

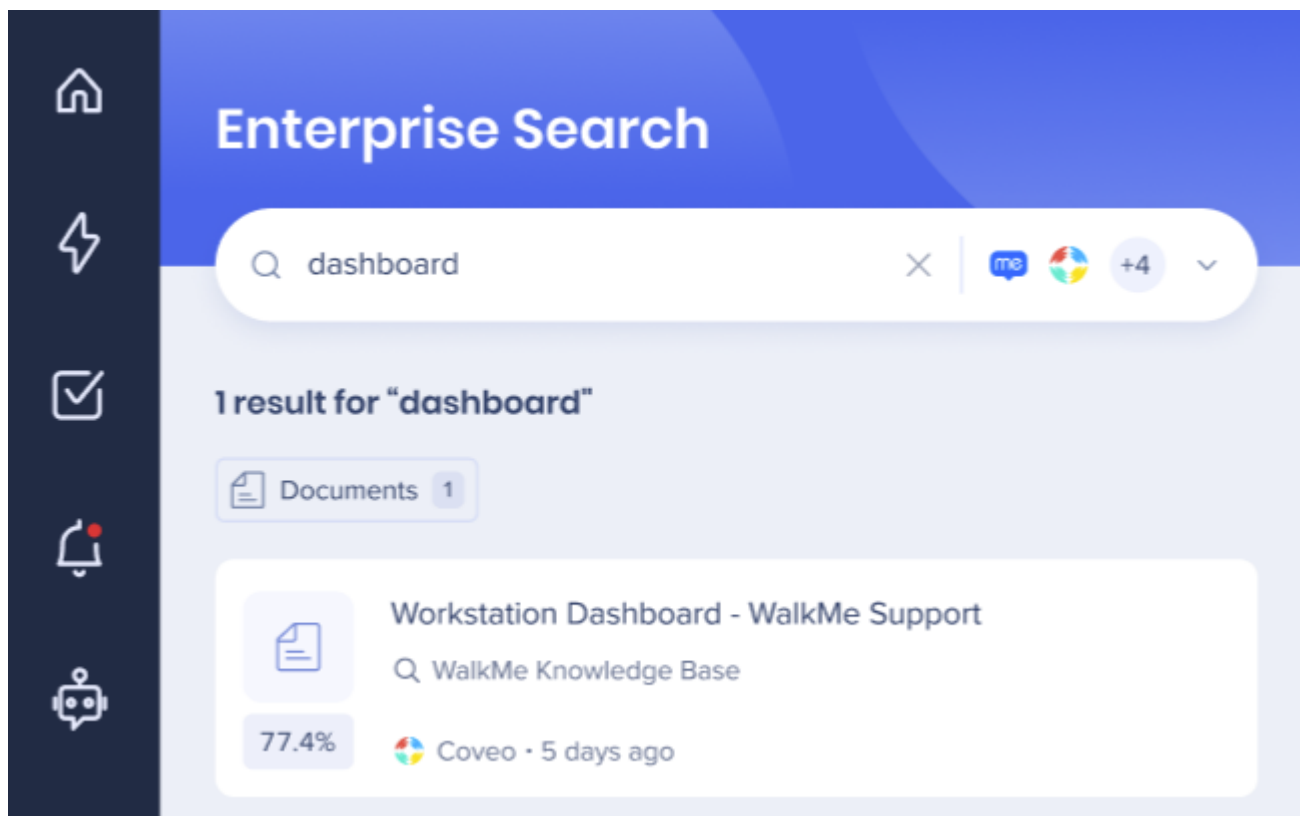
Coveo Integration

Brief Overview

Coveo is a software-as-a-service search engine which integrates to different application. It is often used by IT, support, sales, marketing, finance, and HR teams.

Get to Know

You can integrate Coveo to your Workstation enterprise search to easily find items across platforms.



