

# AUTOMATION PRO I – LABS

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# Welcome to Automation Pro I

Hello, and welcome to Automation Pro I -- the first step on your automation journey!

This course, designed for learners who have little to zero experience in automation, has helped thousands of learners advance their skills and knowledge in automation.

In this course, you will be introduced to automation and guided through creating your first Workato automation recipe. And, by the end of the course, you will be prepared to take the Automation Pro I certification exam.

## Notes

We have designed labs to help you practice what you learn throughout this course. Each lab exercise will build on previous labs and lessons.

## Icons



The information icon will appear when there is important or additional information available about Workato.

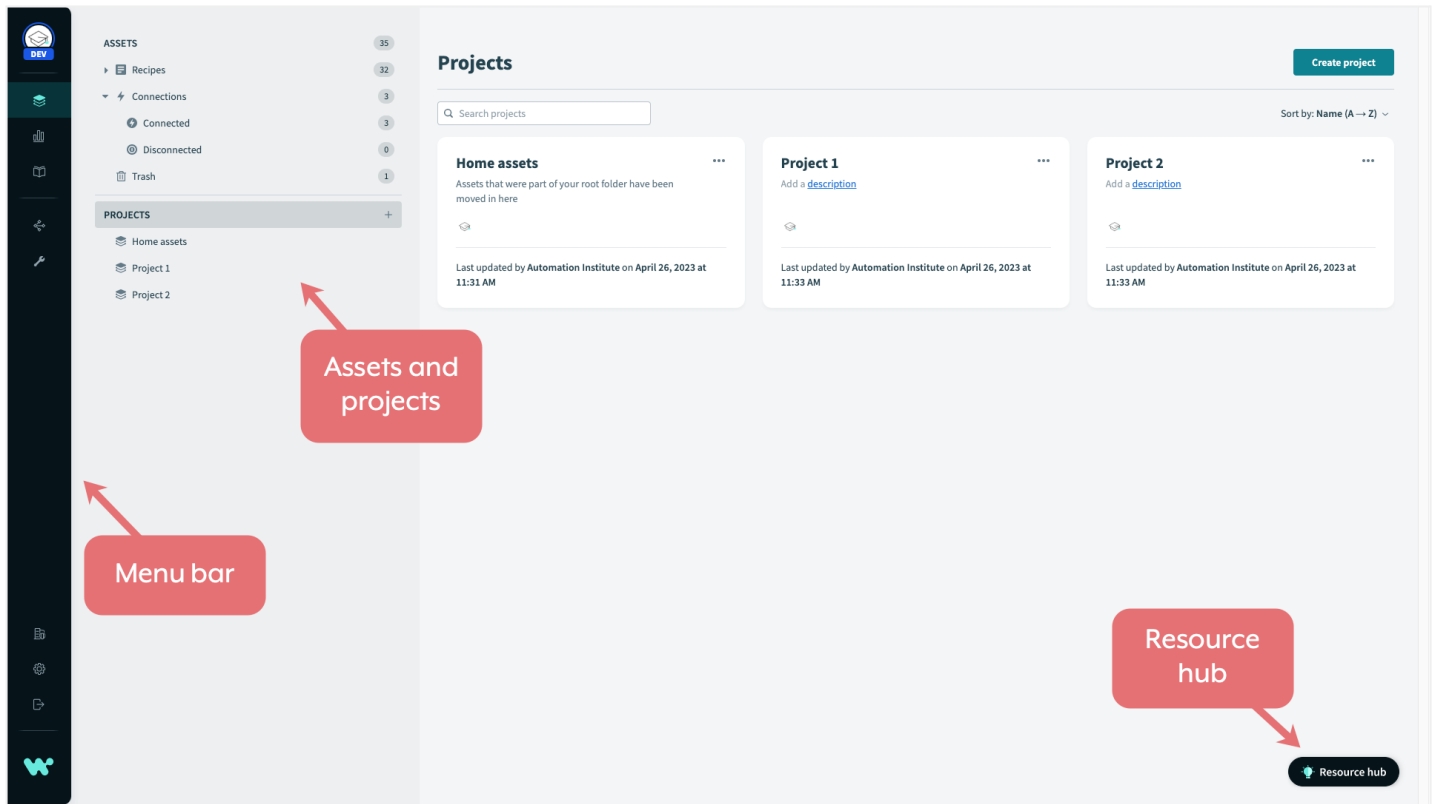


The attention icon indicates important information or a required step.

# Lab 1: Workato UI and projects

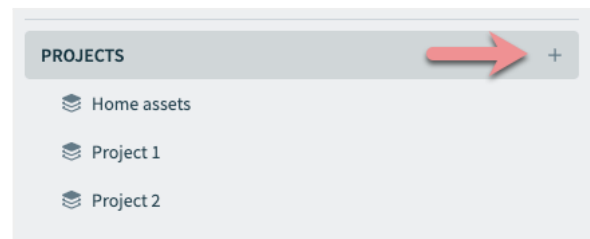
## Navigate Workato


Your Workato workspace is where your teams work together to automate business processes. On the left, you will see your **menu bar**. Next, you will see your **assets and projects**. In the lower right corner, you will see the **Resource Hub menu button**.

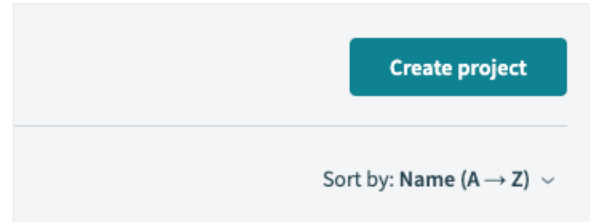


## Create a training project


Once you have logged in to your account, under **PROJECTS** click the **plus (+) icon** to add a new project.

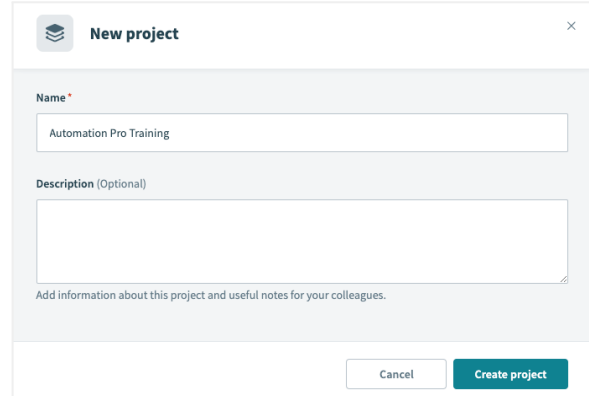


 You can also create projects by clicking the **Create Project** button.



Call this project **Automation Pro Training**.

 Throughout Workato, any field marked with a red asterisk is a required field and must be filled in.

A screenshot of a 'New project' modal window. The title bar says 'New project' with a close button. The form has a 'Name' field with a red asterisk and the text 'Automation Pro Training'. Below it is a 'Description (Optional)' text area with a placeholder text: 'Add information about this project and useful notes for your colleagues.' At the bottom right are 'Cancel' and 'Create project' buttons.

## Lab 2 prep

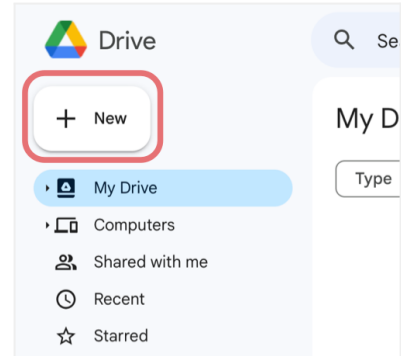
 A Google account is **required** for Automation Pro I labs.

