

Boomi Techie

Workato For Beginners

(A) Welcome to Automation Pro I



Learning Objectives

This course is organized into five sections in which we will cover:

1. Workato basics such as features, benefits, and functionality
2. Introduction to recipes: exploring the three main components of a recipe and creating your first recipe
3. Datapills and data mapping: where all the Workato magic happens
4. Recipe information, which holds key analytics and data about your automations
5. Community resources

Prerequisites

This course does not have any prerequisites. Software requirements include access to your Workato account and a Google account.

Navigation

You can navigate between lessons by pressing the Previous and Next buttons in bar below each lesson

(B) Introduction to Workato

What is the New Automation Mindset?

It is the synthesis of three major concepts into an underlying technical architecture for a robust organization ready for the future.

Throughout the Automation Pro courses, you will be challenged to:

- Adopt systems thinking and practice a Process Mindset
- Embrace challenges to become stronger through a Growth Mindset
- Engage your entire community to develop a Scale Mindset

By doing so, you'll be actualizing the New Automation Mindset for yourself and your organization



Workato at a glance

Simply said, Workato is a single digital platform for thousands of use cases. With low-code integration at its core, the Workato platform enables and empowers both business and IT teams to easily build integrations at five times the speed of typical integration platforms.

Built on a foundation of iPaaS, Workato can:

- Automate end-to-end workflows
- Deploy bots
- Leverage AI and predictive suggestions

This is achieved through pre-built connectors for over a thousand SaaS applications and over 500,000 ready-to-use recipes for common business processes.

Workato does automation faster, too

Fully cloud-native, Workato is built for scale and speed while minimizing data loss in autonomous operations. Over seventy-seven percent of Workato members go live with their first automation within one week of account setup.

Workato functionality

The Workato app offers wall-to-wall automation capabilities and services at every level of automation maturity.

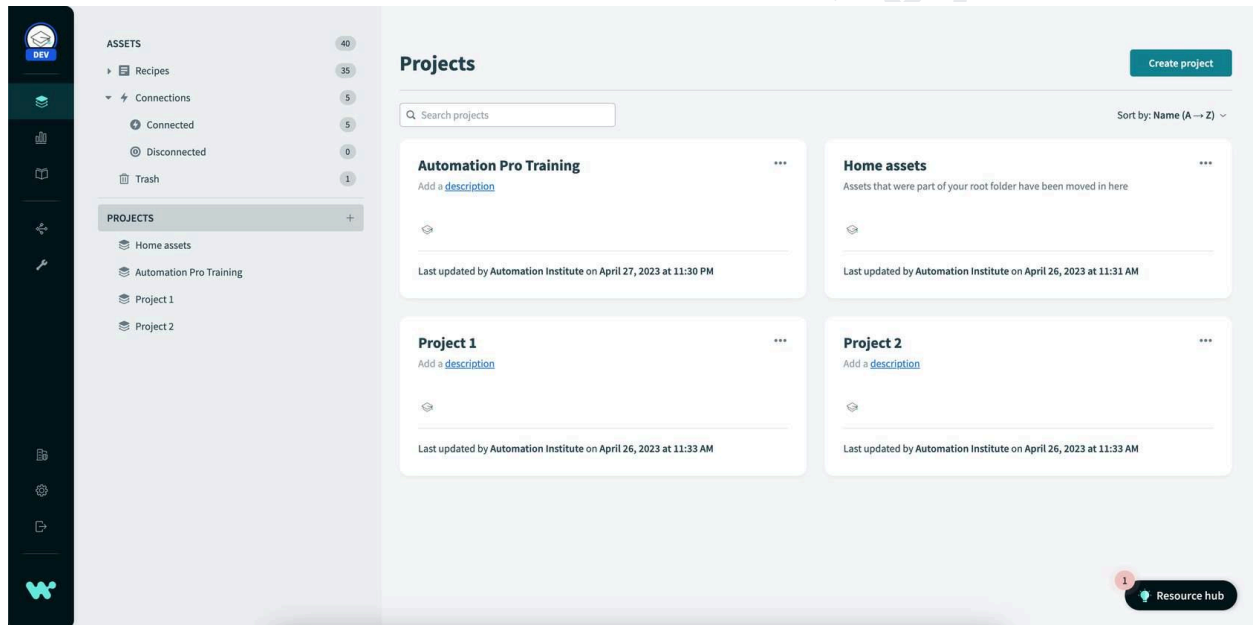
Workato core functions

Let's now take a look at Workato's core levels of functionality:

- Data syncing and integrations
- Workflow automations
- Enterprise chatbots

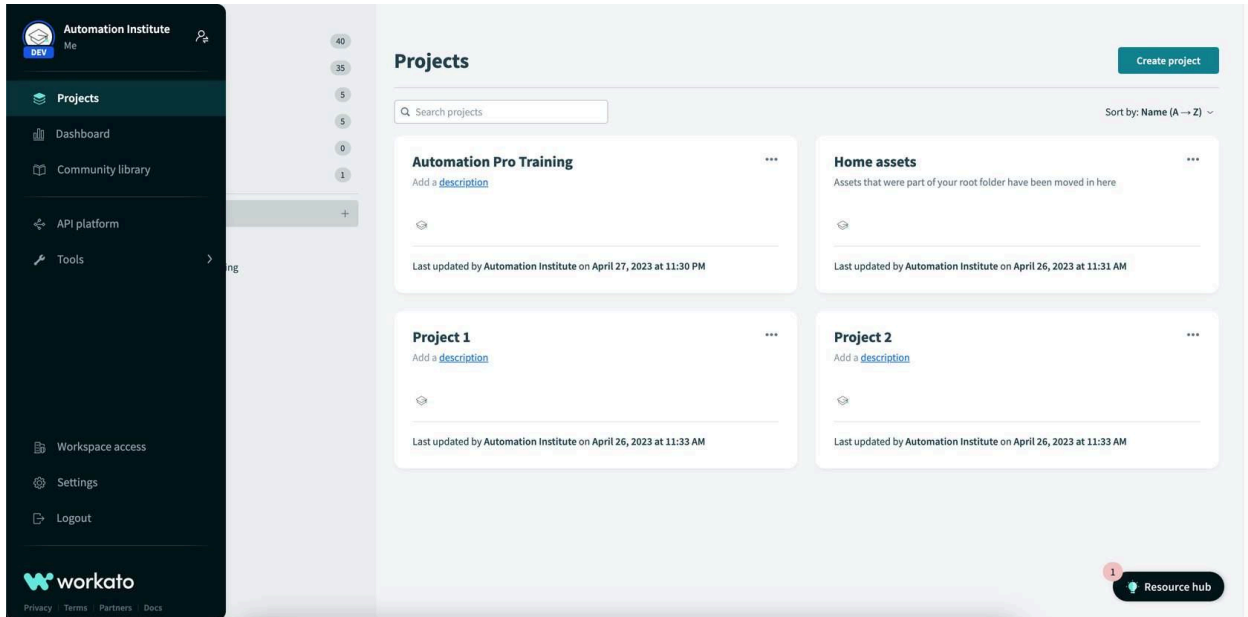
The Workato UI

When you first log in, you will likely see Workato from the **Project** view, which includes a navigation bar long the left edge and an **Assets** and **Projects** hierarchy next to the navigation bar.



If you hover over the navigation bar, you will have quick access to Projects, your Dashboard, and the Community Library. You will also have access to Settings, Tools, and advanced functionality.

Click the icons below to reveal more information about expanded menu items and the Resource hub.



Now that you have navigated through the Workato user interface, let's consider some best practices Projects within Workato. Click Next to proceed.

Projects

In both personal and professional life, we create teams and pull resources together to take on complex tasks. Managing automations is no different. Projects are a flexible way for you to bring together your team's recipes and applications in Workato and turn them into shippable automation products.

With projects, you can organize your integration assets by use case, department, app, or process, and control who has access to them.

A project can contain:

- Recipes
- Connections
- Folders and subfolders

Projects Best Practices

- Organize projects in your workspace by department, use case or project.
- Before you import a project into the target workspace, check that the target workspace has a project into which you can import the exported project.
- Admins can give users permission to create/edit/view/delete specific projects by assigning them the admin, analyst, or a custom role.
- Before deleting a project, verify assets aren't used in other projects.

Lab: Create your training project

Lab Workbook

Automation Pro 1 LAB download pdf from Boomitechie.com

Create your training project

First, log into the Workato app at https://app.workato.com/users/sign_in
(opens in a new tab)

In your Workato account, create a project and name it Automation Pro Training via either the plus (+) icon or the Create project button. It's up to you!

Quiz

Which are some major concepts of The New Automation Mindset?

Select all that apply.

- Leverage automations to implement an efficient mindset
- Embrace challenges to become stronger through a growth mindset**
- Engage your entire community to develop a scale mindset**
- Adopt systems thinking and practice a process mindset**
- Develop a winning business mindset

Feedback:

What is the New Automation Mindset? It is the synthesis of three major concepts into an underlying technical architecture for a robust organization ready for the future.

- Adopt systems thinking and practice a Process Mindset
- Embrace challenges to become stronger through a Growth Mindset
- Engage your entire community to develop a Scale Mindset

Which of the following makes it easier to store, organize, and retrieve recipes as needed?

- Workato dashboard
- Projects**
- Job report
- Community library

Feedback:

We recommend, as a best practice, organizing recipes into projects in your workspace. For example, you could organize assets by department, use case, or project.

