



Getting started with Workato

INTRODUCTION

Welcome to Workato!

You want to be more efficient. We want to support you on that journey.

Workato combines an enterprise-grade workflow automation platform with the ease of use expected from consumer apps, enabling biz users and IT to quickly build automation across cloud and on-premise apps.

Using Workato **Recipes**, you can create low-code or no-code workflows in minutes.

Refer to docs.workato.com for complete documentation.

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What is a recipe?

Recipes are the building blocks of any automation in Workato. They are automated workflows built by users that can span multiple applications.

A recipe is made up of one **Trigger**, one or more **Actions**, and **Connections**.

Trigger

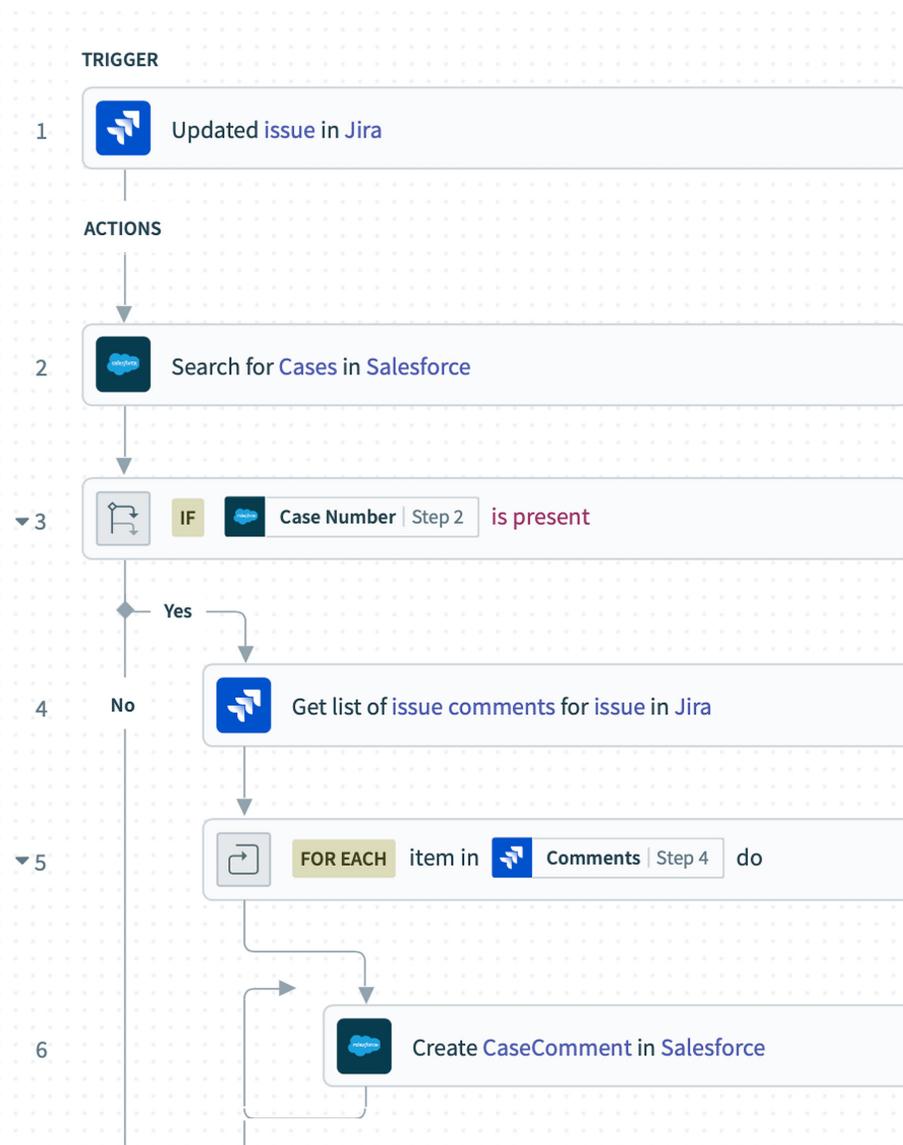
The trigger determines when your automation will be executed.

