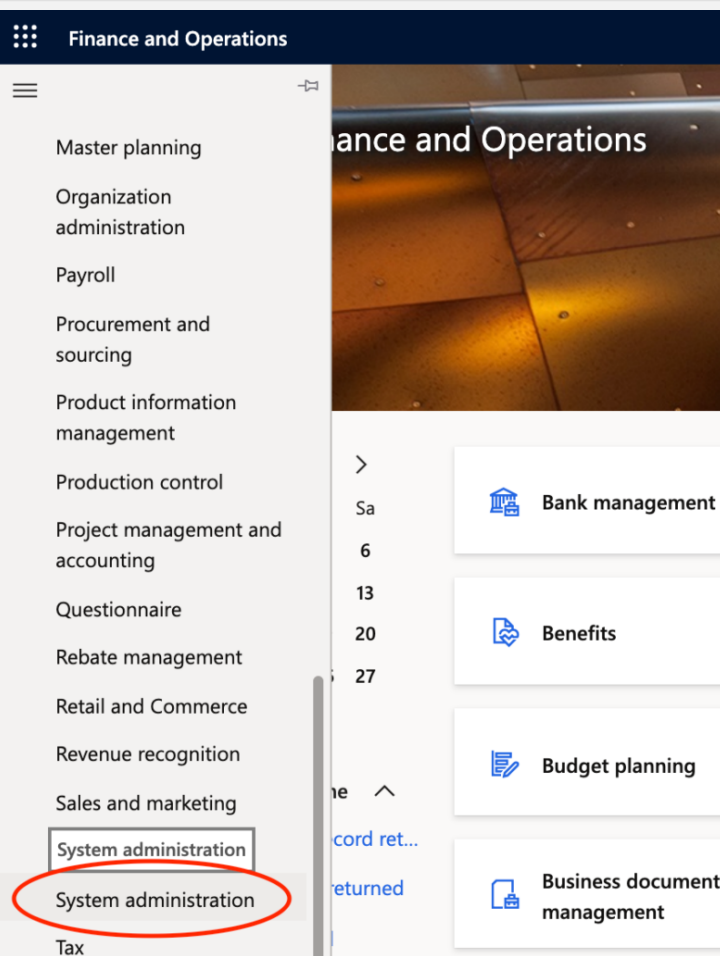
Configuring the Package

Press here to reveal

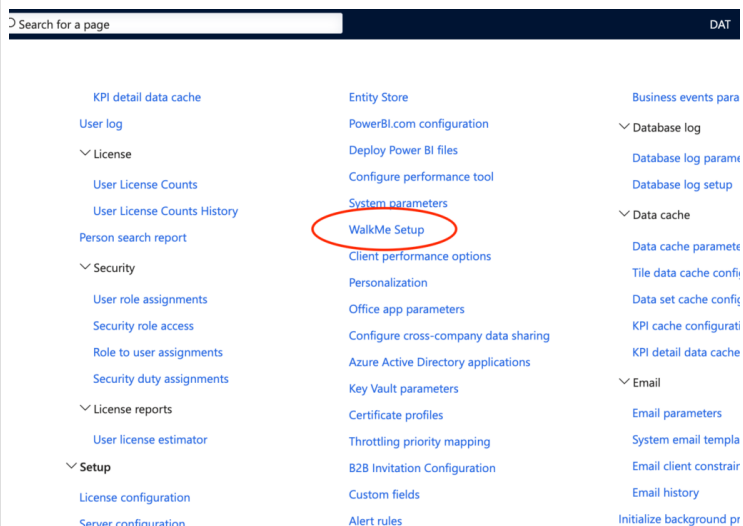
Once deployed successfully, a Dynamics F&O administrator can configure WalkMe. They will see the following:

Step	Description
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1. Access the **System administration** module



2. Under Step, click on **WalkMe Setup**



3. Click **WalkMe for Dynamics 365**

Adjust the configuration as needed:

Settings:

- **WalkMe Guid:** You will have received your Guid from WalkMe in an email. If not, contact your WalkMe CSM or DAC or WalkMe Support to request it.

- **WalkMe Enabled:** Enables or disables WalkMe for all end users

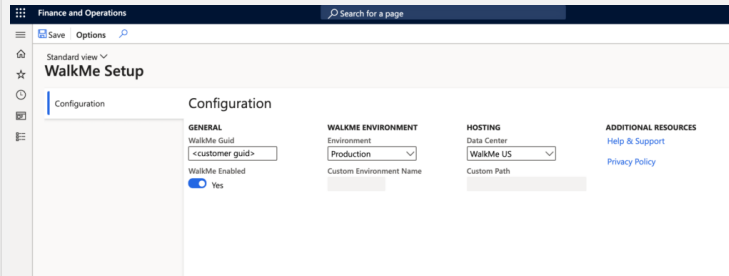
- **Environment:** This should align with your WalkMe Editor environment (choose **Other** for any non-standard / custom environment, then you can enter the environment name)

Additional options:

- **Hosting:** Choose US or EU data center, or self hosted

Other notes:

- For **Other** (custom) environments, you should use the custom environment name (i.e. 'dev', 'uat' etc) and ensure it is case sensitive



The screenshot shows the 'WalkMe Setup' configuration page. The 'Configuration' tab is selected. The settings are as follows:

GENERAL	WALKME ENVIRONMENT	HOSTING	ADDITIONAL RESOURCES
WalkMe Guid: <customer guid> WalkMe Enabled: <input checked="" type="checkbox"/> Yes	Environment: Production Custom Environment Name:	Data Center: WalkMe US Custom Path:	Help & Support Privacy Policy