(C) Recipe Components

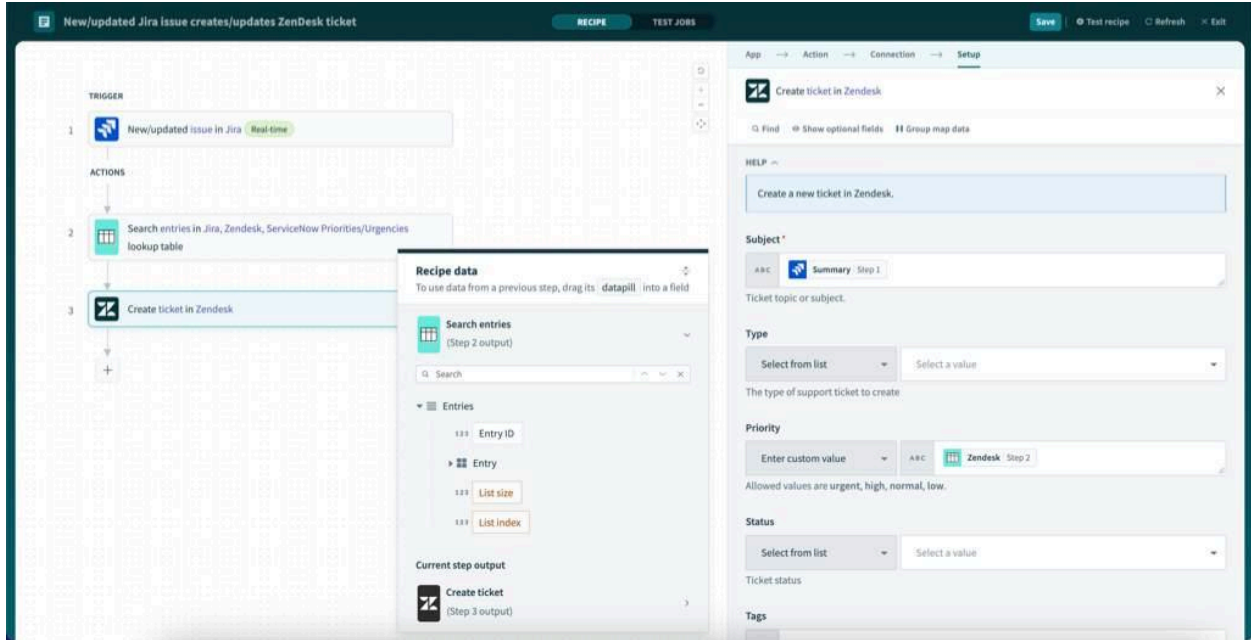
Main recipe components

There are three main components of a recipe:

- An application connection, for each external application you need it to communicate with
- A trigger, to determine when your recipe will be executed
- Steps, to determine what actions your recipe will perform

Recipe Editor

The Workato recipe editor is the powerhouse of the Workato platform and the main area of focus throughout this course



Application connections

When you start building a recipe, the first step is establishing a connection between Workato and an app.

Each connection is associated with one instance of the app, such as a user account, and can be reused across recipes

Connecting to applications

There are two ways to create application connections in Workato. Let's examine the value of each method.

Method 1: Connect using the connection wizard

During recipe planning and design, you may find that one application connection could be used across multiple recipes. In this instance, we recommend creating an application connection by utilizing the connection wizard

Method 2: Connect during recipe creation

The second way to create an application connection is during recipe creation. This method is especially helpful when you need to connect to multiple applications in one recipe.

Triggers

Introduction to triggers

Triggers are an essential component of recipes as they determine which event or events must be monitored in order to execute the actions described in a recipe.

Depending on the trigger type, events can be set off:

- In apps, such as Salesforce or Jira, when a certain event happens, for example, a new contact is created or an existing ticket is updated
- When new content is added to a file
- According to a schedule, at a certain time or at certain intervals
- In real-time, depending on available APIs

Trigger types

Triggers can be classified into different types based on when they check for new events (**trigger mechanism**), how they group new events (**trigger dispatch**), and how the recipe will be initiated (**trigger event type**).

Trigger conditions

Depending on your needs, you may also choose to set up trigger conditions or trigger filters, which will allow you to reduce the records process based on certain criteria

There are 14 types of trigger conditions and each condition has different requirements, especially in terms of data type validity. If the condition is used for invalid data types, it might prevent the recipe from starting successfully..

CONTAINS	STARTS WITH	ENDS WITH	EQUALS	GREATER THAN	IS TRUE	IS PRESENT
DOESN'T CONTAIN	DOESN'T START WITH	DOESN'T END WITH	DOES NOT EQUAL	LESS THAN	IS NOT TRUE	IS NOT PRESENT

Steps

Now let's look at another essential building block of a recipe: steps. Recipe steps can be actions or control flow statements that help you describe business logic.

The following step types are available in Workato app:

- Actions in an app
- IF condition
- IF/ELSE condition
- Repeat step
- Call Recipe Functions step
- Stop step
- Handle Errors step

Adding steps to a recipe is straightforward in Workato. After setting up a trigger, click the plus sign to choose from different action options, including Action in an app, IF and IF/ELSE conditions, Repeat action, Call recipe, Stop job, and Handle Errors.

Lab prep

Google account access

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.

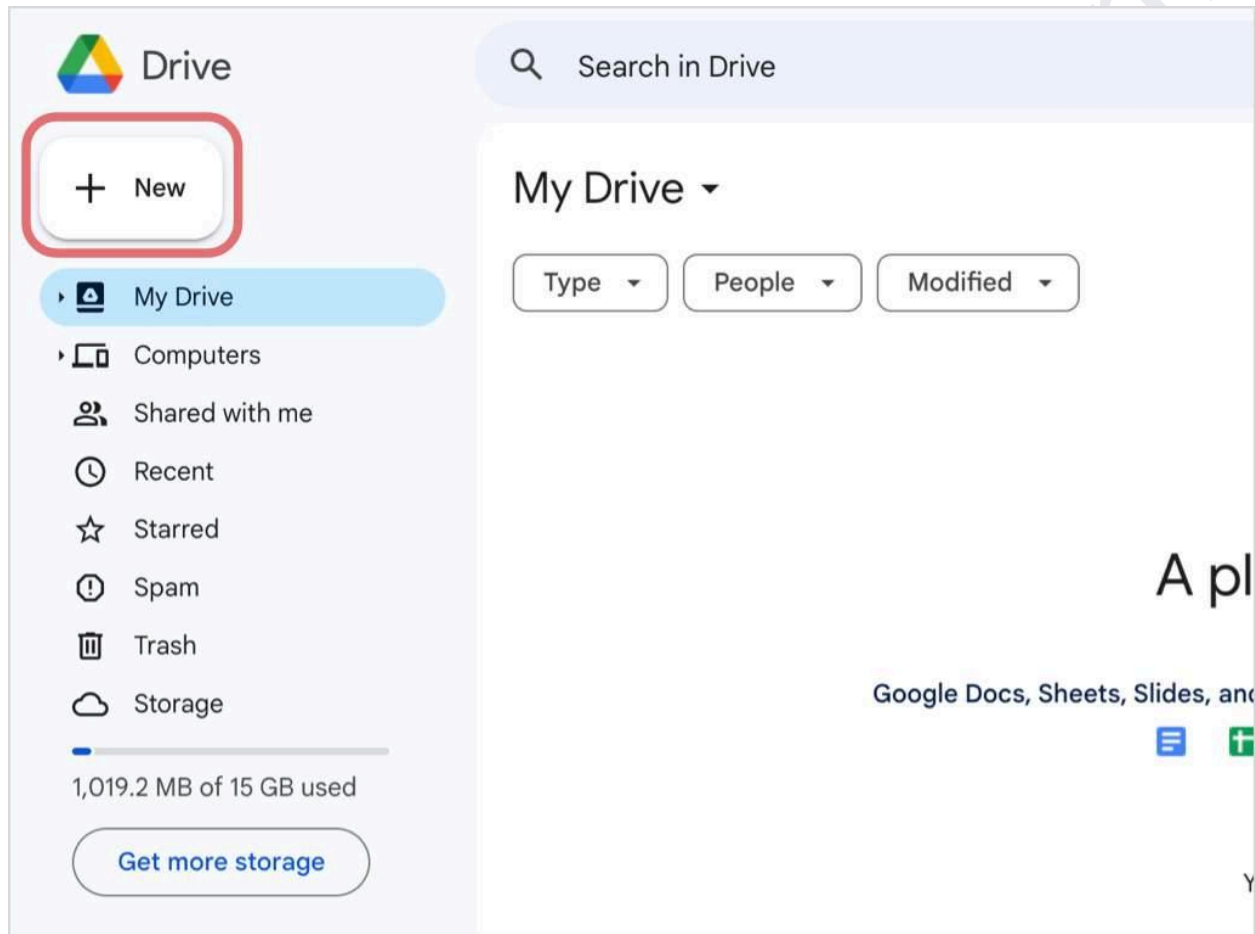
If you are unable to receive sandbox access to a Google account through your organization, you can create one for free at the Google Account sign in page: <https://accounts.google.com/signin>(opens in a new tab).

Google Sheets file

Follow the steps below to create and setup a Google Sheets file for use in lab activities for this course.