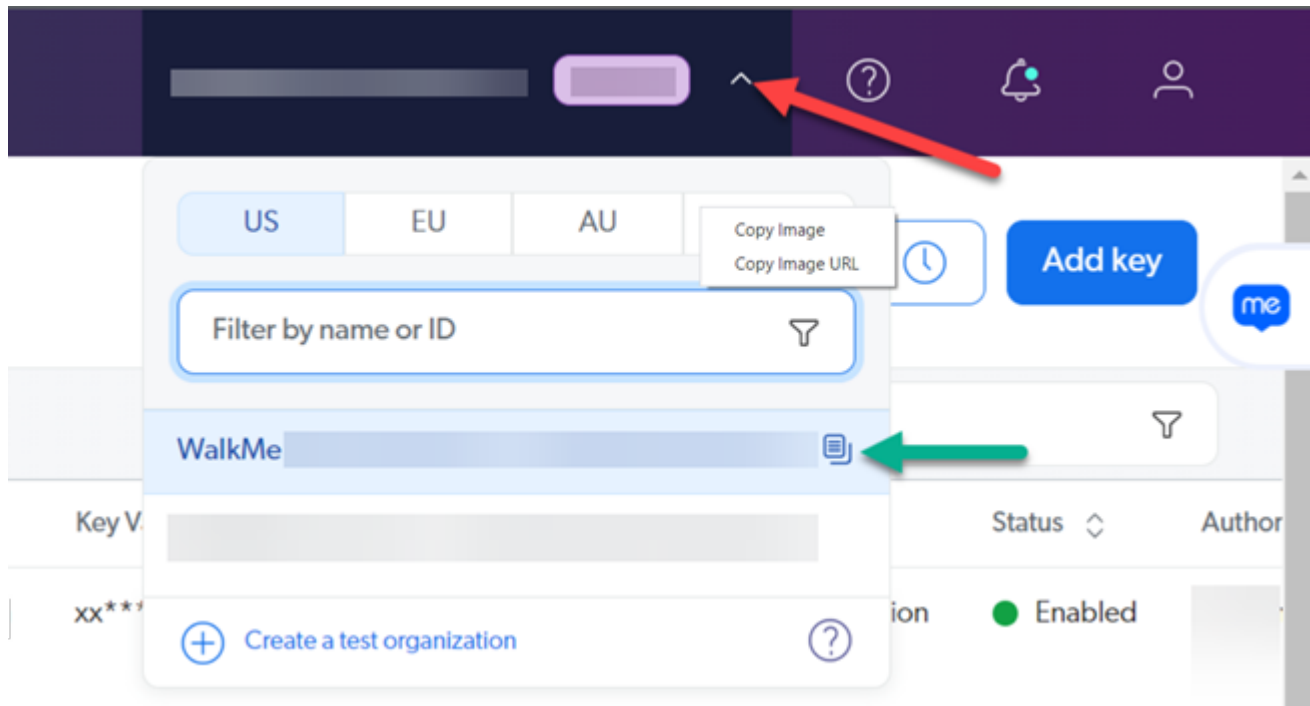
Configuration details

This integration requires an API configuration so it can be added to the integrations list on Workstation. To configure this app, you'll need:

- Admin permissions to Coveo
- Access to the Workstation Integrations page on WalkMe Console

Step 1: Get Organization ID

1. Login to your Coveo Administration Console
2. Click the **environment dropdown** on the top right
3. Click the **Copy Org ID** of the org you want to connect to Workstation
4. Paste it somewhere accessible, you'll need it later



Step 2: Add API Key

1. Open the left hamburger menu, go to **Organization -> API Keys**
2. Click **Add Key**

Step 3: Edit API Key

1. Go to the **Configuration** tab
2. Type **Workstation** in the **Key Name**

Add an API key ?

Configuration Privileges Access

Key name

Description

Allowed IPs

IP Address (Optional)

3. Go to the **Privileges** tab -> **Analytics** section
4. Change the **Access Level** of the following fields:
 - o **Analytics data:** select **Push**
 - o **Impersonate:** select **Allow**

Edit an API key: Workstation ?