To complete the lab activities for this course, you will need access to a Google account. We recommend using sandbox instances of any applications you connect to during recipe design to avoid affecting production data.

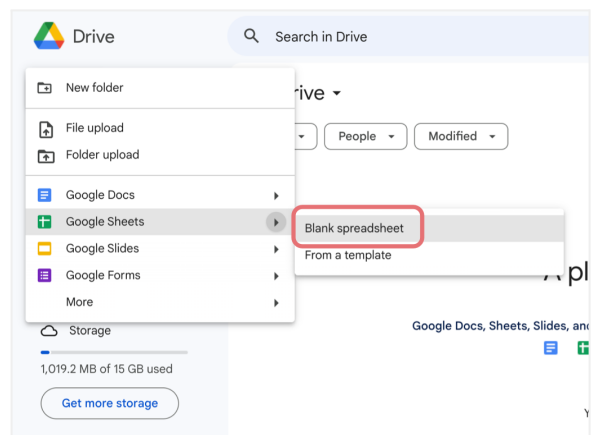
If you are unable to receive sandbox access to a Google account through your organization, you can create one for free at the Google Account sign in page: <https://accounts.google.com/signin>.

## Create your Customer Contact Info Google Sheet

In [Google Drive](#), click the **New** button.

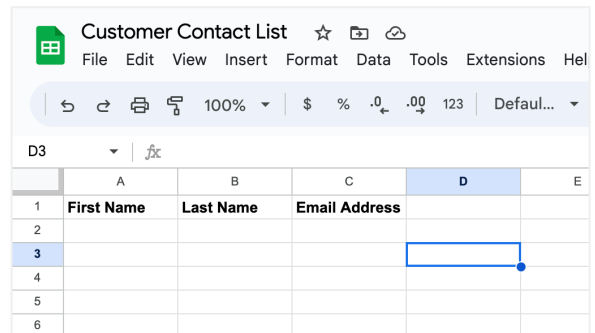


Choose **Blank spreadsheet** under **Google Sheets**.



Title your sheet **Customer Contact List** and add headers to three columns:

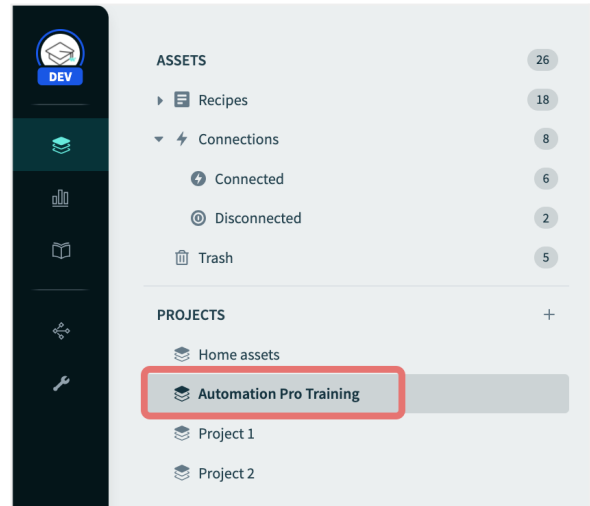
- First Name
- Last Name
- Email Address



## Lab 2: Create your first recipe

### Start building your recipe

To begin building your recipe, navigate into the training project you created earlier.

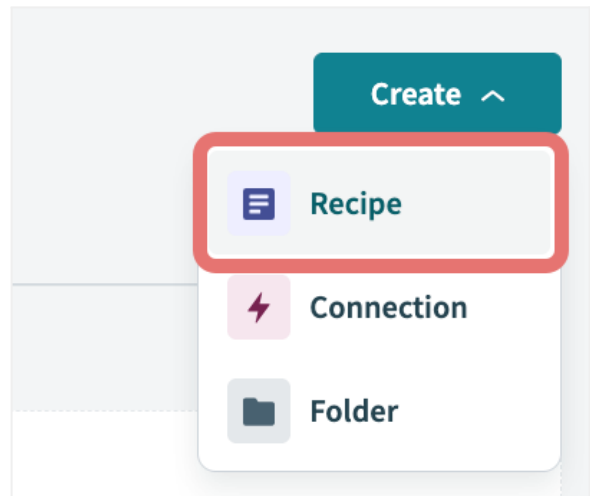


Click the **Create** button.

You will see three options by default: recipe, connection, and folder. Depending on your account type, you may see more options.

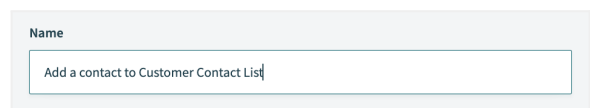
For now, let's click **Recipe**.

This will begin the recipe building process.



**i** It's a good practice to name your recipe in a way that makes it easy for you to find, based on what the recipe will accomplish.

Keeping that in mind, let's name this recipe **Add a contact to Customer Contact List**.

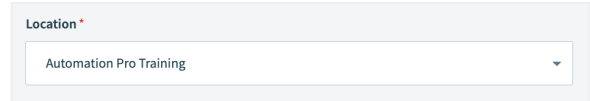


**i** Do note that leaving a recipe name blank will result in the creation of a name that is based on the trigger and actions which comprise the recipe.

Next, choose the **destination project** where you want to store your recipe.

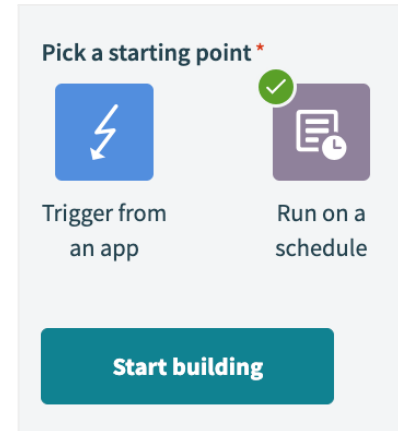
For this lab we are going to choose the project we're currently in: **Automation Pro Training**.

As we are using a scheduled trigger, let's select the starting point as **Run on a schedule** and click the **Start building** button.



Location \*

Automation Pro Training



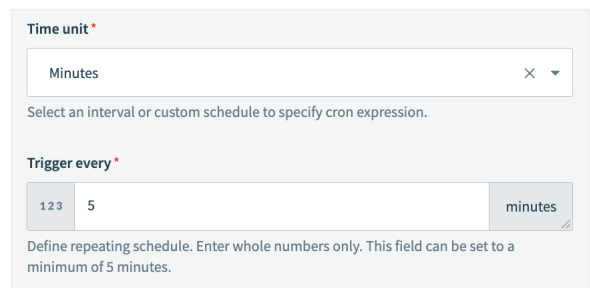
Pick a starting point \*

Trigger from an app

Run on a schedule

Start building

You may be required to choose the time interval between triggers. Let's set our interval at **5 minutes** for this lab.



Time unit \*

Minutes

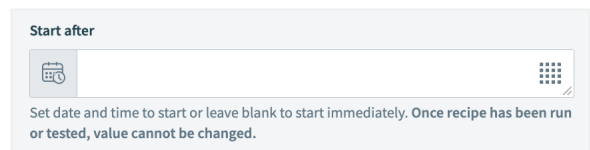
Select an interval or custom schedule to specify cron expression.

Trigger every \*

123 5 minutes

Define repeating schedule. Enter whole numbers only. This field can be set to a minimum of 5 minutes.

In the **Start after input field**, you can specify the date and time to start the first trigger event. For this lab, however, we will leave this blank.