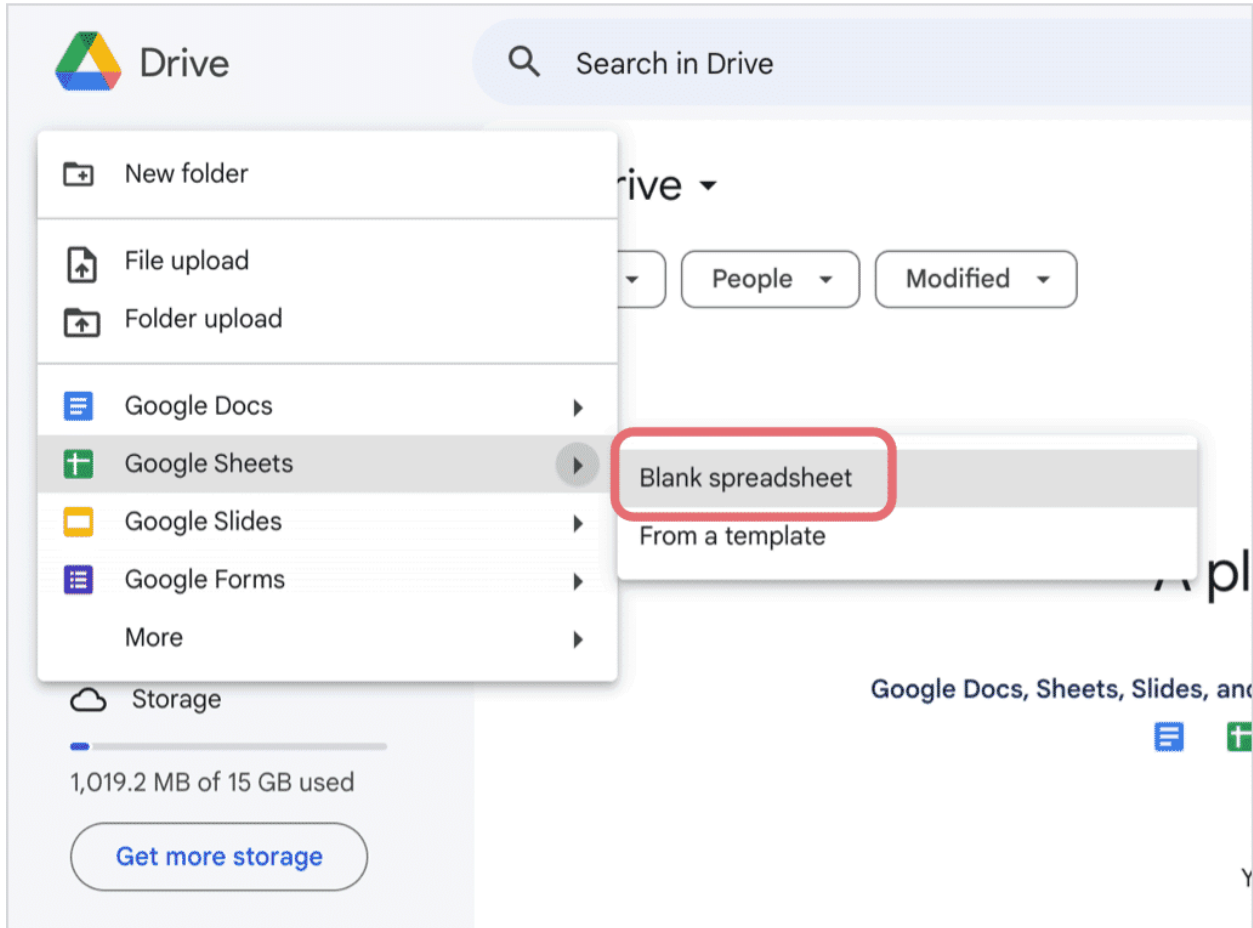
Step 1:

In Google Drive(opens in a new tab), [click the New button.](#)



Step 2:

Choose Blank spreadsheet under [Google Sheets.](#)



Step 3:

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

First Name
Last Name
Email Address

	A	B	C	D	E
1	First Name	Last Name	Email Address		
2					
3					
4					
5					
6					

Lab: Create your first recipe

Lab competencies

In this lab, you will complete the following competencies:

- Choose and schedule a trigger
- Connect to an app
- Navigate recipe builder
- Add a step: action in an app
- Test recipe

Project video

What are two methods for creating connections to applications? Select all that apply.

Using the connection wizard

During project creation

Using the job report

During recipe creation

Feedback:

There are two ways to create application connections in Workato:

- Using the connection wizard

- During recipe creation

WWW.

Which type of trigger allows you to determine when exactly your recipe will run?

- Polling
- Scheduler
- Batch
- Logger

Feedback:

The Scheduler trigger type allows you to determine when exactly your recipe will run.

(D) What is recipe design?

When designing a recipe, or a more complex automation project you want to get the most value out of your automations by building them to last. By applying recipe design principles, you can create automations that are organized, readable, and reusable.

When you're automating a critical business process, you want it not just to work today. You also want it to be stable over time, able to grow with your needs, and simple to maintain.

Let's take a look at more aspects of recipe design.

Recipe design worksheet

Download [workato recipe design worksheet PDF](#) from www.boomitechie.com

Data mapping

Datamapping in Workato is achieved through the use of datapills.

Datapills are output data from a trigger or an action step. They are variables that you can use to map business logic into recipe steps. For example, to create a Zendesk organization from a Salesforce account, you will assign datapills from the Salesforce account to the Zendesk organization in the recipe actions.

Recipe data

Datapills are contained within the datatree, within the App Data section. At any particular recipe step, the App Data section contains the output from the trigger and every action preceding this step.

In a previous lesson, we explored the recipe editor. Now, let's take a closer look at the recipe data area of the recipe editor.

Summary

- Datapills are output data from a trigger or an action step. They are variables that you can use to map business logic into recipe steps. Datapills are contained within the datatree, within the App Data section.
- Integrating applications will often involve mapping data from a source application to a destination application.
- Steps contain datapills, which contain the data, or value, associated with each field in the source application and object. The value is dynamic in nature, and thus can change with every automation job run.
- There are a variety of data types, including string or text, integer, float (which contains a decimal point), object, date, date time, boolean (true-false), and array (list). And each data type is represented by a different icon in the Workato platform.

Formulas

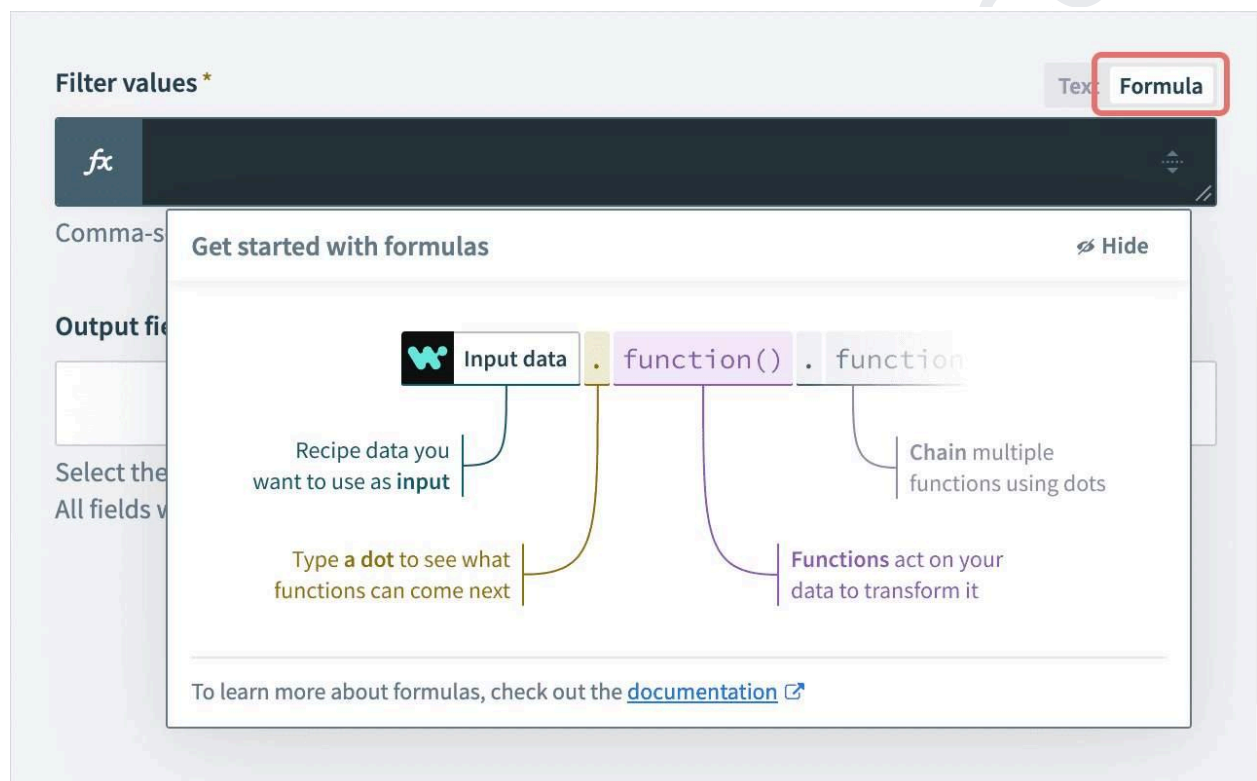
With formulas, you can easily work with and format data. Formulas in Workato are included in allowlists of Ruby methods. Though not all Ruby methods are supported, you can reach out to us to add additional formulas to the allowlist. Syntax and functionality for these formulas are generally unchanged from Ruby methods.

Workato allows you to work with the following standard data types:

- String
- Integer or number
- Date or datetime
- Array/hash (list)

Switching to formula mode

To start using formulas, you need to be in formula mode. Formula mode needs to be switched on at the field level, and most input fields support formula mode.



When the input field is toggled into formula mode, the string type input field changes icon from String type to formulas type.

In formula mode, the formula editor provides a set of formulas that are on the allowlist and available for data transformation/manipulation, and provides additional help on how to use these formulas.

Download [Workato Common Formulas PDF](http://www.boomitechie.com) from www.boomitechie.com

Recipe testing

Another key part of recipe design is recipe testing. Testing ensures your automation's behavior and data processing are correct - you don't want to do a lot of cleanup later! Workato's integrated recipe testing environment allows you to test your recipe before starting it.

Inside the recipe editor, click the Test button to run a single trigger event through the recipe logic. This will continuously run until one job is completed. This lets you review job details and check for recipe errors.

