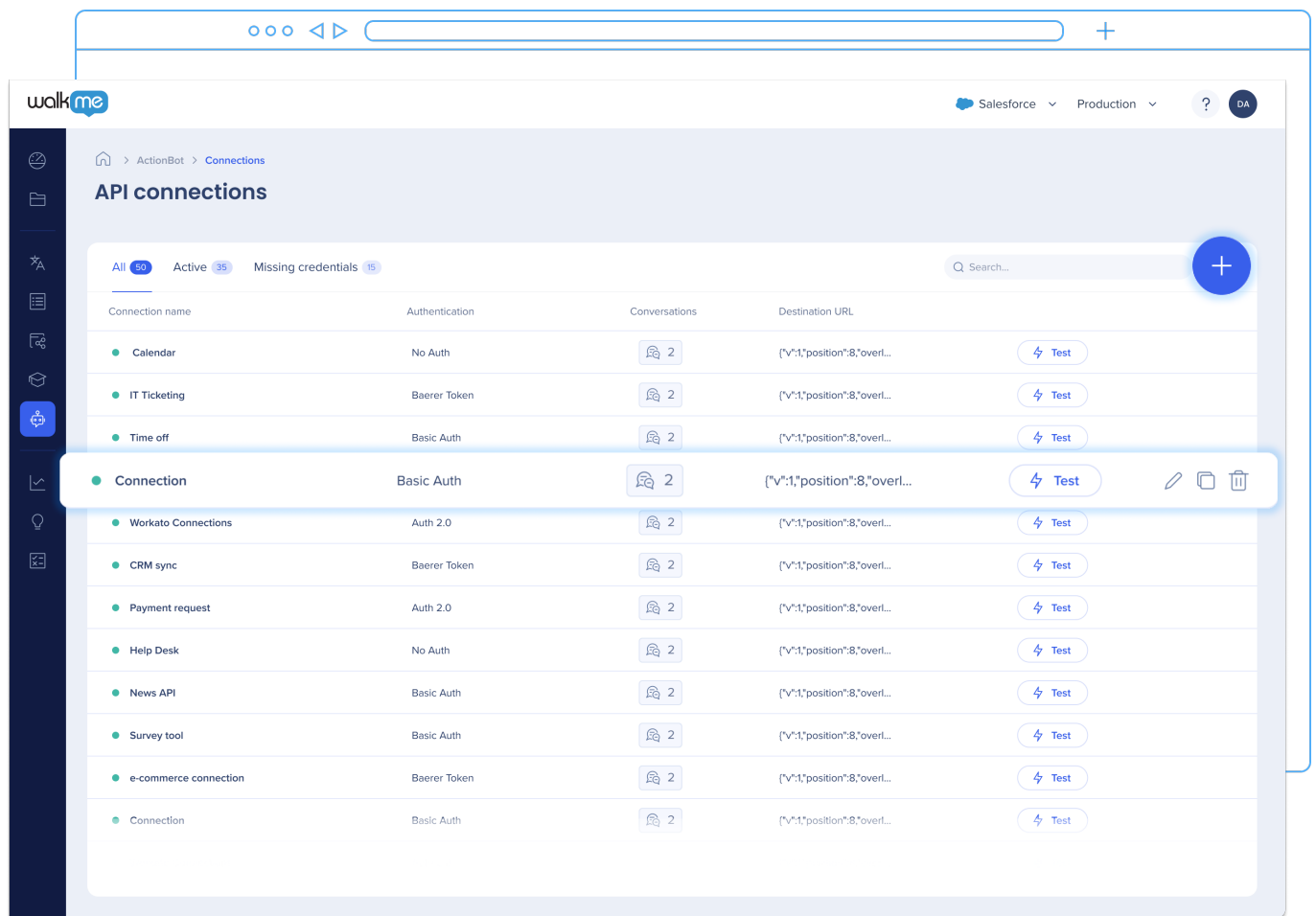


ActionBot Connections on Console

Brief Overview

The API Connections page in the WalkMe Console for ActionBot is where you can manage your conversation's [API connections](#). Here, you can view a list of your connections, run tests to ensure everything's working as expected, and even see which conversations are associated with each connection.



By April 2024, IDP will be required for connections

Organizations who create or edit a connection (in the Editor on on Console) will encounter a pop-up stating that **all existing connections will be deactivated on April 30th, 2024 if an IDP isn't set up:**

As part of our ongoing efforts to provide a secure platform, WalkMe will soon require all accounts to have an Identity Provider (IDP) in place for outgoing connections. An IDP helps authenticate users and applications, and adds an extra layer of security to your connections.