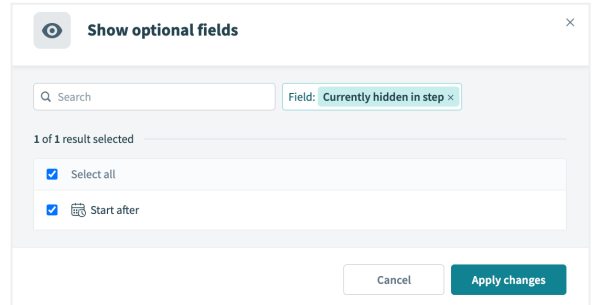
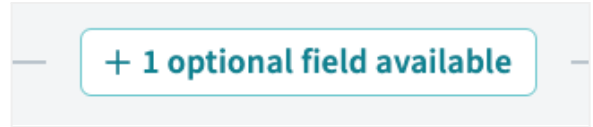


Start after

Set date and time to start or leave blank to start immediately. Once recipe has been run or tested, value cannot be changed.

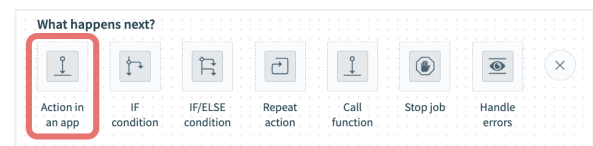
 When this input field is left blank, the recipe will start once we run it.

If you do not see the Start after input field, click **Show optional fields** to reveal any hidden fields. This option is available for most applications.

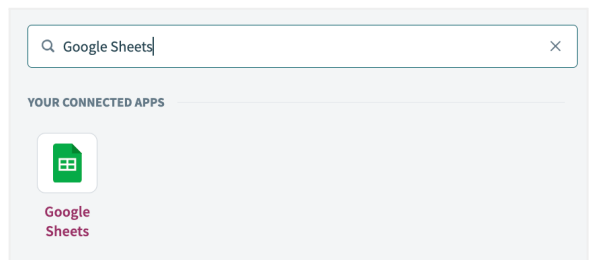


## Add an action in an app

Next, click the **plus icon** and choose **Action in an app**, as our action will involve the application, Google Sheets.

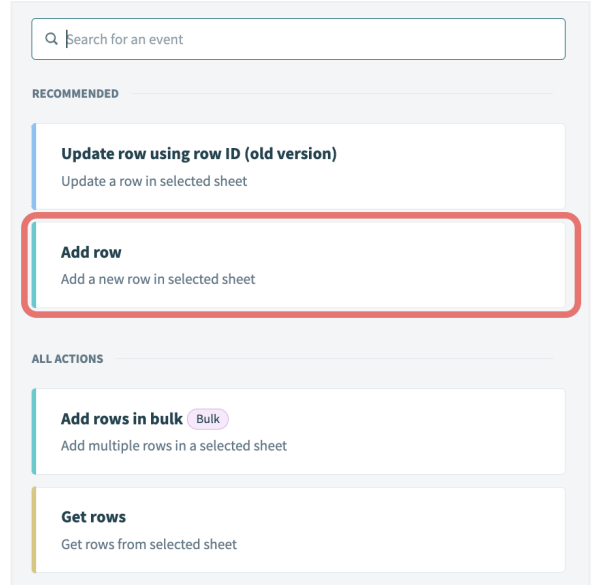


Search for and select the **Google Sheets** application.





For **Action**, choose **Add Row**, which will allow us to add a row to a specific Google Sheet.

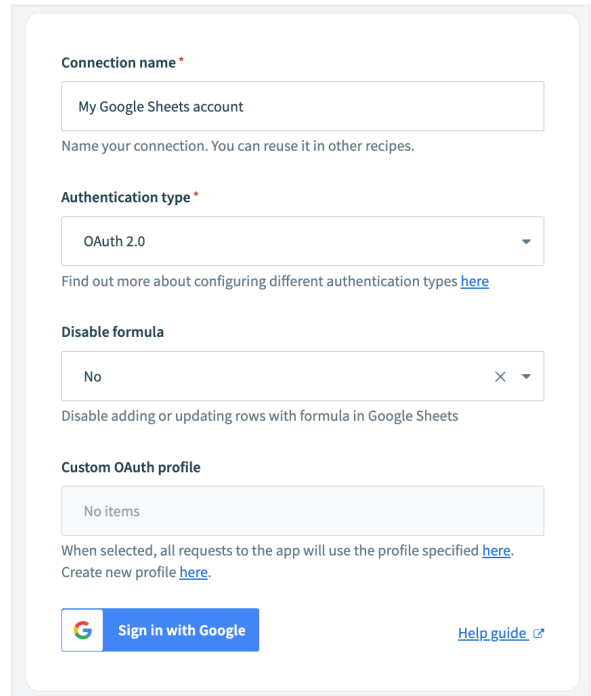


The screenshot shows a search bar at the top with the text "Search for an event". Below it, there are two sections: "RECOMMENDED" and "ALL ACTIONS". In the "RECOMMENDED" section, three actions are listed: "Update row using row ID (old version)", "Add row", and "Add rows in bulk". The "Add row" action is highlighted with a red border. Below the "RECOMMENDED" section, the "ALL ACTIONS" section contains two more actions: "Add rows in bulk" (with a "Bulk" tag) and "Get rows".

## Make a connection

Next, let's establish a connection to your Google Sheets account.

To create a new connection, give the connection a name, such as **My Google Sheets account**. Ensure the Authentication type is set to **OAuth 2.0** and click **Connect**.



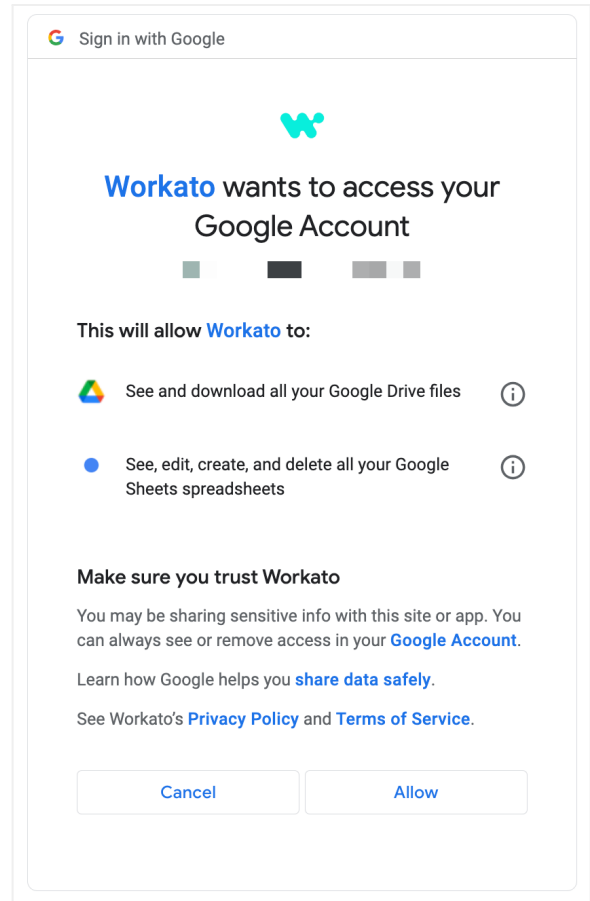
The screenshot shows the "Make a connection" form for Google Sheets. It has the following fields and options:

- Connection name \***: A text input field containing "My Google Sheets account". Below it, a note says "Name your connection. You can reuse it in other recipes."
- Authentication type \***: A dropdown menu set to "OAuth 2.0". Below it, a note says "Find out more about configuring different authentication types [here](#)".
- Disable formula**: A dropdown menu set to "No". Below it, a note says "Disable adding or updating rows with formula in Google Sheets".
- Custom OAuth profile**: A dropdown menu set to "No items". Below it, a note says "When selected, all requests to the app will use the profile specified [here](#). Create new profile [here](#)".