Is your recipe test-ready?

Running a test job requires:

- A fully configured trigger
- Valid data mappings
- Valid connections

Workato will check that your recipe meets these requirements when you click Test. If there's an issue, you'll be prompted to address it.

Successful jobs

Successful jobs include the recipe path, input, and output.

The screenshot displays the Workato recipe editor interface. On the left, the recipe flow is shown with four steps:

1. TRIGGER: Trigger on a specified schedule
2. ACTIONS: Search for Users in Salesforce
3. ACTIONS: IF Active Step 2 is not true (Yes/No branches)
4. ACTIONS: Post message in Slack (connected to the 'No' branch of the IF step)

On the right, the 'Output' tab is active, showing the JSON output of the job:

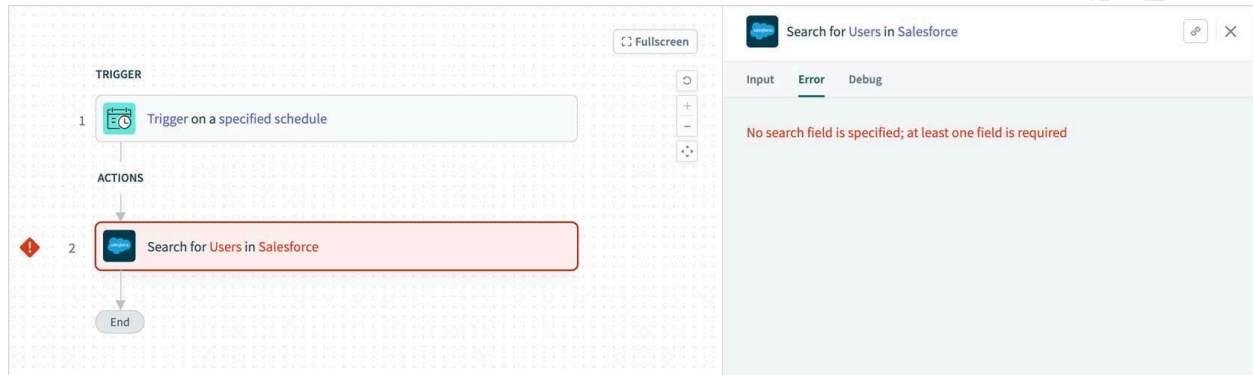
```
1 {  
2   Scheduled time: "2023-07-24T18:56:48.308936+10:00",  
3   Scheduled day: "Monday",  
4   Scheduled week: 30,  
5   Scheduled month: "July",  
6   Last job time: "2023-07-24T18:45:45.000000+10:00"  
7 }
```

Failed jobs

Failed jobs include the recipe path, input, output, and debugging information.

Additionally, Workato will highlight the step at which the error occurred. Click the highlighted step to view details about the issue, including a description of the error.

Fix the errors in build mode before repeating the job or running a new test.



If your recipe is working well and you want to run it, exit the job report and click the Start Recipe button. This allows the recipe to pick up all trigger events and will continue to listen for trigger events unless explicitly stopped.

Click the Stop Recipe button to stop processing new trigger events.

Summary

Testing ensures your automation's behavior and data processing are correct.

Running a test job requires a fully configured trigger, valid data mappings, and valid connections.

Inside the recipe editor, click the Test button to run a single trigger event through the recipe logic.

Successful jobs include the recipe path, input, and output. Failed jobs include the recipe path, input, output, and debugging information.

Lab: Map datapills and modify data

Lab competencies

In this lab, you will complete the following competencies:

- Set trigger conditions
- Navigate and search datatree
- Use datapills to map data
- Use formula mode to modify data
- Save and start recipe

Quiz

Which are some first steps in recipe design?

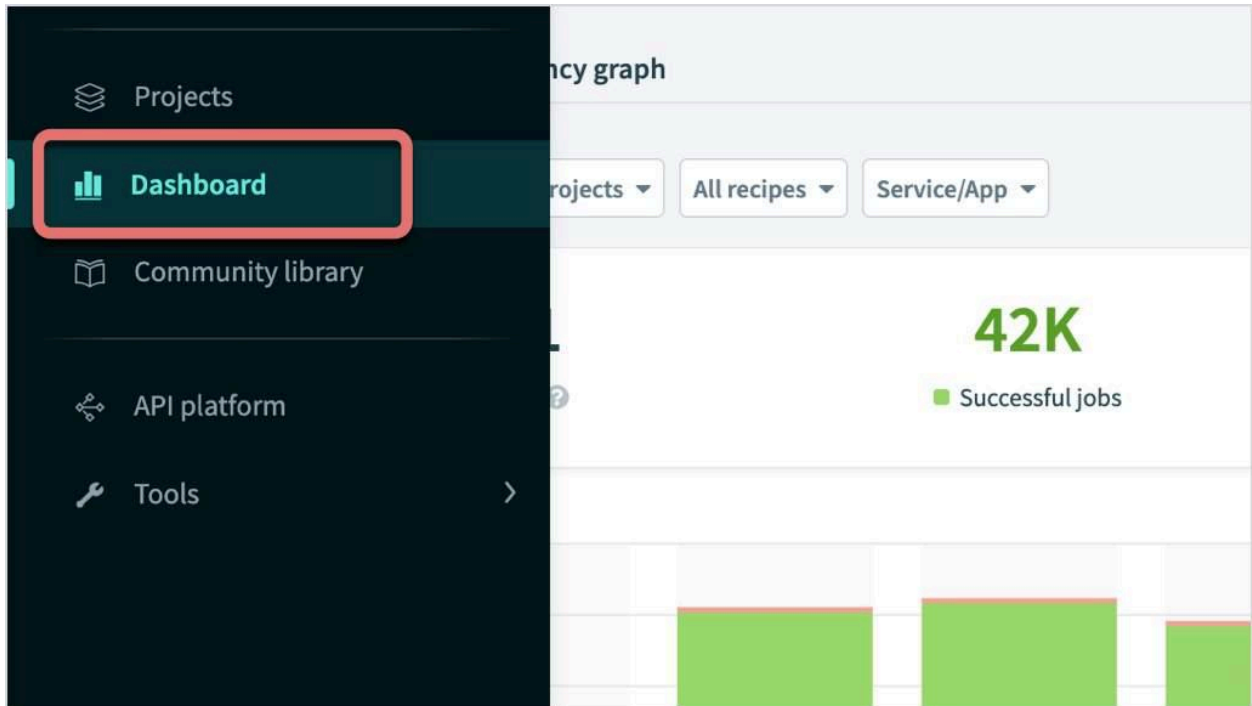
Select all that apply.

- Customize your job report
- Map out the workflow automation**
- Switch to formula mode
- Ensure access to applications and data required during workflow**

Testing a recipe is different than starting a recipe in that _____.

- A test does not require any active connections to run.
- A test will only process one job then stop.**
- A test will run using only fictitious data.
- Starting a recipe requires at least one test to be run.