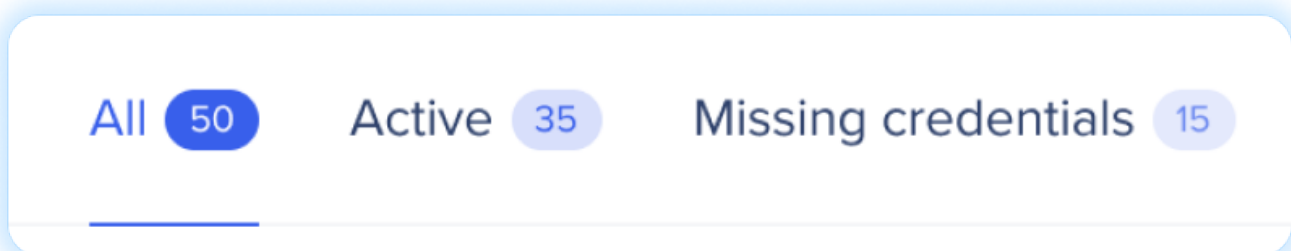
We highly recommend implementing an IDP before April 2024 to ensure uninterrupted access to your API connections. If you need assistance setting up an IDP or have any questions, don't hesitate to contact our support team.

Note that all existing connections will be deactivated on April 30th, 2024 if an IDP isn't set up. Thank you for your continued support and commitment to security.

Get to Know

The Connections page has a variety of features that will help you create and manage your connections. Let's review what it has to offer:

Tab Filters



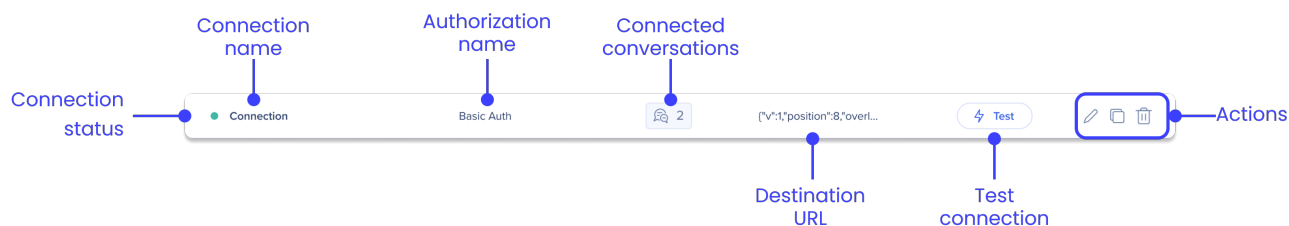
Easily navigate and filter through your API connections with the following tabs:

- **All:** View all connections in the table, regardless of their status.
- **Active:** Filter the table to display only active connections that are successfully integrated and functioning.
- **Missing credentials:** Quickly identify connections that require credentials or authentication details to be provided.

These tab filters allow you to organize and focus on the connections that meet your specific needs, ensuring efficient management and troubleshooting.

Connection Anatomy

Let's review each of the columns and the overall anatomy of a connection. Going across the line from left to right, starting with the little dot (or warning symbol).



Connection status: This will be green if all of the credentials for the connection are filled out during creation. The dot will change to a warning symbol and the entire line will be yellow if the connection is missing credentials.

Connection name: This is the name of that you gave the connection when it was created

Authorization name: The authorization type chosen when creating the connection. An authorization can be used for multiple connections. Authorization options include:

- Basic auth
- Bearer token
- OAuth 2.0

Connected conversations: Click the icon to open a list of all conversations that use this connection.

Destination URL: The web address or endpoint where the API request is sent to or received from during bot conversations.

Test connection: Verify the functionality and connectivity of the API connection, ensuring smooth communication between your bot and external systems

Actions: Available actions include:

- **Coming soon!** Edit connection: Opens the Editor so the builder can navigate to the ActionBot Connections page
- Duplicate connection: Makes a duplicate of the connection
- Delete connection: Deletes the connection
 - Note that deleting connections effects all conversations this connections was added to