At the bottom, there is a "Sign in with Google" button and a "Help guide" link.

Then, input the **username and password** of your Google account to authenticate the connection.

If prompted to allow Workato access to Google Sheets, click **Allow**.



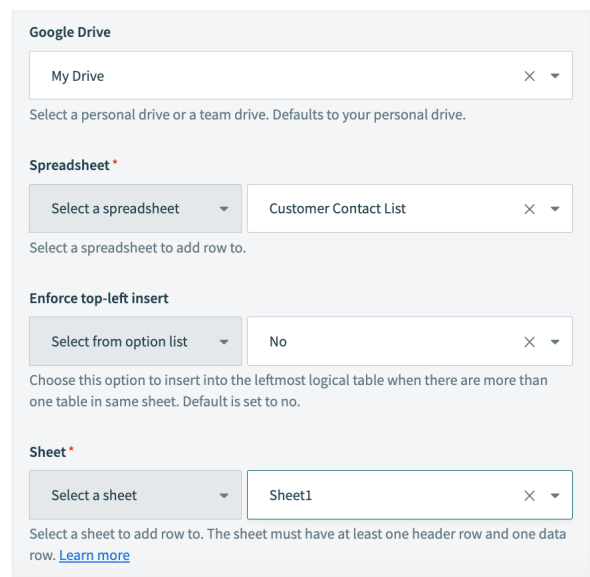
## Recipe configuration


Once connected, we will finish setting up our recipe.


For **Google Drive**, choose your drive from the dropdown list.

For **Spreadsheet**, choose the **Customer Contact List** spreadsheet we created during lab prep.

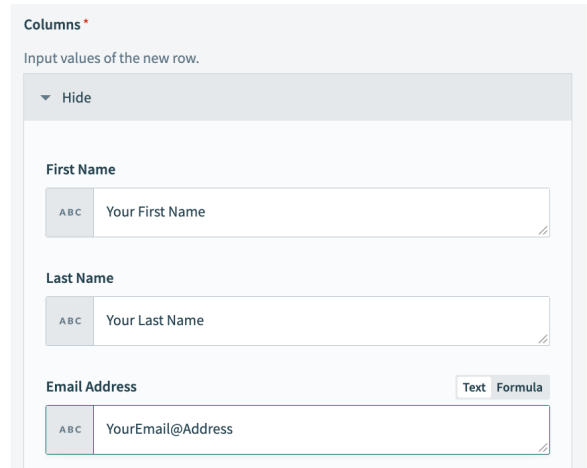
For **Sheet**, choose **Sheet1**.



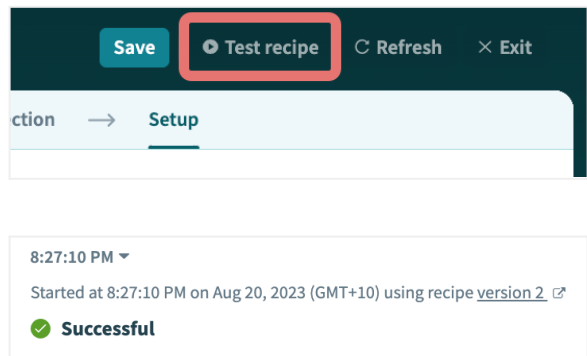
 All the fields that you can configure will then appear and all required fields in an action will be marked with a red asterisk, such as Columns.

 While we typically recommend *against* hardcoding values in Workato, for the purposes of this lab, we're going to input **Last Name, First Name, and Email Address** so you can see the immediate results of your first lab.

Go ahead and use your own contact information.



Click **Test Recipe** and wait for a successful result.



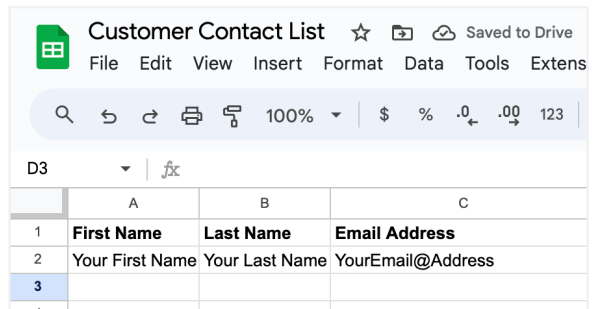
## Check your results in Google Sheet

Now, in your Google Sheet, let's find out if the contact has been created.

In **Sheet1**, you will notice that a contact has been created with the last and first name, as well as the email address, that you hardcoded.

**And that's it! You have created your first recipe!**

We'll build on this recipe as we learn more skills, so keep your Workato workspace open in another tab.

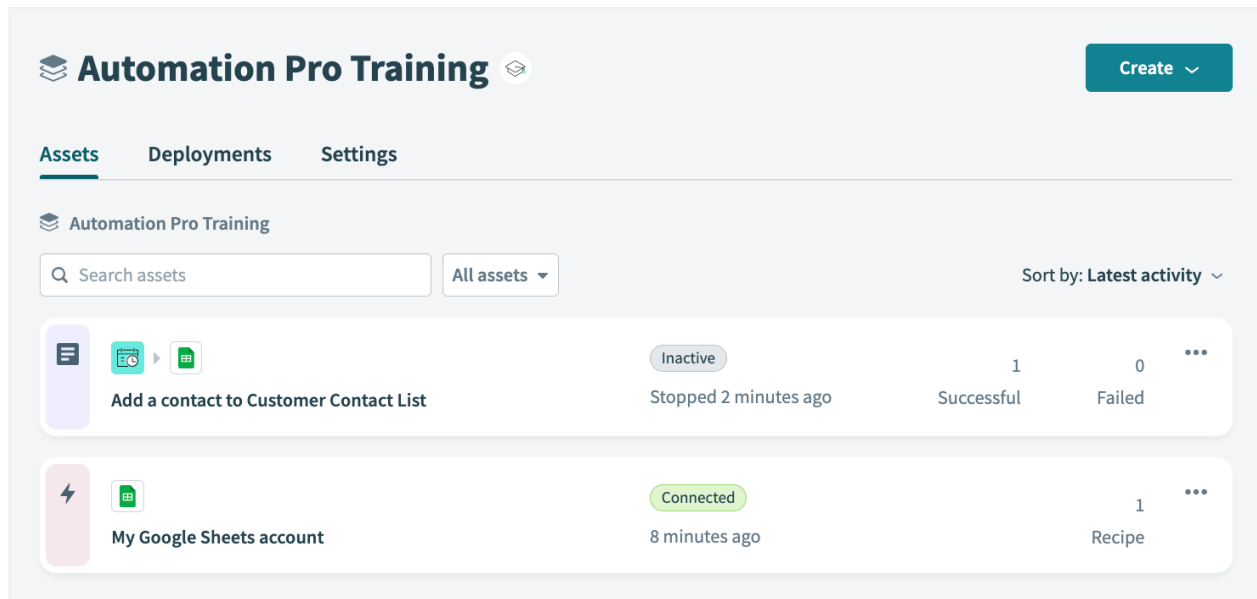


	A	B	C
1	<b>First Name</b>	<b>Last Name</b>	<b>Email Address</b>
2	Your First Name	Your Last Name	YourEmail@Address
3			

## Lab 3: Introduction to recipe design

### Create a new recipe

Back in your training folder, you'll notice the recipe you created earlier.



