

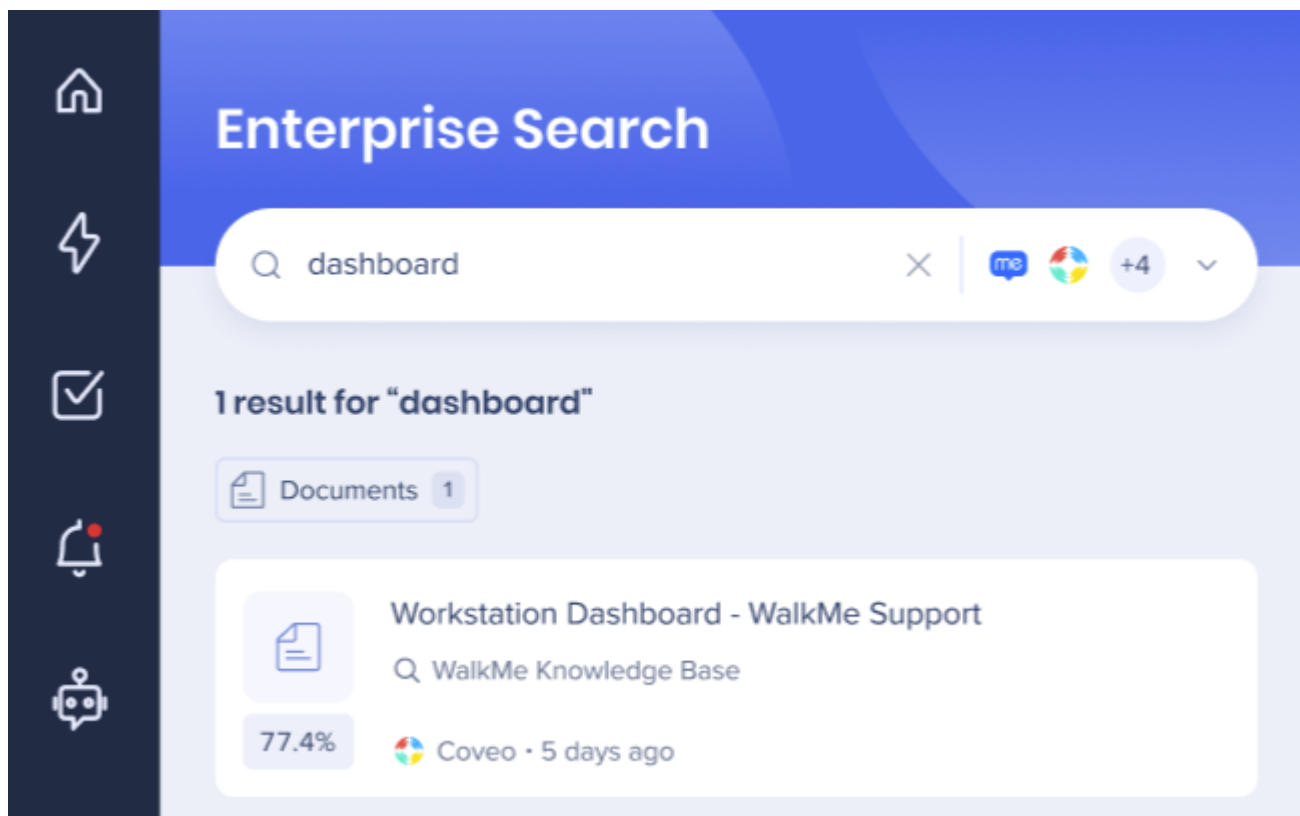
# Coveo Integration

## 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.



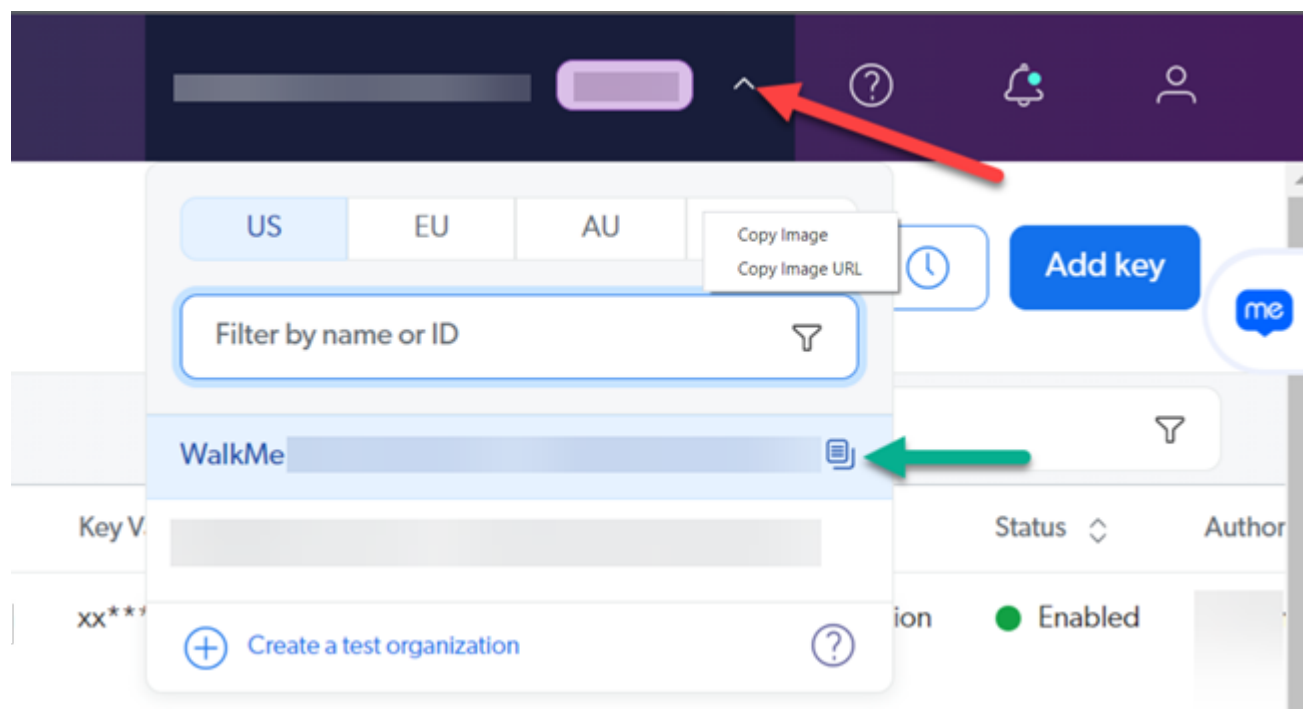
## Configuration details

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:
  - **Analytics data:** select **Push**
  - **Impersonate:** select **Allow**

Edit an API key: Workstation [?](#)

**Configuration** **Privileges** Access

**Analytics**

Name	Access Level	Can Create
Administrate	—	—
Analytics data	<b>Push</b>	—
Data exports	—	—
Organization	—	—
Search	—	—
Dimensions	—	—
Impersonate	<b>Allowed</b>	—
Incoherent events	—	—

Edit an API key: Workstation [?](#)

**Configuration** **Privileges** Access

Preset: Custom