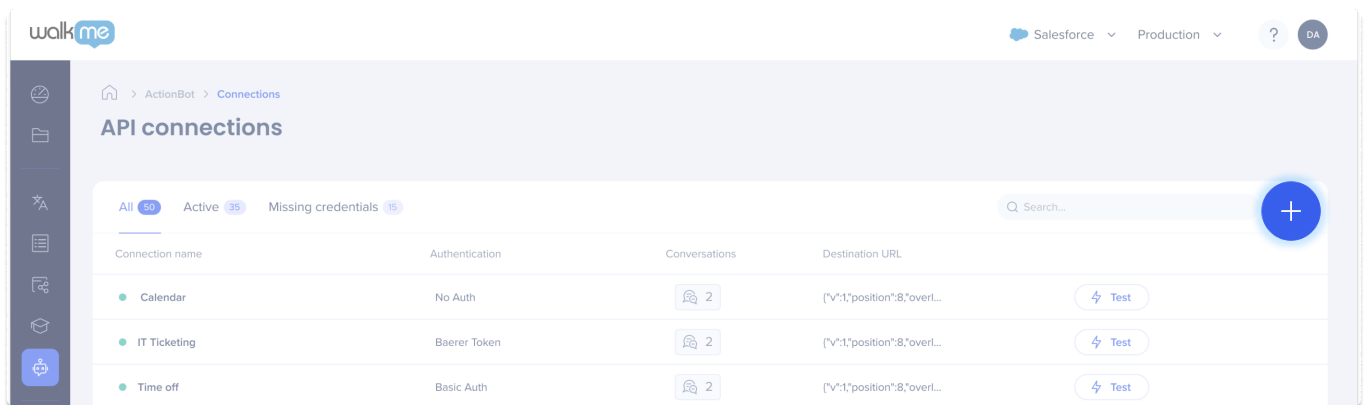
How to Create a Connection

Create a new API connection directly from the API Connections page on Console. Connections created in the Console will be added to the Editor so you can use them to build your conversations.

Coming soon!

Soon you'll be able to create connections from the Connections page on Console. [Subscribe to our Release Notes](#) to be the first to know when this is available.

Until this feature is released, connections are still made in the Editor. Click the plus icon in the top right corner of the page to open the ActionBot in the Editor.



Before you create your connection, prepare the following (click to reveal)

- What authentication does it require?
- What does it need to receive?
- What is the format of the response (what's considered a successful response)?
- What does the response contain?
- Read the API documentation to understand the Authentication, request and response format.
- Use Postman to validate the API and that it is working for you.
 - Postman is a software designed to test APIs. So if you test your API there by inserting authentication method, sending a request, and getting an expected success response then that means the API is working as expected. If you encounter any issues when testing this in the bot itself then you can be sure that the issue is bot related and not related to the API.
- If this is for a customer, ask them to share a working Postman Collection and to provide you with credentials to use it. (**Recommended:** Do all of this to a sandbox environment)
- Once you have the API working in postman you can go to the ActionBot and create a new Connection and a call connection step to your conversation according to the steps listed in this article

Step 1: Create and name the connection

1. Click **Create new connection** (the plus icon)
2. In the first step of the Create API connection popup, **name the connection**

- You can name it whatever you want, we recommend giving it a name that represents the destination

3. Click **Next**



Step 2: Select or create authorization

Now you'll add the authorization for this connection, you can either **create a new one or select an existing authorization**. If you choose an existing authorization, then continue to step 3: Connect destination URL.

1. Select **New authorization**
2. In **Authorization name**, name the authorization (it can be whatever you want)
3. In **Authorization type**, select the required authorization type for the application you are connecting to.
 - The following types of authentication are supported:
 - **No Authentication:** Doesn't require any info
 - **Basic Authentication:** Requires user+password
 - **Bearer Token:** Require an authentication token. Note- when choosing Bearer token, you can choose to use the token of a previously defined salesforce connection.
 - **OAuth 2.0:** Require client secret, access token and Client ID and allows you to define the scope of the connection.
4. Fill in the required fields for that authorization type
5. Add a header (if required by API owner)
6. Click **Next**



Step 3: Connect destination URL

Now you can add the destination URL and the request type.

1. Select the **Request type** provided by the API owner:
 - GET
 - POST
 - DELETE
 - PUT
2. Add the **Destination URL** provided by the API owner
 - Destination URL may contain dynamic query parameters. To create a dynamic query parameter within a destination URL, wrap the string value with curly brackets. For example <https://test.api/{production}/>
 - Destination URL may also contain BBcode variables allowing users to map the dynamic URL parameters to the end-user responses or to use BBcode supported environment

variables such as wm-data, cookies, and jquery

3. Add any additional headers required from the API owner

1. Unlike authorization headers, which are utilized for every authorization instance, the headers added to the destination step serve the purpose of establishing a connection exclusively for this specific connection

4. **Coming soon!** Click **Test** to verify the URL is legal

- Test responses will be either Successful or Failed

5. Click **Create**



How to Test a Connection

To test if your connection works:

1. In the table, go to the API connection you want to test
2. Click **Test**
3. The results of the connection will appear at the top of the page:
 - A green box with a success message means the connection was successful
 - A red box with a failure message means the connection failed

How to Edit a Connection

To edit a connection:

1. In the table, hover over the API connection you want to edit
2. Click the **pencil icon** to open the Editor
 - Refer to [the Connections article for information about Connections in the Editor](#).

Coming soon!

Soon you'll be able to edit connections from the Connections page on Console. [Subscribe to our Release Notes](#) to be the first to know when this is available.

How to Duplicate a Connection

To duplicate a connection:

1. In the table, hover over the API connection you want to duplicate
2. Click the **duplicate icon**
3. Done! Note that authentications aren't duplicated. So you'll need to edit the connections to

add new authentications.

How to Delete a Connection

To delete a connection:

1. In the table, hover over the API connection you want to delete
2. Click the **trash icon**
3. A popup will appear informing you that deleting a connection that is associated with a conversation will break the conversation. We recommend unpublishing these conversations as they will no longer work after the connection is deleted.
4. If you are sure you want to delete, click **Delete**

Recording

