WalkMe Deployment Overview

Brief Overview

When deploying WalkMe you have the option to place the Player Snippet directly into the code of your website or use the WalkMe Extension. The WalkMe Extension can be downloaded by your end-users or mass-deployed by your IT department.

Digital Adoption Institute

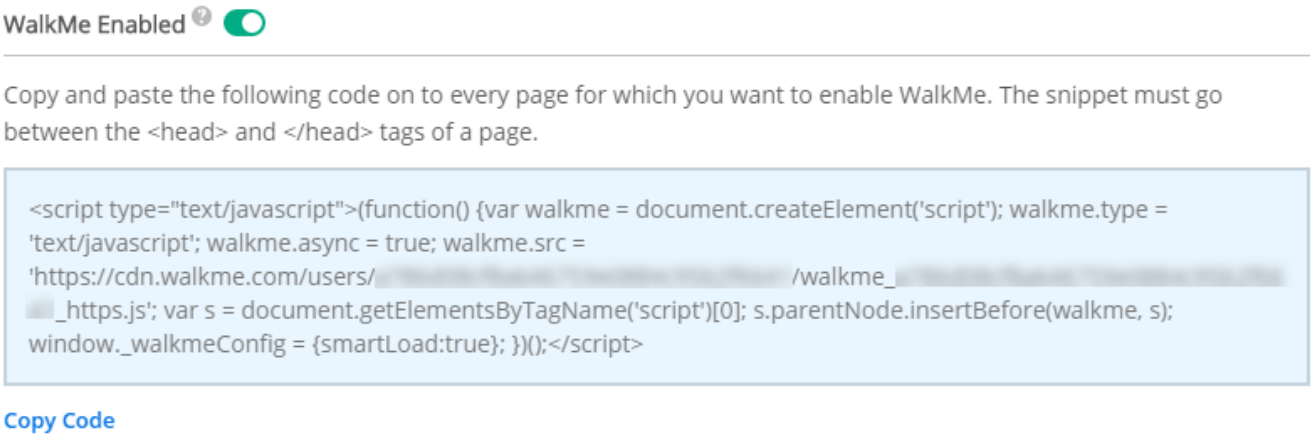
- Take the **Deploy WalkMe to your End Users** course in the **Technical Configuration** curriculum.
- Don't have a DAI account yet? **Sign up here.**

WalkMe Snippet

Adding the Player Snippet to Your Site's HTML

For many customers, installing the Snippet directly into the HTML code of their site is the best option. Installing the Snippet directly into the HTML code allows WalkMe to appear for all users that visit their site. This option is especially popular for external-facing applications since users do not need to download or install anything for WalkMe to appear.

Customers must have access to the code for their website/app to add the Player Snippet directly into their site. The snippet code itself is accessible from the Editor and is unique to each account.



WalkMe SaaS Model (recommended method)

In the WalkMe SaaS Model, WalkMe software is held on Amazon Web Services (AWS). WalkMe's servers are located in Amazon Elastic Compute Cloud (EC2), while the WalkMe content and logic details are stored on the Amazon Relational Database Service (RDS).

Any published content is saved on Amazon Simple Storage Service (S3) and is instantly deployed to Akamai's Content Delivery Network (CDN) for fast download rates for all WalkMe end-users. This architecture requires zero implementation from our customers, who only need to add the WalkMe snippet onto their website's HTML pages or deploy the WalkMe web extension to their end-users.

WalkMe Self-Hosted Model

Unlike the Pure SaaS model, where the WalkMe content data is stored on Amazon, the Self Hosted model differs in that it enables our customers to store WalkMe content files on their own web servers. This allows the end-users' browser to download both the customer's website and WalkMe's data from the same web server.

In the Self Hosted model, content creation itself still occurs on WalkMe's servers. In order to obtain and host the WalkMe content files created upon each published event, the customer must download these files from WalkMe Insights and manually place them on the selected local web server. An alternative method to manually downloading a new package is to reach out to WalkMe's self-hosted API in order to request a new copy of the self-hosted package.

For accessing WalkMe's self-hosted API, please contact your WalkMe team.