Name	Access Level	Can Create
Administrate	—	—
Analytics data	<b>Push</b>	—
Data exports	—	—
Data health	—	—
Delete user data	—	—
Dimensions	—	—
Impersonate	<b>Allowed</b>	—
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 [?](#)

Configuration	Privileges	Access
	Name	Access Level
Analytics	Execute queries	Allowed
Content	Impersonate	Allowed
Machine learning	Modify authentication provider	— (no access)
Organization	Query logs	—
Search	Query pipelines	—

## 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 requires 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](#)

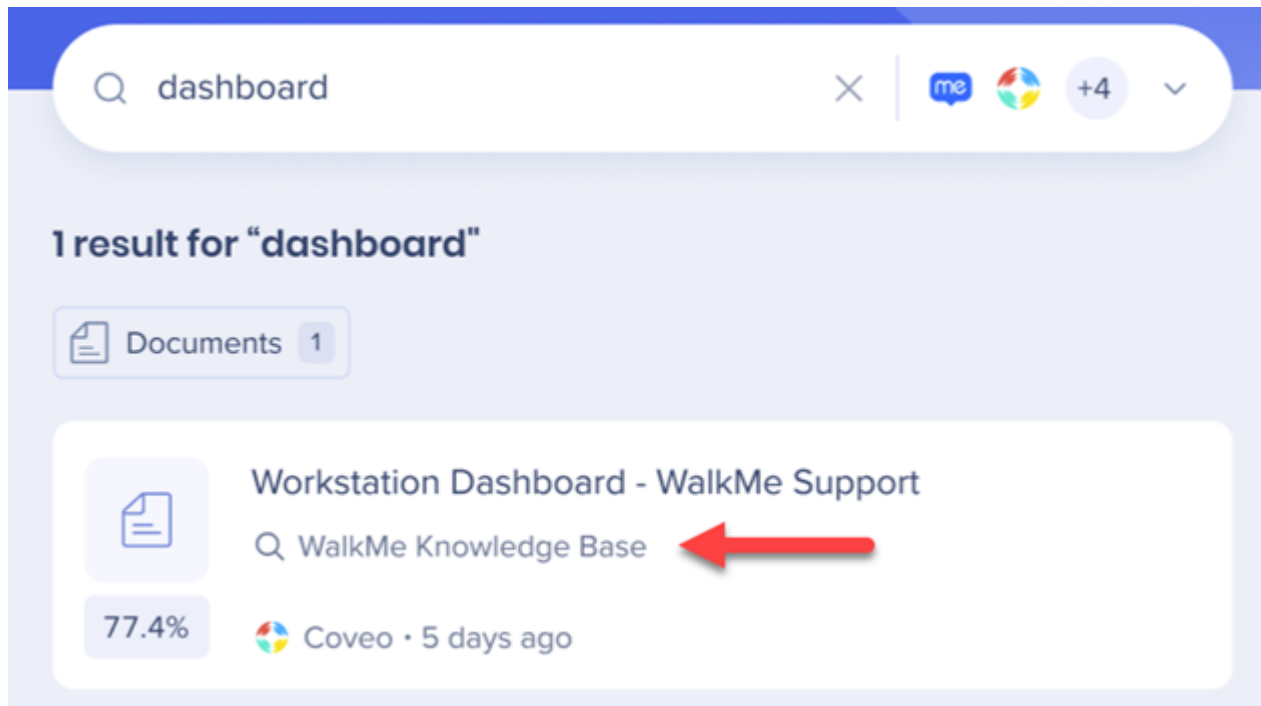
[Save](#)

## 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