Actions

Your actions determine what work will be performed automatically. The kinds of actions you can take are dependent on your connections.

Connections

Connections are your integrated services involved with the automation. Workato offers over 1000 connectors to popular applications, such as Jira and Salesforce.



Triggers

Trigger capabilities depend on their connections but can be more broadly categorized by:

1. Trigger Mechanisms: when triggers check for new events
2. Dispatch Methods: how triggers group new events

TRIGGER

1



Select an app and trigger event

TRIGGER MECHANISMS



Polled: Periodically queries app to see if new events are available.



Real-time: Instantaneous when event occurs in app.



Scheduled: At regular intervals of time.

DISPATCH METHODS



Single: Useful for continuous real-time synchronization of data.



Batch: Used for increasing throughput, as trigger events are retrieved in lists.

Steps & Actions

After the initial trigger, recipe steps contain **Actions** or control flow statements that help you describe automation logic.

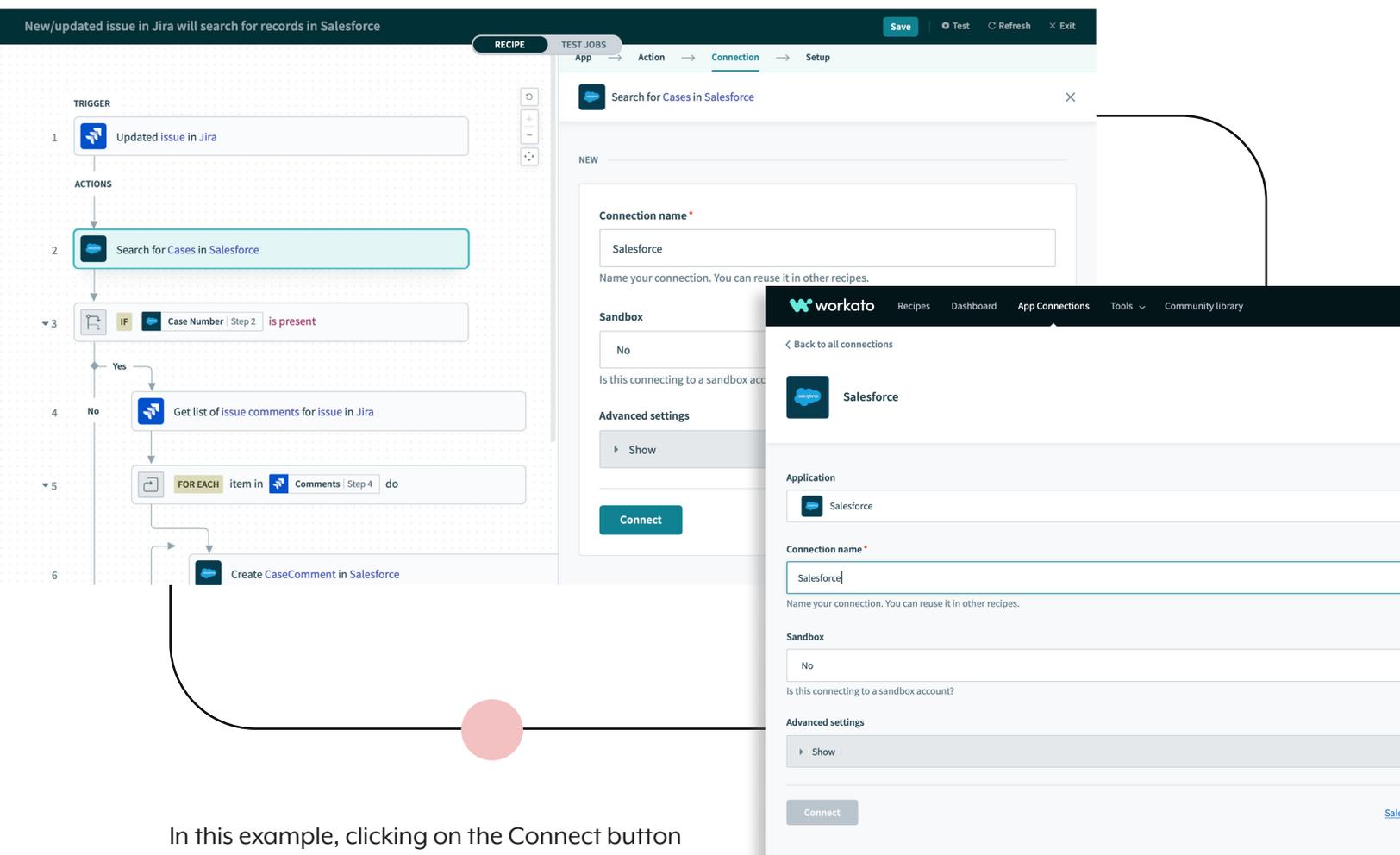


| | |
|---|---|
| <p>Action in an app: Carry out operations in your target app, like create, update or search.</p> | <p>IF condition: Commits action(s) if a condition you define is true. Otherwise, continues to next step.</p> |
| <p>IF/ELSE condition: Commits action(s) if a condition you define is true. Otherwise commits a step you define, then continues to the next step.</p> | |
| <p>Repeat action: Repeats action(s) for each item in a list. Ensures every item in the list is processed.</p> | <p>Call recipe: Runs a callable recipe. Can be thought of as function calls in programming language.</p> |