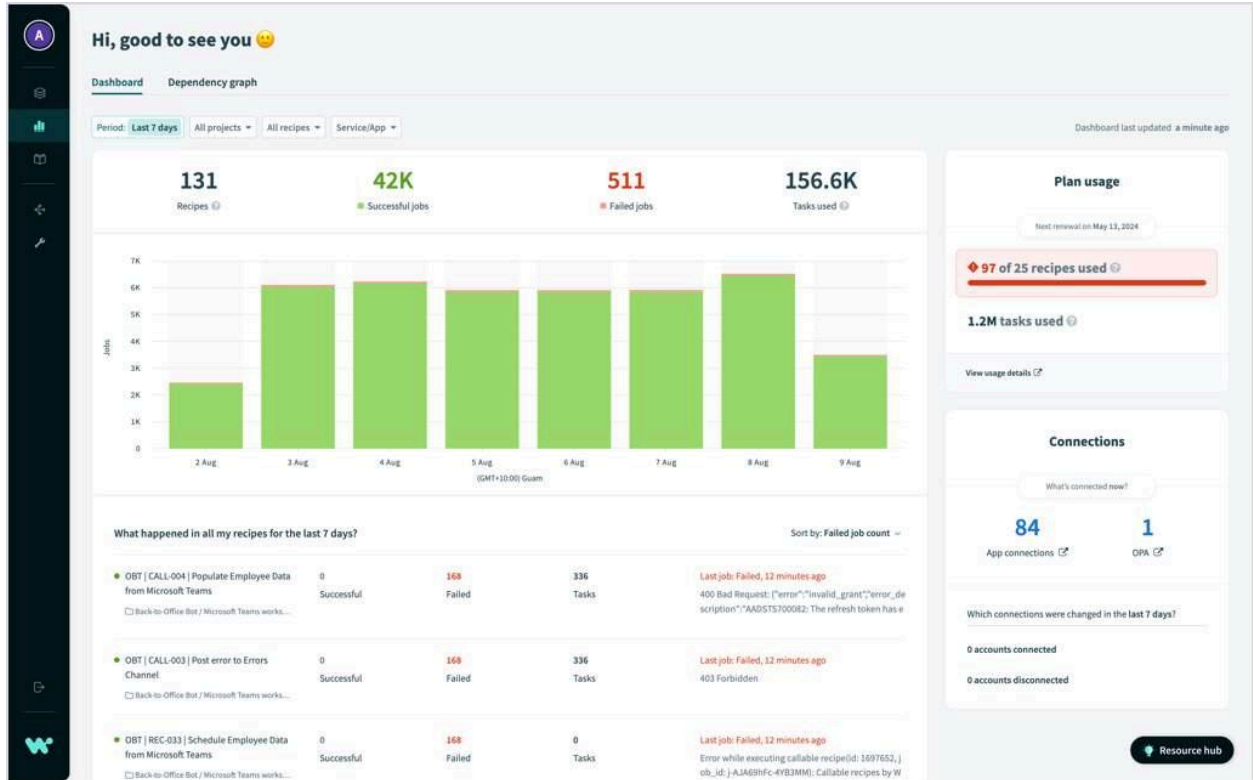
(E) Workato dashboard



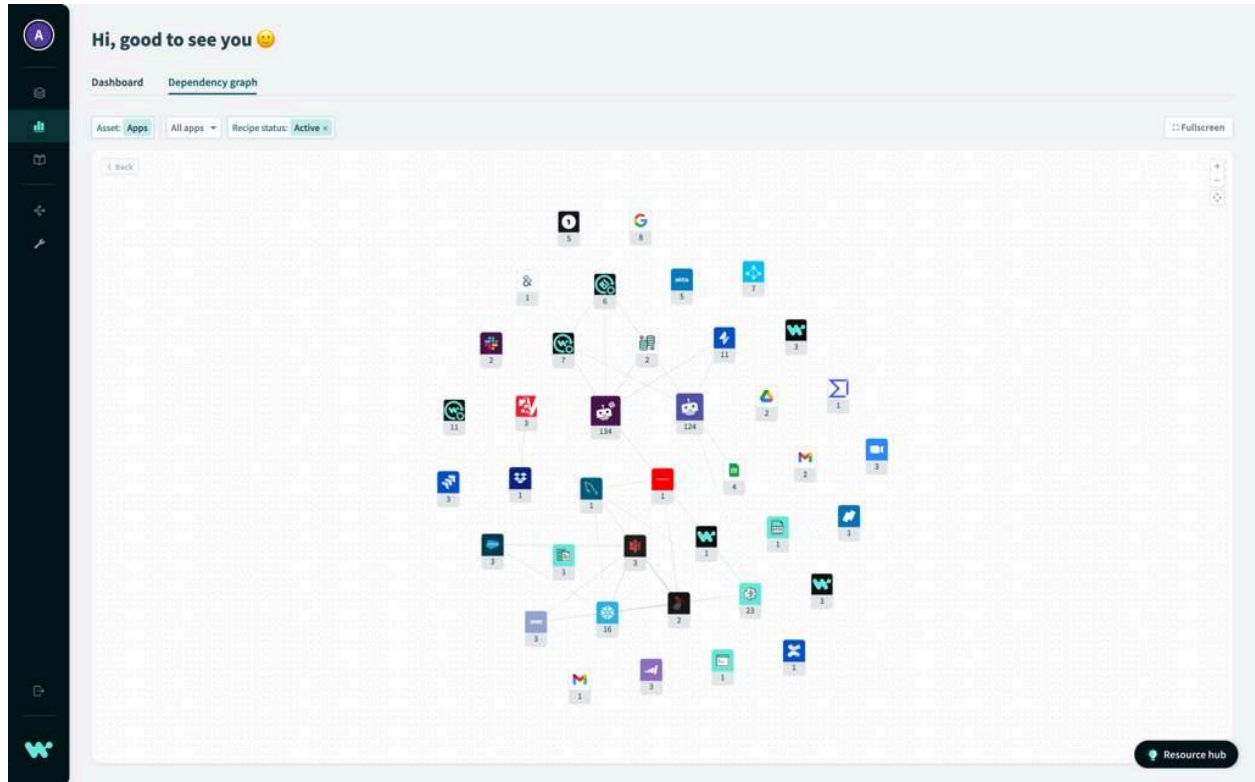
In the dashboard, you can see trends across time and find outliers that directly impact your businesses.

Additionally, you can obtain a snapshot of the account's recipe issues and tackle them more efficiently.

There are three main parts to the Dashboard tab. Click the icons below to learn more.



On the Dependency graph tab, you can use filters to select a starting point and see how recipe assets are related to each other.



Recipe details and versions

Recipe details tab

When viewing a recipe, the main Recipe tab gives at-a-glance information and access to basic recipe information. Here, you can see recipe workflow, status, location, and links to dependencies, such as connections. You can also see successful and failed jobs.

Click the icons below for more features in the recipe details tab.

The screenshot displays the Salesforce Automation Studio interface for a recipe titled "New/updated cases in Salesforce will create or update issues in Jira". The recipe is currently inactive. The flowchart consists of the following steps:

- TRIGGER:** 1. New/updated Case in Salesforce
- ACTIONS:**
 - 2. MONITOR: the following actions for error
 - 3. Search issues in Jira
 - 4. IF: List size Step 3 equals 0
 - Yes: 5. Create issue in Jira
 - No: 6. IF: List size Step 3 equals 1
 - Yes: 7. Update issue in Jira
 - No: (Action not visible)

On the right side, the recipe status is shown as "Inactive" with 3 successful jobs and 0 failed jobs. It was stopped on Jul 13 at 3:22 PM. The latest activity log shows:

- Copied by Automation Institute (Jul 24 at 5:25 PM)
- Edited by Automation Institute (Jul 18 at 5:01 PM)
- Stopped by Automation Institute (Jul 13 at 3:22 PM)

Recipe versions tab

If the recipe is edited and saved, the recipe will increment to a new version. These versions are accessible via the recipe versions tab of your recipe details.

Projects > Project 1 > New/updated cases in Salesforce will create or update issues in Jira / Versions

New/updated cases in Salesforce will create or update issues in Jira

Recipe Jobs Connections **Versions** Test cases Settings

Compare versions Search version comments All periods All change types All collaborators

Showing 5 versions

Version	Created on	Change type	Modified by	Comments
5 Current	7/18/23 5:01 PM	Schema change	Automation Institute	Add comment
4	4/27/23 11:30 PM	Recipe change	Automation Institute	Add comment
3	4/27/23 10:53 PM	Recipe change	Automation Institute	Add comment
2	4/27/23 10:41 PM	Recipe change	Automation Institute	Add comment
1	4/27/23 10:19 PM	Recipe change	Automation Institute	Add comment

Resource hub

You can see the details of all versions, including the time in which the version was created, the change type as well as the person who modified the recipe. You can also preview and restore a previous version of your recipe at any time. We recommend adding a comment when you create a new recipe version, for good version control and management.

Types of recipe changes

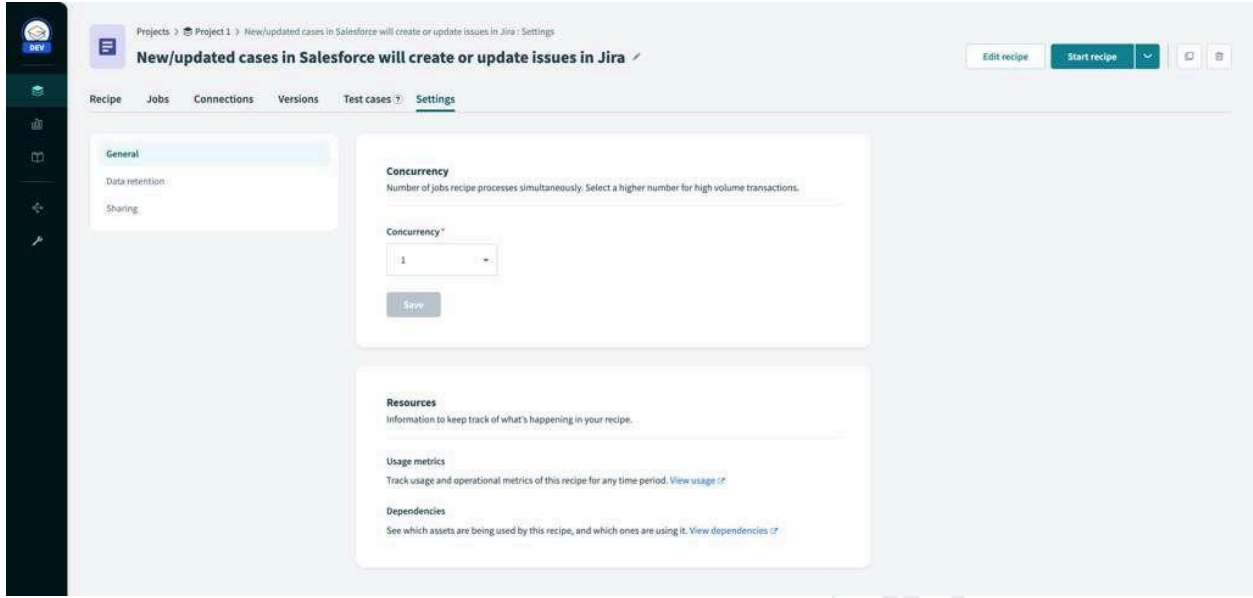
There are two main types of recipe changes. Schema changes are driven by Workato when the schema of objects change while logic changes are driven by users actively changing the logic of the recipe.

Recipe settings

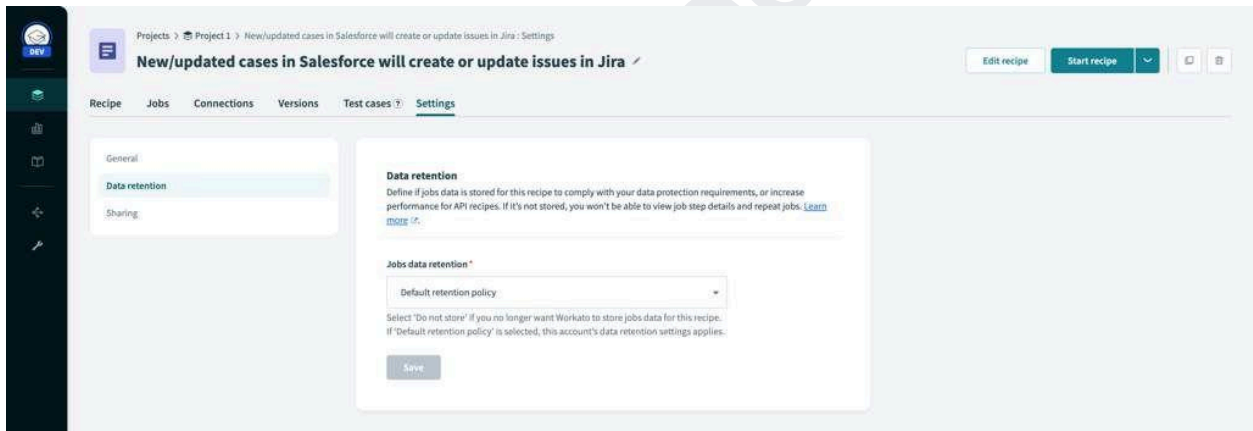
The Settings tab is categorized into three parts: General, Data Retention, and Sharing.