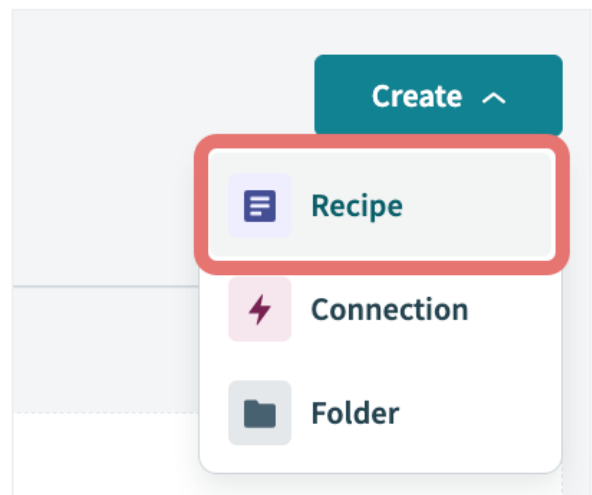
The screenshot shows the 'Automation Pro Training' interface. At the top, there is a 'Create' button. Below it, there are tabs for 'Assets', 'Deployments', and 'Settings'. The 'Assets' tab is selected. Underneath, there is a search bar for 'Search assets' and a dropdown for 'All assets'. To the right, it says 'Sort by: Latest activity'. The main content area displays a list of assets:

Asset Name	Status	Activity	Successful	Failed	More
Add a contact to Customer Contact List	Inactive	Stopped 2 minutes ago	1	0	⋮
My Google Sheets account	Connected	8 minutes ago		1	⋮



You can tell it's a recipe because it is identified with a purple recipe icon. Connections are identified by a pink lightning bolt icon.

Let's create a new recipe: click the **Create** button then **Recipe**.



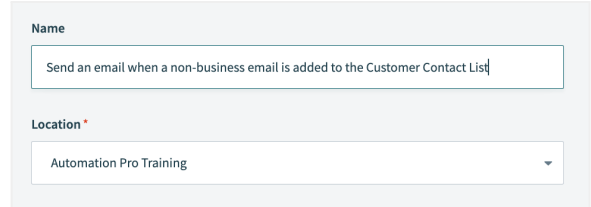
The screenshot shows the 'Create' dropdown menu. The 'Create' button is at the top. Below it, there are three options: 'Recipe' (with a purple recipe icon), 'Connection' (with a pink lightning bolt icon), and 'Folder' (with a grey folder icon). The 'Recipe' option is highlighted with a red border.

We're going to name the recipe, **Send an email when a non-business email is added to the Customer Contact List**.

Set the **location** as **Automation Pro Training**.

Because this recipe will be initiated by something happening in an app, let's choose **Trigger from an app** as our starting point.

Click the **Start building** button.

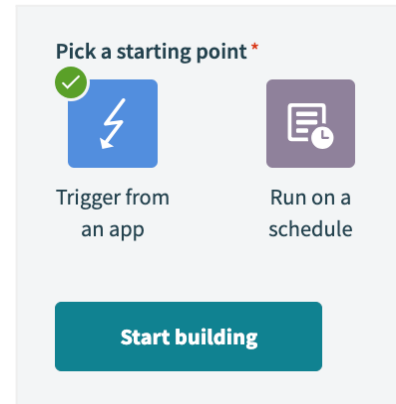


Name

Send an email when a non-business email is added to the Customer Contact List

Location \*

Automation Pro Training



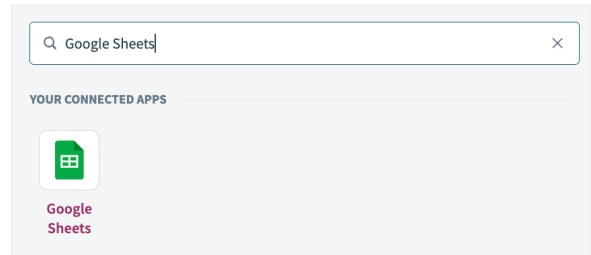
## Configure trigger

We're going to set our trigger application as **Google Sheets**.

We're going to choose the trigger **New/updated row in sheet in My Drive** but you will notice that two of the triggers have similar names.

We're going to choose the trigger with the **Real time** pill next to it to ensure Workato monitors the Customer Contact List in real time.

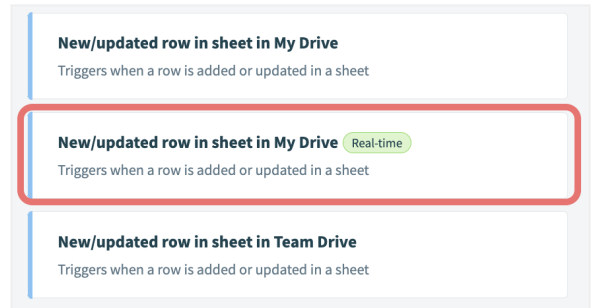
Choose the **Google Sheets** connection you created in the previous lab.



Q Google Sheets

YOUR CONNECTED APPS

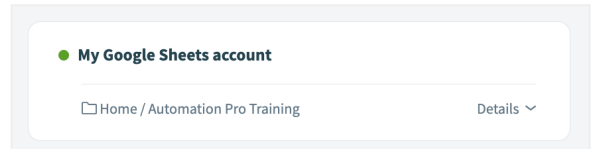
Google Sheets



New/updated row in sheet in My Drive  
Triggers when a row is added or updated in a sheet


New/updated row in sheet in My Drive **Real-time**  
Triggers when a row is added or updated in a sheet

New/updated row in sheet in Team Drive  
Triggers when a row is added or updated in a sheet



My Google Sheets account

Home / Automation Pro Training Details


 During configuration, we won't see the Google Drive field because our trigger specified that we are working in My Drive.

For **Spreadsheet**, choose the **Customer Contact List** spreadsheet we created during lab prep and updated in our previous lab.

For **Sheet**, choose **Sheet1**.

We'll see a new input field: **Column to monitor**. This will allow us to choose any columns we'd like Workato to monitor for us.

For the purposes of this lab, let's choose the **Email address** column.

 Some applications will allow you to set trigger conditions through a toggle control.

**Spreadsheet \***

Select a spreadsheet Customer Contact List ×

Select a spreadsheet to monitor for new row.

**Sheet \***

Select a sheet Sheet1 ×

Select a sheet to monitor for new row. The sheet must have at least one header row and one data row.

**Column to monitor \***

Email Address ×

Workato will monitor this column for changes. When a cell in this column changes value, the corresponding row will be consider as "updated" and triggers the recipe to run.