As self-hosted, the customer would be responsible for caching WalkMe data files. Unless required differently, the cache times of the WalkMe data files should be adjusted to their cache times in our S3 servers, as follows:

1. Snippet file (e.g. walkme_ad62641c4a1949d6aabaf3291ede28bd_https.js) – cache time should

be 1 day (max-age = 86400)
2. Settings file (settings.txt)
   For Production or custom environment – cache time should be 15 minutes (max-age = 900);
   For Test or Success – cache time should be 5 minutes (max-age = 300)
3. data files (e.g. data_c3fe4caa6b45405aa33e0bfe600b7d75.js, data_c3fe4caa6b45405aa33e0bfe600b7d75_es.js) – cache time should be 1 year (max-age = 31536000)
4. widget file (e.g. widget_02449c3b1fe64510b82af00cc417d485.js) – cache time should be 1 year (max-age = 31536000)
5. walkme_config file (e.g. walkme_config_bbd8ad778afd45f5affdc525677b5a17.js) – cache time should be 1 year (max-age = 31536000)
6. lib files (all the files in player/lib folder, e.g. maketutorial_lib_3320.js) – cache time should be 1 year (max-age = 31536000)
7. resources files (all the files in player/resources folder, e.g. wmjQuery14231.js) – cache time should be 1 year (max-age = 31536000)
8. prelib files (e.g. prelib-plugin-90596a6d-7fbe-48dd-acf8-de5d69b0556b.js) – cache time should be 1 year (max-age = 31536000)

For more information on how to configure your servers for self-hosted, please review our Support article.

Injection via Tag Manager

If you have Google Tag Manager in place, or any other Tag manager such as Adobe Tag Manager or Tealium, embedding the WalkMe snippet into your website's HTML should simplify, as you will no longer need to embed the snippet in each page.

You will just need to add a new script under your Tag Manager, add your WalkMe snippet without the <script> tags, and make sure that it is set to inject on all pages.

For more information on the Google Tag Manager specifically, please review our Support article.

Deployment Methods

WalkMe Player Extension

The Player Extension is an option for customers that are unable to paste the code directly into the source code of their site. The Player Extension is installed locally on each user's browser and injects the Snippet into the code of each page that is loaded. There are a few methods of installing the Player Extension, described below.

Mass Distribution

For customers that do not have access to the code of their application, we recommend using the Player Extension and deploying it through mass installation. Mass installation requires no action from end-users, increases adoption, and is easily implemented and controlled by your IT department.

From a high-level view, mass deployment is accomplished using automation scripts and built-in deployment features, and inside management tools such as SCCM, G-Suite or GPO, to enable the WalkMe extension on your end-users' browsers.

There are two parts to mass deployment:

1. Installation: Deploy the extension package to your end-users. This means placing the extension in your end-users' browsers usually with an MSI ("generic" extension) for Firefox or Internet Explorer, or via CRX if Chrome (to support existence on the Chrome store).
2. Configuration: Configure the extension to load published items from your company's WalkMe Editor. Identify the profile settings through the registry (by cookies, browser profile setting, or registry keys).

A detailed Master Extension Guide will be provided to you by your WalkMe team.

All in One Installer

WalkMe's All-in-One Installer makes it easy for IT teams to widely deploy the WalkMe Master Extension across all browser types with a single installer file. The All-In-One Installer helps new users complete the Mass Deployment process with ease, by offering simple installation through a single file, allowing cross-browser use and minimizing d ployment errors or malfunctions. It simply needs to be run by you or your IT personnel and it will automatically install on the relevant computers.

Supported browsers:

	Internet Explorer	Edge	Safari (12v and up)	Firefox	Chrome
Windows	✓	✓		✓	✓
Mac			✓	✓	✓

Prerequisites:

- In order to properly implement WalkMe using the All-In-One (AIO) installer, the following conditions should be met:
- Master Extension must not be installed for any of the browsers, whether it was installed manually or through Mass Deploy (Must for Internet Explorer).

- If a Master extension is installed on any of the browsers, please make sure to have it removed prior to installing WalkMe using AIO.

More information on the All-In-One Installer can be found in our **Support article**.

Manual Installation

When the mass installation of the Player Extension is not possible, users may manually install the Extension. To manually install the Player Extension, users are pointed to a unique URL with the Player Extension installation page. Alternatively, depending on the platform, users may be able to use the Package Installer solution described below.

For selected platforms, we can create a banner that will display and encourage the user to click it to download/install the Player Extension. Currently, we support this method for the following applications:

- Salesforce
- SuccessFactors
- Office365
- Microsoft Dynamics

Please inform your WalkMe team what is the desired type of Deployment.