Under General settings, you can choose the concurrency number depending on the number of jobs the recipe processes simultaneously. You can also select a higher number for high-volume transactions.

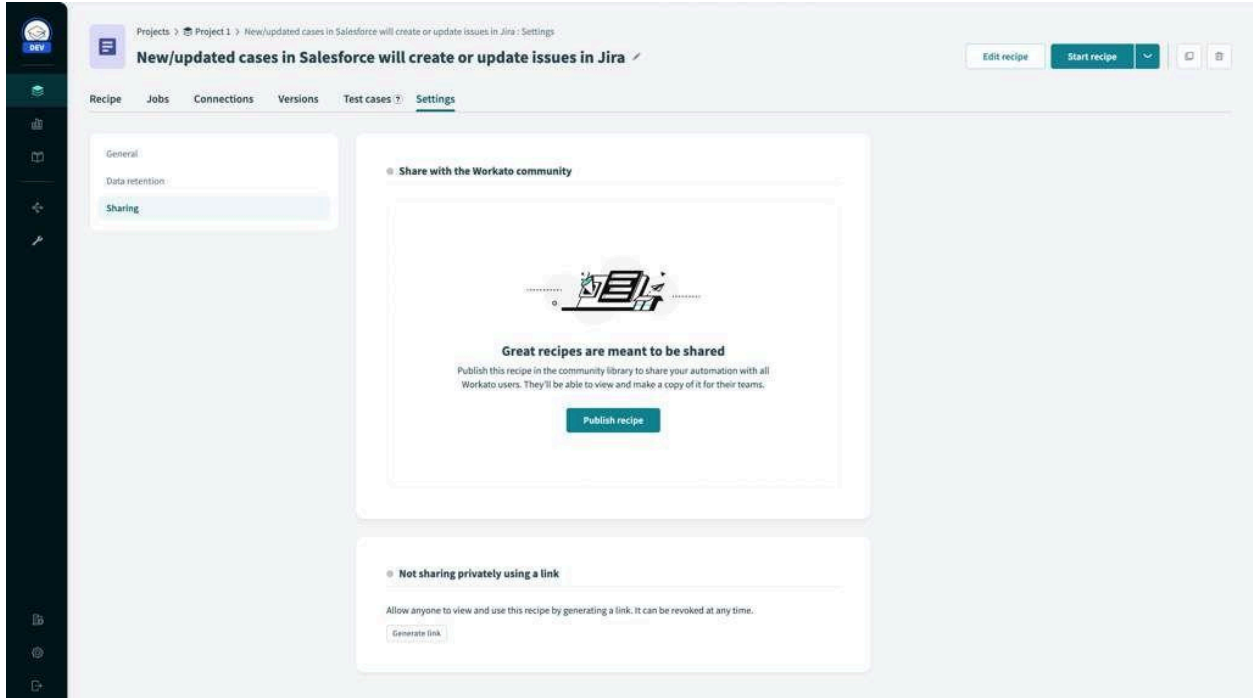
Below, additional resources are available that link to usage metrics and dependencies.



Under Data Retention, you can set a data retention policy as instructed by your organization or team.



Under Sharing settings, you can list your recipe in the Workato Community Library. We'll explore the Workato Community Library later in this course.



Jobs and job reports

When an active recipe processes a trigger event and runs the sequence of actions, as defined in the recipe logic, it creates a job. Each job holds a unique trigger event and executes its recipe logic based on that data. Workato provides details into this execution flow of a job, such as the steps that were executed and the input and output data from every step.

The job report of all processed jobs can be customized to display useful information and will retain data for a duration corresponding with your data retention policy.

To access a recipe's job report, select the Jobs tab when looking at recipe details. Here, you will see a list of all processed jobs for your recipe. From here, you can also rerun individual jobs or batch rerun multiple jobs.

Projects > Project 2 > Send Slack message: list of inactive users: Jobs

Send Slack message: list of inactive users

Recipe Jobs Connections Versions Test cases Settings

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

Showing 4 jobs

Time (GMT+10)	Description
6:56:48 PM, Jul 24	Scheduler by Workato: new recurring event: Scheduled time=2023-07-24T18:56:48.308936+10:00, Scheduled day=Monday, and Scheduled week=30
6:45:46 PM, Jul 24	Scheduler by Workato: new recurring event: Scheduled time=2023-07-24T18:45:45.896026+10:00, Scheduled day=Monday, and Scheduled week=30
6:45:09 PM, Jul 24	Scheduler by Workato: new recurring event: Scheduled time=2023-07-24T18:45:09.336898+10:00, Scheduled day=Monday, and Scheduled week=30
6:44:03 PM, Jul 24	Scheduler by Workato: new recurring event: Scheduled time=2023-07-24T18:44:03.706064+10:00, Scheduled day=Monday, and Scheduled week=30

Inactive

When started, we'll pick up jobs from **6:56:49 PM on Jul 24, 2023 (GMT+10)**

Successful jobs: 3 Failed jobs: 1

Activity in the last 7 days
View dashboard

No data to show

2 Aug 4 Aug 6 Aug 8 Aug

Select a job to view complete job details, such as job ID, recipe version, status, and the date and time the job was processed. You can also see complete details of the execution flow which includes the data input and output from every step.

Projects > Project 2 > Send Slack message: list of inactive users: Jobs > 6:56:48 PM, Jul 24

6:56:48 PM, Jul 24

Started at 6:56:48 PM on Jul 24, 2023 (GMT+10) using recipe Version 7

Repeat this job Edit recipe

Repeats and edits always use the latest recipe version

Successful

Job ID: j-AHTm4HeD-enWooC

Description: Scheduler by Workato: new recurring event: Scheduled time=2023-07-24T18:56:48.308936+10:00, Scheduled day=Monday, and Scheduled week=30

Duration: 448ms

Tasks used: 2

```

graph TD
    TRIGGER[1 Trigger on a specified schedule] --> ACTION1[2 Search for Users in Salesforce]
    ACTION1 --> IF[3 IF Active Step 2 is not true]
    IF -- Yes --> END((End))
    IF -- No --> ACTION2[4 Post message in Slack]
    ACTION2 --> END
  
```

Repeating jobs

Workato also supports the repeating of jobs, in cases whereby an error stops a job from full completion. Any job completed or failed can be rerun.

Workato stores the data of the trigger event, and repeating the job will run on the latest recipe version. The job history thus only shows the last iteration through a loop. It therefore does not pick up new trigger events.

Customizable job report

The job report can be customized to display meaningful data so you can better understand your jobs at a glance.

By clicking the More icon on the job report page, you are able to customize the job report to display any app data from your recipe.

You may add up to a maximum of 10 columns.

NOTE: You can only customize the job report when the recipe is not active.

Lab: Customize your job report

Lab competencies

In this lab, you will complete the following lab competencies:

- Navigate recipe details
-
- View a job
-
- View and customize a job report
-
- Repeat a job

QUIZ

When an active recipe processes a trigger event, it results in a(n) _____ .

- Report
- Error
- Job**
- Action

Which of the following is a record of all processed jobs where you can view the complete details for each processed job?

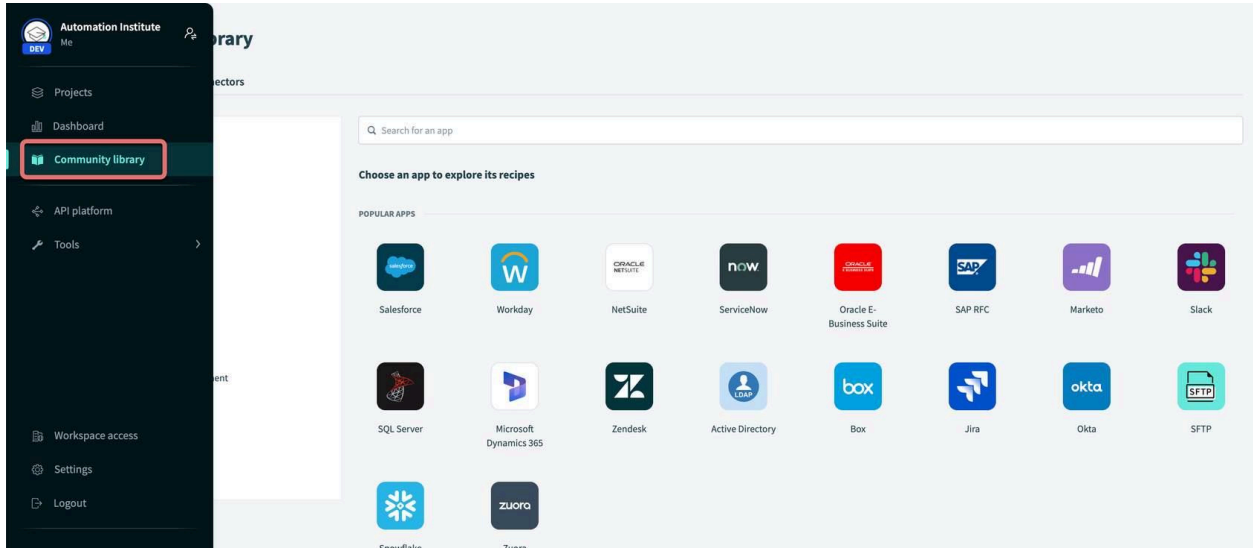
- Recipe
- Action report
- Account settings
- Job report**

Community library

Now that you have a basic understanding of recipes and recipe design in Workato, we encourage you to explore the Workato Community Library for inspiration and ideas for your solutions.