**Set trigger condition**

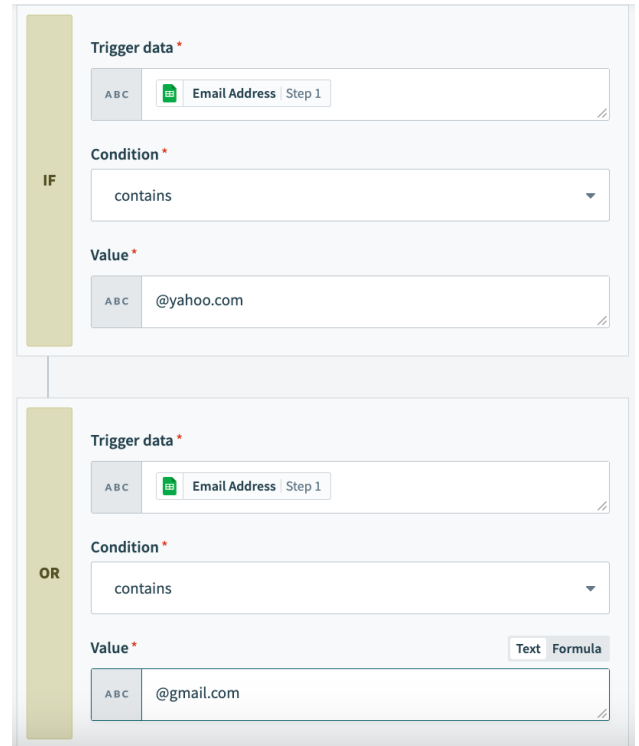
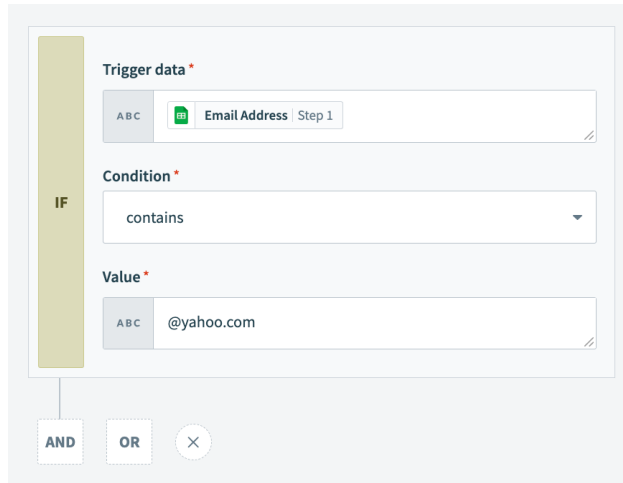
Only trigger events matching specified condition will be processed. [Learn more](#)

For this lab, let's set our **trigger data** to email by mapping the **Email address datapill** from **Step 1**.

You'll find this datapill nested under the Columns object.


The screenshot shows the Workato configuration interface. On the left, the 'Recipe data' section is visible, showing a 'New/updated row in sheet in My Drive' trigger. Below it, a 'Columns' list is shown with 'Email Address' highlighted in a red box. On the right, the 'Trigger data' section is visible, showing a mapping of 'Email Address | Step 1' to the 'Trigger data' field. Below this, the 'Condition' is set to 'IF' and the 'Value' field is empty.

Next, set the **condition** to **Contains** and the **value** of **@yahoo.com**.



We'll also add the **OR** condition to also check for the value of **@gmail.com**.

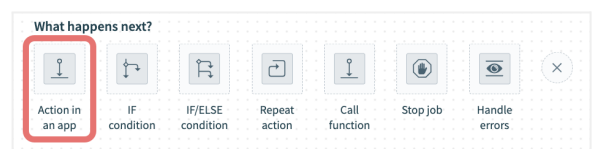
You can add as many non-business emails to this condition as you'd like by utilizing the OR condition.

 Keep in mind: values are case sensitive and should be exact.

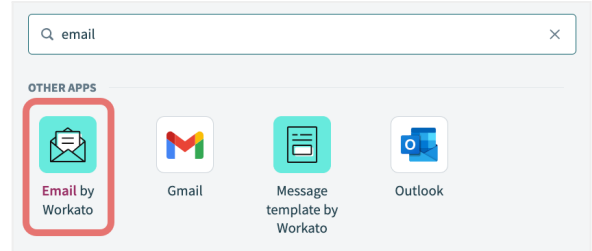
## Setup Email by Workato

Now that we have our trigger configured, let's add an action to send an email.

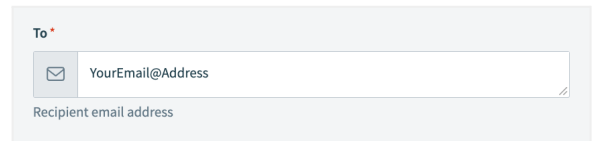
Now that we have our trigger configured, let's **add an action** to send an email.



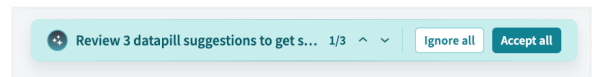
Let's search for **email** and choose Email by Workato as our app.



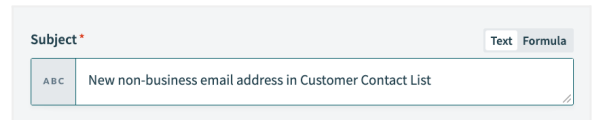
For the **recipient**, go ahead and **use your email address** so you can see the immediate results of your lab.



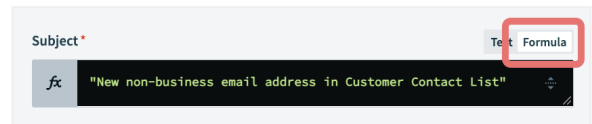
If you get a prompt to autofill fields with recommended datapills, just click **Ignore all**.



For **Subject**, type **New non-business email address in Customer Contact List**.



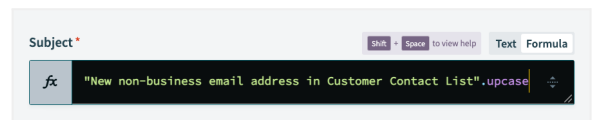
We want this subject to stand out in our inbox so let's utilize a formula to apply formatting to it.



**Toggle formula mode** and **encapsulate the subject in quotations**.

This will ensure the proper syntax is applied to the entire string and our subject will render correctly.

At the end of the string, type **.upcase** to display the email subject in All Caps.



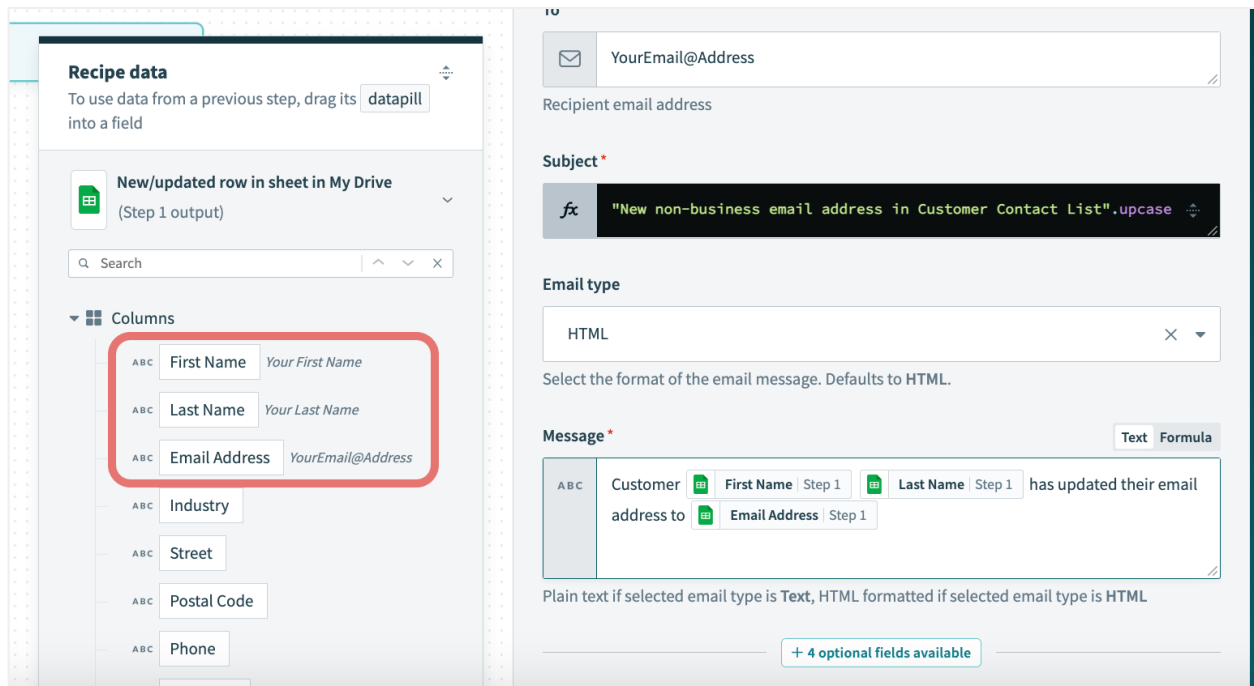


For **Message**, we're going to type out a sentence and fill in some variables using datapills.