Configuration **Privileges** Access

	Name	Access Level	Can Create
Analytics	Administrate	—	—
	Analytics data	Push	—
Content	Analytics data	—	—
	Data exports	—	—
Machine learning	Data exports	—	—
	Data health	—	—
Organization	Data health	—	—
	Delete user data	—	—
Search	Dimensions	—	—
	Impersonate	Allowed	—
	Incoherent events	—	—

Edit an API key: Workstation ?

Configuration Privileges **Access**

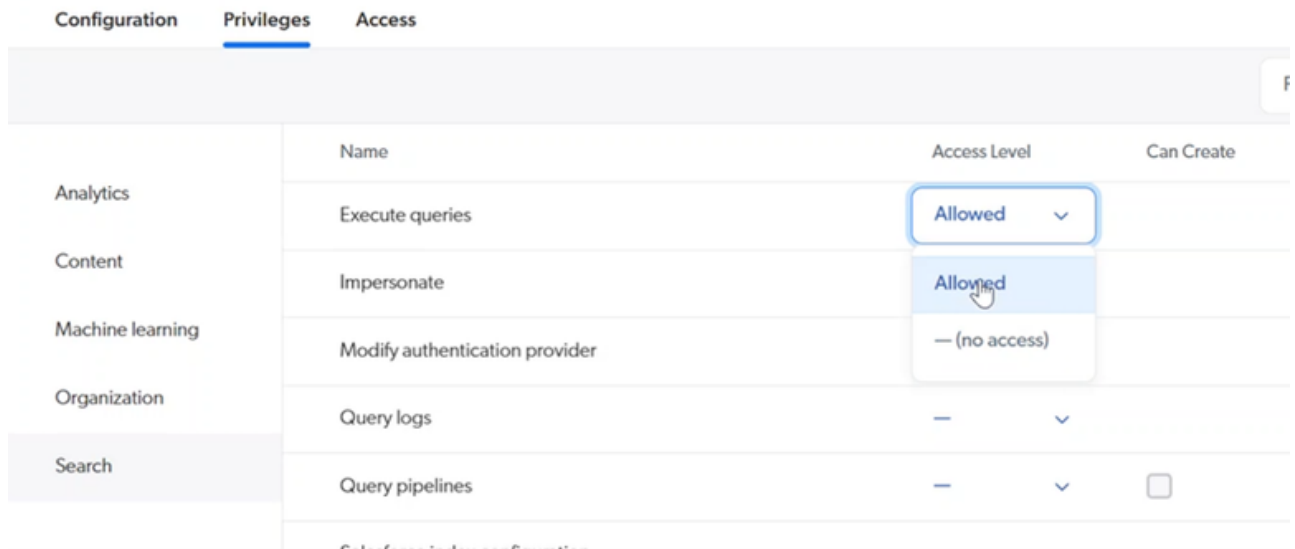
Preset: Custom

	Name	Access Level	Can Create
Analytics	Administrate	—	—
Content	Analytics data	Push	—
	Data exports	—	—
Machine learning	Data exports	—	—
	Data health	—	—
Organization	Data health	—	—
	Delete user data	—	—
Search	Dimensions	—	—
	Impersonate	Allowed	—
	Incoherent events	—	—

5. Still in the **Privileges** tab, go to the **Search** section

6. Change the **Access Level** of **Execute queries** to **Allowed**

Add an API key [?](#)



7. After selecting 'Allowed' a popup will appear, select the **API Key Scopes** that you want Workstation to pull search results

Step 4: Create API Key

1. Click **Create API Key**
2. On the Your API key popup, click **Copy to clipboard**
3. Paste it somewhere else, you'll need it later

Step 5: Set up Coveo in WalkMe Console

1. From the Console NavBar, go to **Workstation -> Integrations** page
2. Find Coveo in the list of integrations and click **Setup**
3. Paste the information you copied from Coveo into the form:
 - In Organization ID: Paste the **Org ID** that you previously copied
 - In API Key: Paste **API Key** that you previously copied

Configuration Setup ×

This app uses public data and does not require users authentication. Therefore it will be connected automatically for all users.