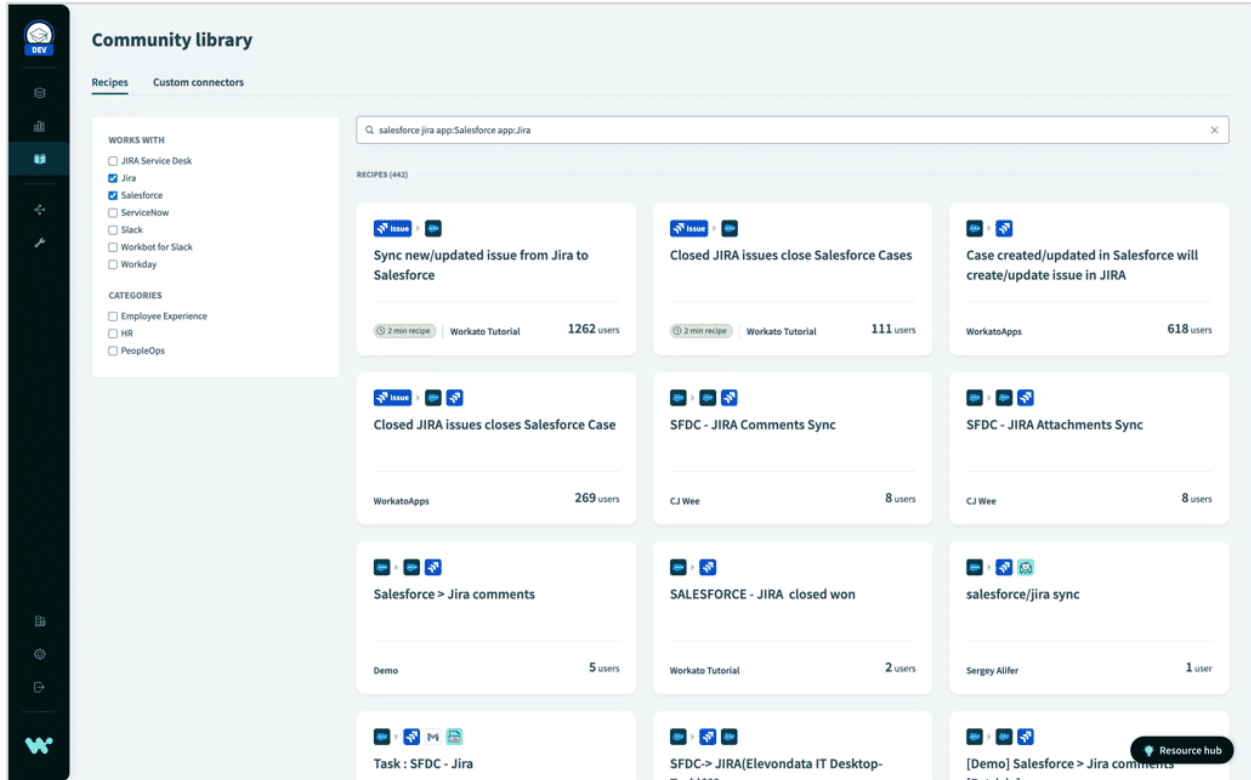
The [Workato Community Library](#) contains integrations and workflow automations built by the Workato community. Find, clone, and personalize them to your specific needs.

To access publicly-shared recipes on the platform, click Community Library in the navigation bar.



You can search for recipes by clicking on the icon of the application or by typing the name of one or more applications.

For example, if you search for Salesforce and Jira, you will see all the community recipes involving Salesforce and Jira that have been created by the Workato community.



In addition you may also search by keywords, such as "sync employees," to access the relevant recipes involving the syncing of employees.

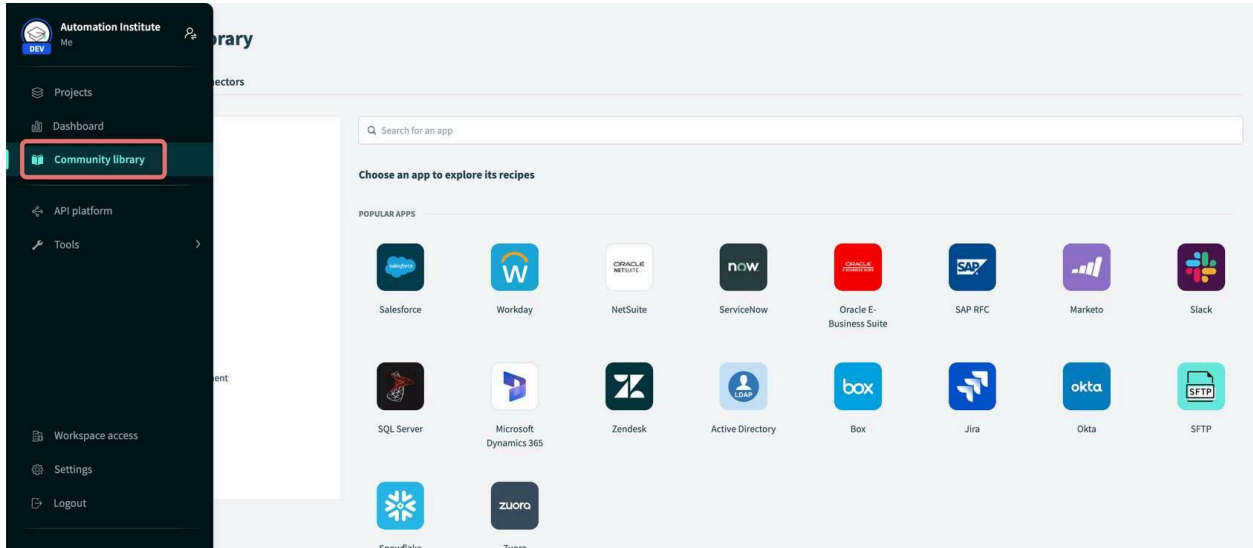
To use a community recipe in the Community Library, view the recipe and click Use this recipe to copy the recipe to your workspace and configure it to your business requirements.

Lab: Find and clone a recipe from the community library

Navigate to the Workato community library

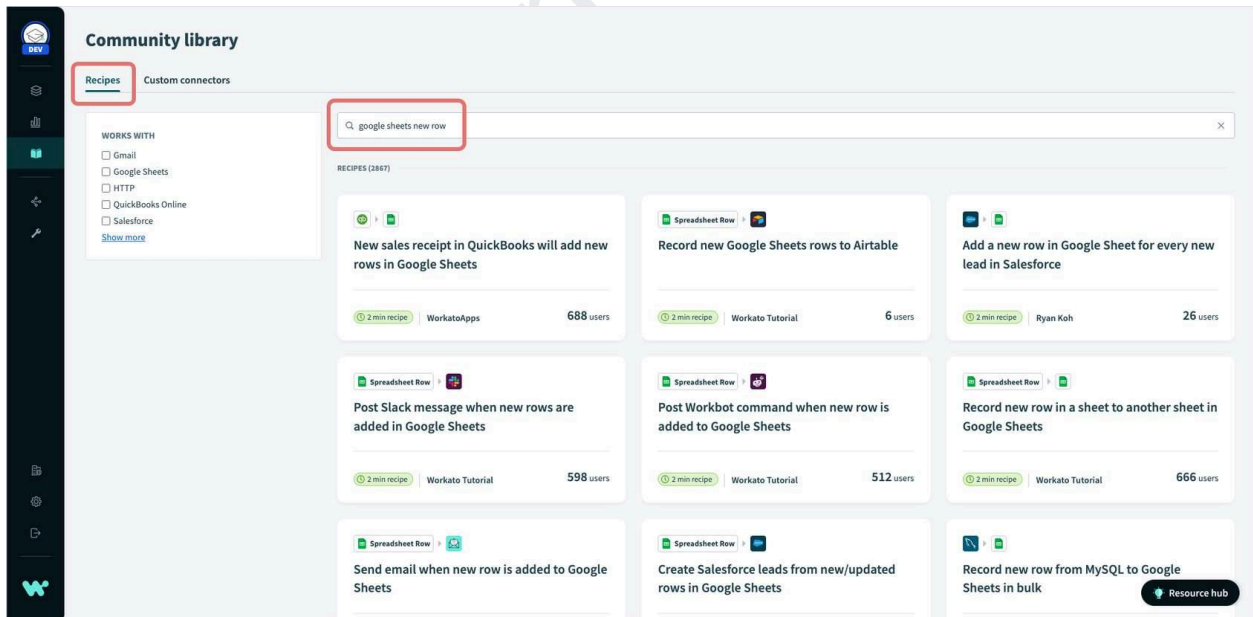
In the previous lesson, you learned you can navigate to the Workato community library through the app. Let's review how to do that now.

In your Workato app, hover over the navigation bar along the left side of the screen to expand your options. Click Community library.