| <p>Stop job: Ends a single job from being processed further. Can be configured to mark the job as failed or successful.</p> | <p>Handle errors: Monitor for errors, retry a sequence of actions, and/or take remedial actions, like sending notifications.</p> |

Connections

A connection is created when a user authenticates with the app via Workato, and gives Workato permission to access the data. Workato offers connections to over 1000 apps and internal recipe tools and utilities, making it easy for you to automate integrations and workflows.

You can connect to apps, tools, and utilities when you create your recipes or through the App Connections menu option in the Workato platform.



The screenshot displays the Workato interface. On the left, a recipe flow is visible with the following steps:

- TRIGGER:** 1. Updated issue in Jira
- ACTIONS:**
 - 2. Search for Cases in Salesforce
 - 3. IF Case Number | Step 2 | is present
 - Yes: 4. Get list of issue comments for issue in Jira
 - No: 5. FOR EACH item in Comments | Step 4 | do
 - 6. Create CaseComment in Salesforce

On the right, a 'Connection' setup popup is open for the 'Search for Cases in Salesforce' action. The popup includes the following fields and options:

- Connection name:** A text input field containing 'Salesforce'.
- Sandbox:** A dropdown menu set to 'No'.
- Advanced settings:** A 'Show' button.
- Connect:** A blue button at the bottom.

A second, slightly overlapping popup is visible in the foreground, showing the same setup for the 'Salesforce' application, with the 'Connect' button highlighted.