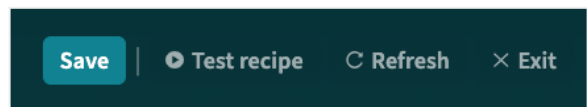
We want our message to tell us which customer changed their email address and what the new email address is.

Type **Customer** and map the **first and last name datapills** to the **message textbox**.

Continue by typing **has updated their email address to** and map the **email address datapill** to the **end of the sentence**.



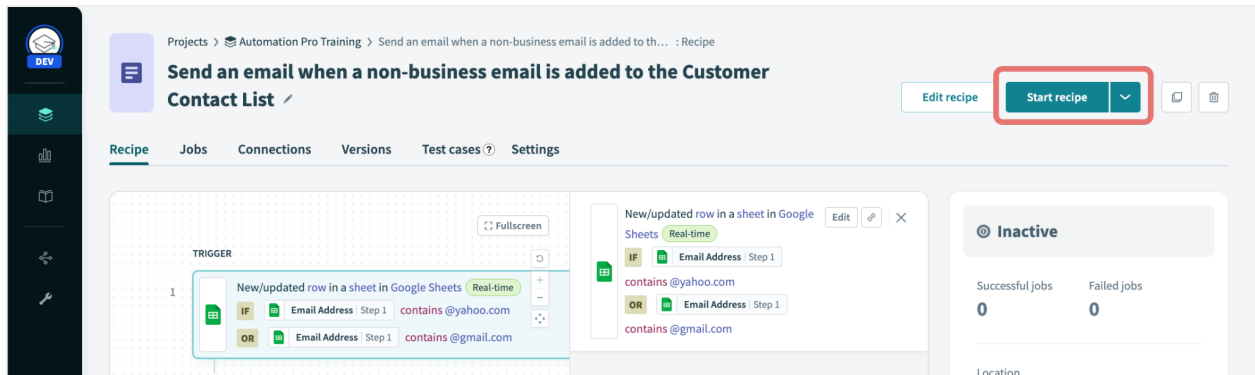
**Save** the recipe, then click **Exit**.



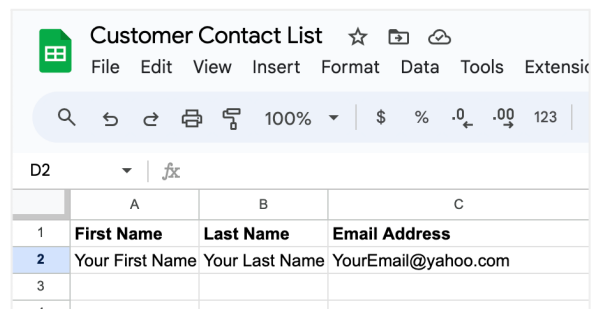
## Start the recipe and check your results

You will then be taken to the recipe information screen where you can then start the recipe.

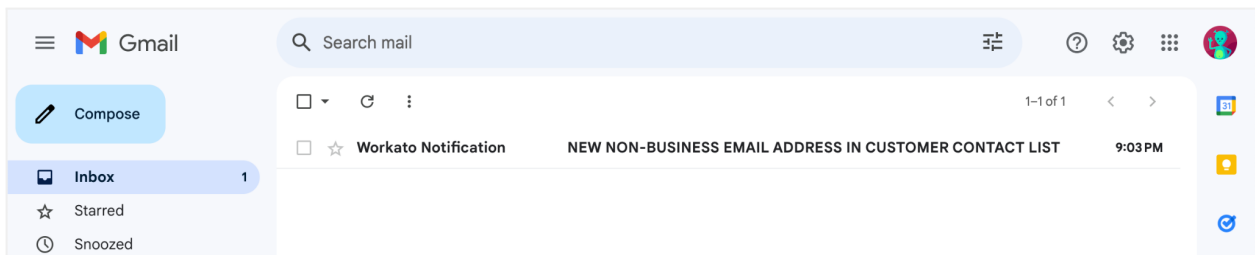
Go ahead and **start** your recipe.



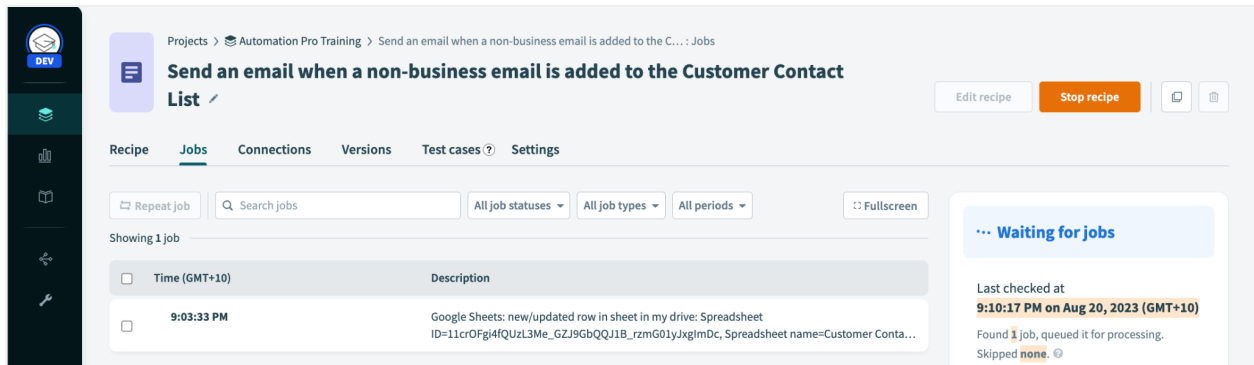
Now, in your Google Sheet, let's **change your email address** to a Yahoo or Gmail email address.



**Save** the update to your Google Sheet and open your email inbox to **wait for your notification email**.



In **Workato**, you can check for a successful job completion by going to the **Jobs** tab under recipe information.

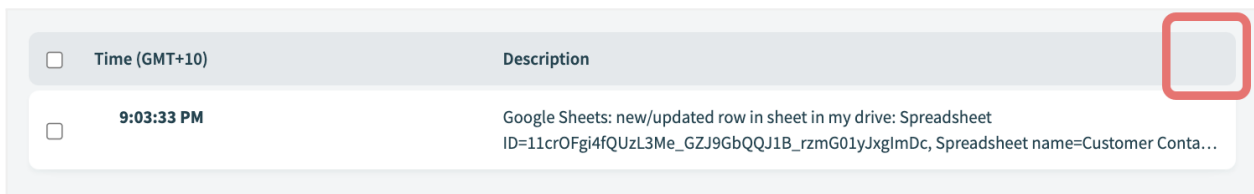


## Lab 4: Recipe information

We begin this lab in the recipe where we left off in our last recipe: reviewing the Jobs tab to see that our recipe completed successfully.