Organization ID

The client identifier for background authentication.

API Key

Static identifier for your application on Workstation.

Custom Data Source Property

Field schema name that displays the source of the search result

[Reset Data](#)

[Cancel](#)

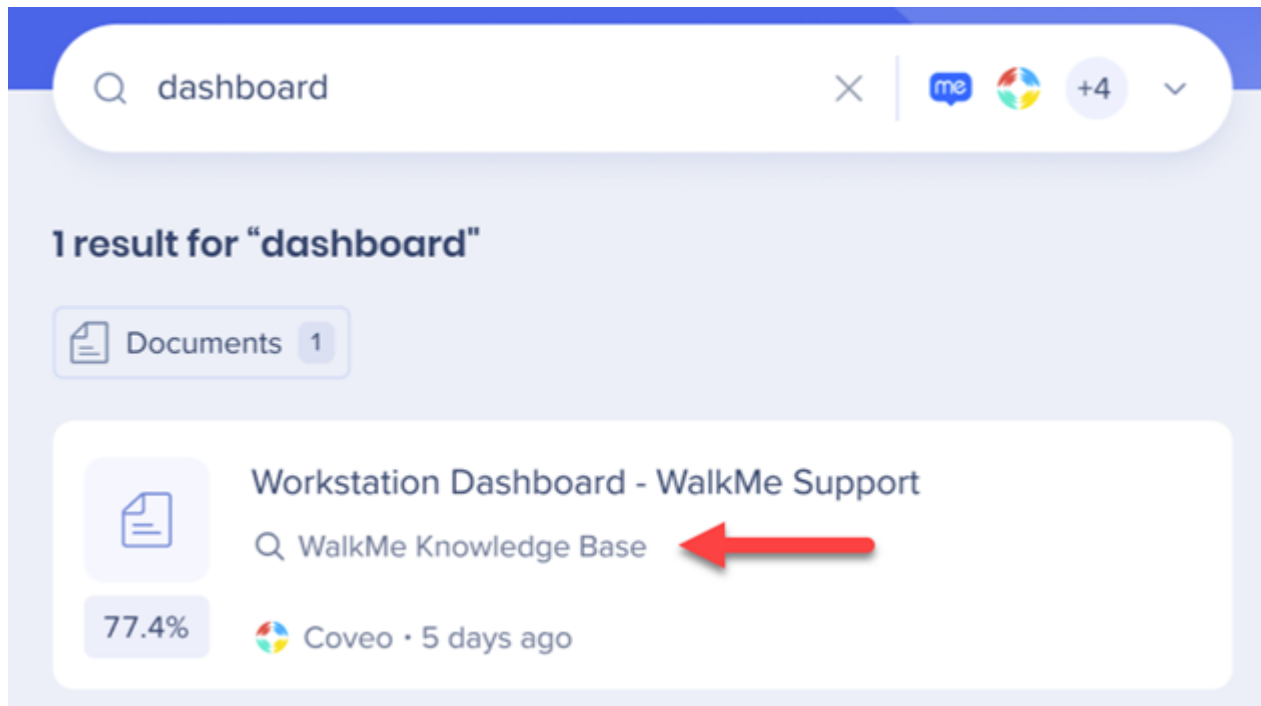
[Save](#)

Step 6: (Optional) Create Data Source Property

Since Coveo can integrate with other 3rd parties, Workstation can display the source of search results next to the magnifying glass.

If this is not populated, a default field called **objecttype** is used.

If the objecttype field is empty, there isn't a source data to display so the magnifying glass won't display either.



Limitations

- Search results without a title won't be displayed