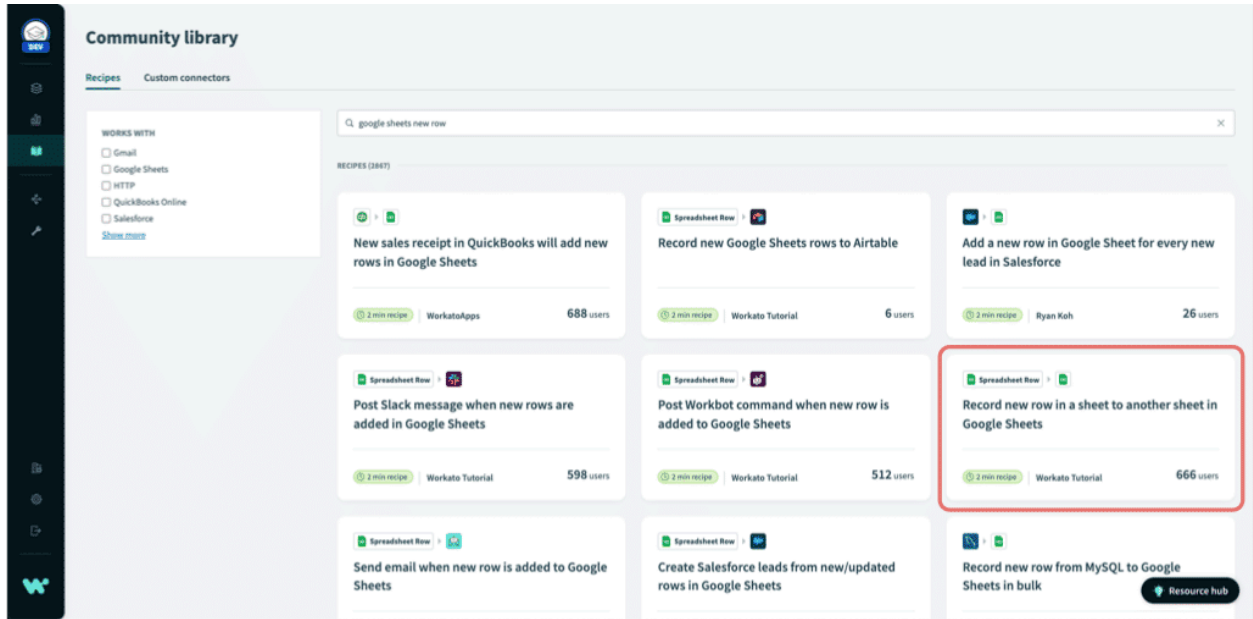


Search for a Workato community recipe

Ensure you are in the Recipes tab and type Google Sheets new row in the search bar.

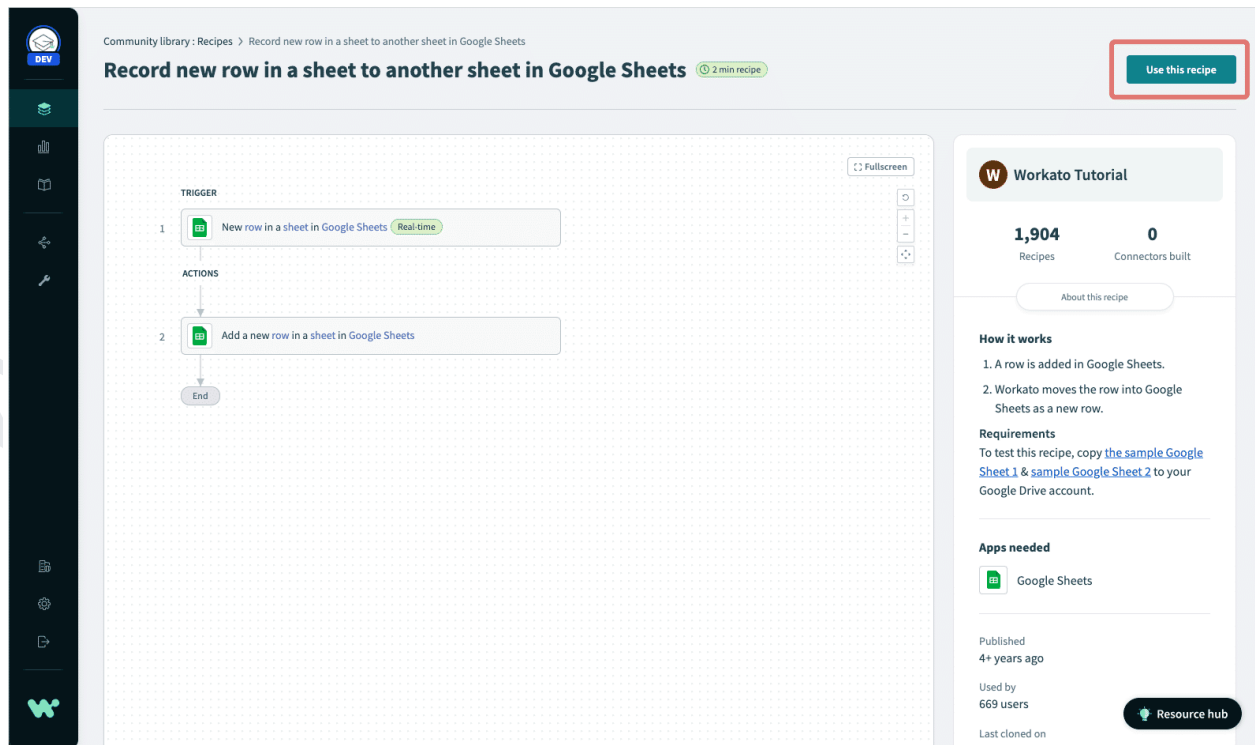


Locate and open the recipe titled Record new row in a sheet to another sheet in Google Sheets. This recipe is by Workato Tutorial.

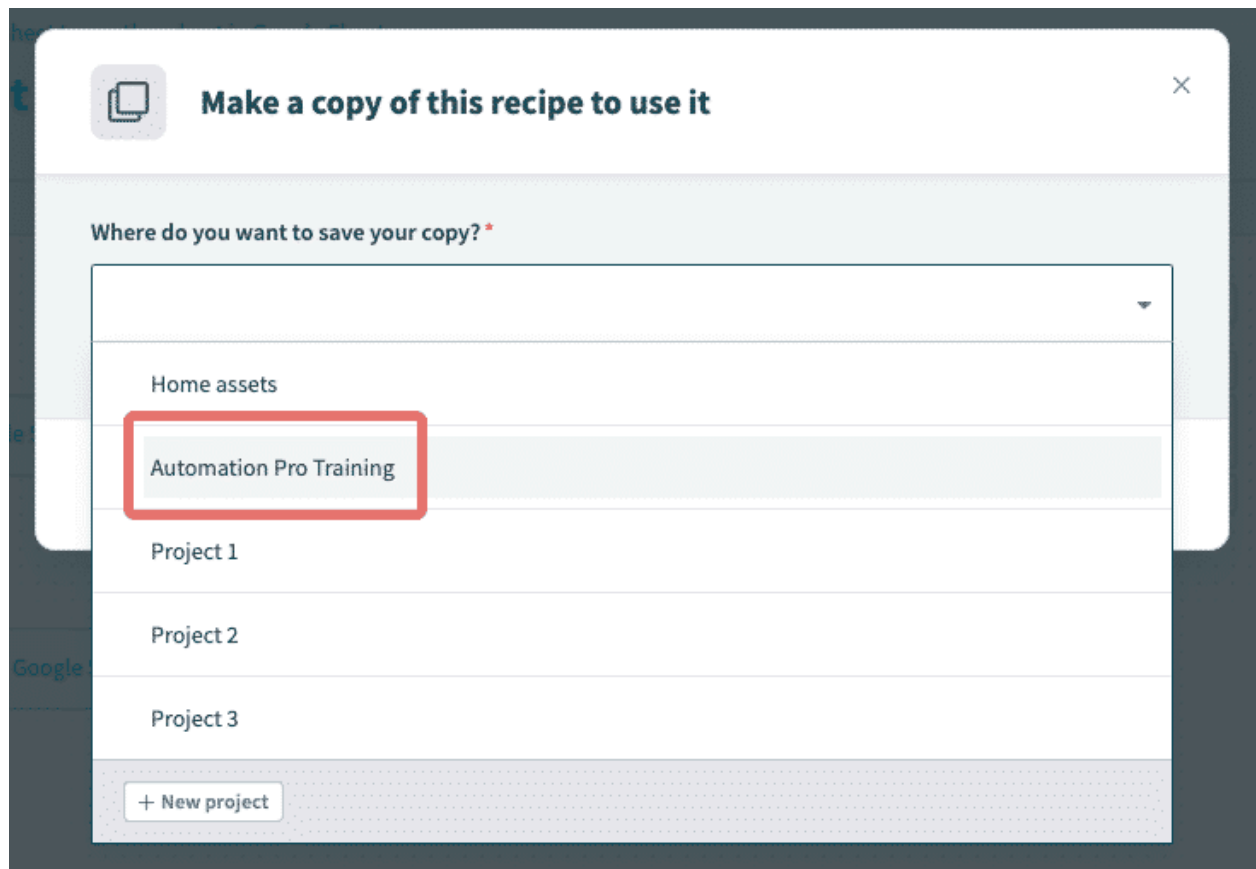


Clone the recipe you found

Click the **Use this recipe** button in the upper right corner.



Copy and save the recipe to your training folder.



Support channels

Before finishing the course, let's take a look at various support channels available to you. In these support channels, you can get help should you run

into issues at any point during your learning process or while you are building your automations.

Workato Documentation

You can access documentation directly at docs.workato.com

. You can navigate through documentation page trees or search for specific keywords.

Workato Success Center

At the [Workato Success Center](#)

, you can review tutorials, submit support tickets, or get help from the larger Workato community.

Content Library

Check out our content library of Workato resources at

www.workato.com/resources

. Here, you can download ebooks and reports, read solution briefs and use cases, or watch feature demos.

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