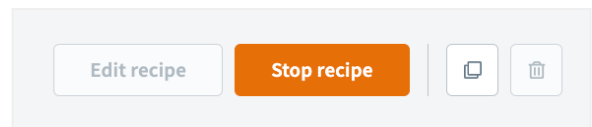
### Stop recipe and access More menu

The job report is composed of completed jobs and is customizable through the **More** icon, or three dots, at the upper right corner of the job report.

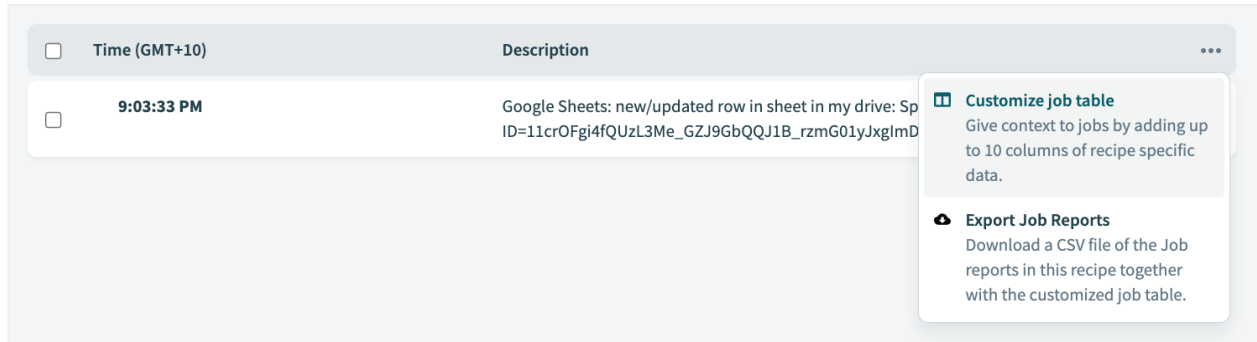


 Because the recipe is currently running, the More icon will not be available to you.

Click **Stop recipe** to reveal the **More** icon.



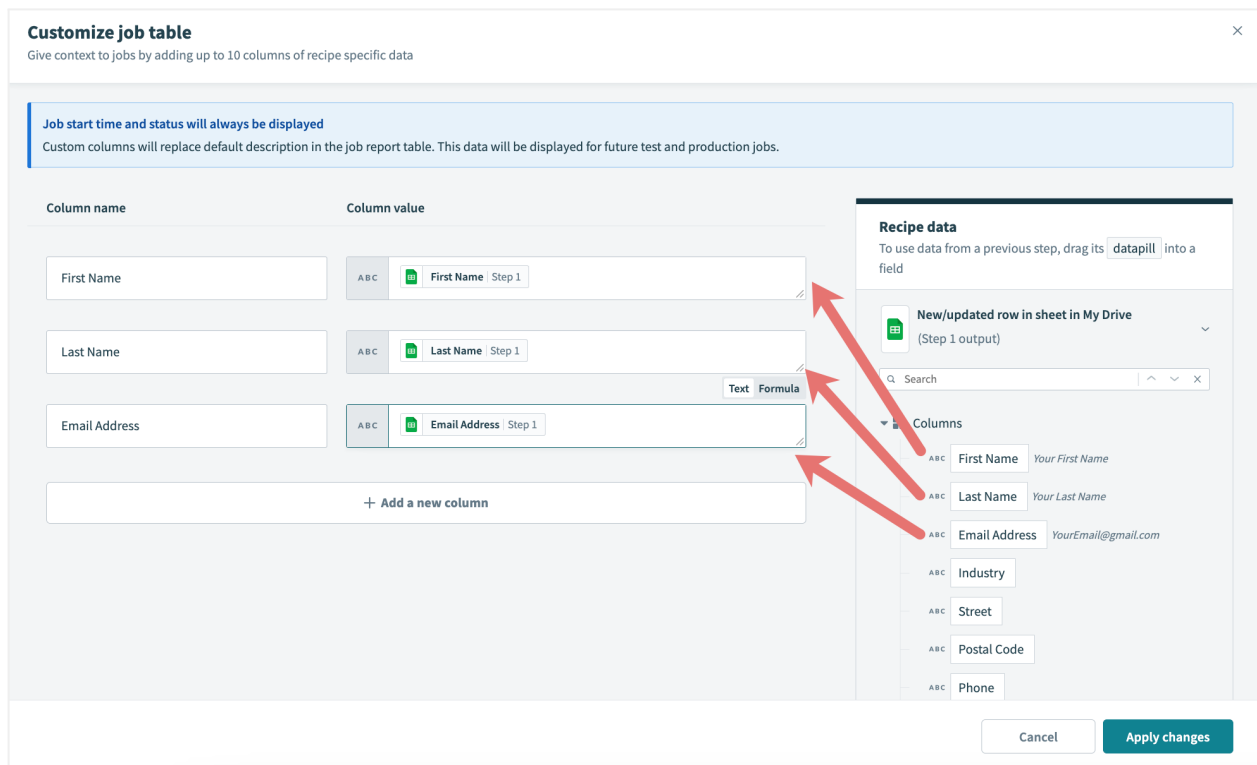
Click the **More** icon and then **Customize job table**.



## Customize job report

Because Rahl wants a record of all changes to his Google Sheet, let's **create columns** that match his sheet.

We will also map the appropriate datapill from Step 1 to each new column of the job report.



Click **Apply changes** to see your new job report.

Showing 1 job

<input type="checkbox"/>	Time (GMT+10)	First Name	Last Name	Email Address	...
<input type="checkbox"/>	9:03:33 PM				

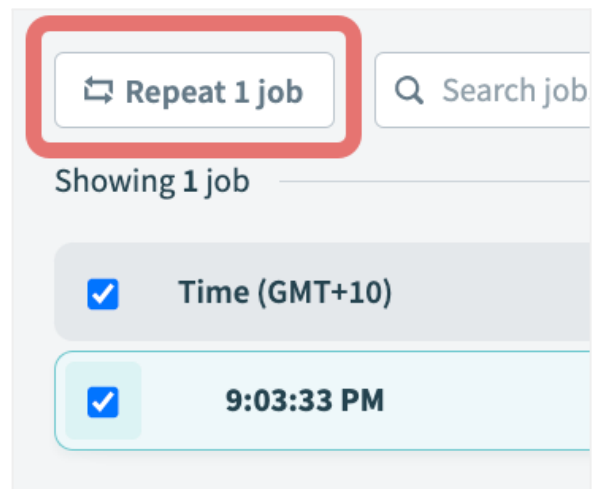
## Repeat jobs

You'll notice you now have new columns, but they are empty. You'll have to repeat your jobs to fill in your columns.

Toggle all jobs by clicking the **All** checkbox in the upper left corner of the job report.

You'll notice the grayed-out **Repeat job** button then becomes available.

Click the **Repeat job** button to populate your customized job report.



You can now **export** your customized job report and restart your recipe.

Projects > Automation Pro Training > Send an email when a non-business email is added to the C... : Jobs

### Send an email when a non-business email is added to the Customer Contact List

Edit recipe Start recipe

Recipe Jobs Connections Versions Test cases ? Settings

Repeat job Search jobs All job statuses All job types All periods Fullscreen

Showing 2 jobs

<input type="checkbox"/>	Time (GMT+10)	First Name	Last Name	Email Address	...
<input type="checkbox"/>	9:18:11 PM	Your First Name	Your Last Name	YourEmail@yahoo.com	
<input type="checkbox"/>	9:10:17 PM				

**Inactive**

When started, we'll pick up jobs from **9:12:30 PM on Aug 20, 2023 (GMT+10)**

Successful jobs: **2** Failed jobs: **0**