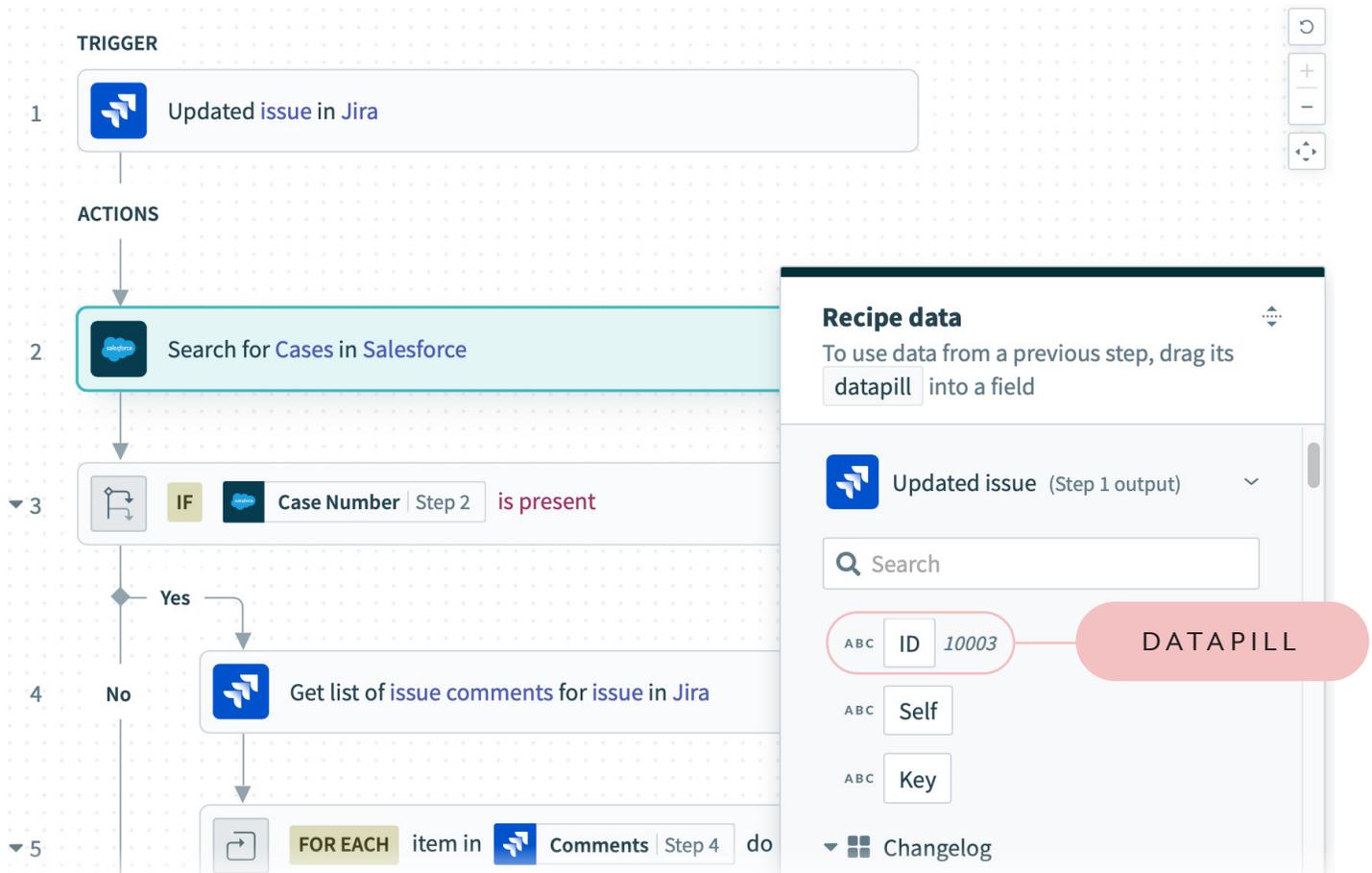
In this example, clicking on the Connect button generates a popup that requests for Salesforce login credentials. Refer to docs.workato.com for connection instructions.

Passing Data Between Systems

Every step, including triggers, brings data into the recipe. This data is made available in the recipe via **Recipe Data**.

Any connection included in your recipe can pass data between systems, like your Slack workspace and your Jira instance, using recipe data.

The recipe data box (pictured below) contains **Datapills**, variables of data provided from connections, that are used as vehicles to move data from one system to another in a process called **Field Mapping**.



Passing Data Between Systems

Field Mapping and Input Fields

Let's say you're creating a recipe that monitors Jira to see if comments are being added to Jira issues and automatically adds those comments to associated Salesforce cases. You also want to send a Slack message when comments are added.

The image displays a Workato recipe configuration. The main flowchart consists of the following steps:

- Step 4: Get list of issue comments for issue in Jira
- Step 5: FOR EACH item in Comments Step 4 do
- Step 6: Create CaseComment in Salesforce
- Step 7: Post message in Slack

A 'Recipe data' panel is shown, illustrating data mapping. A 'Key POT-4' is mapped to the 'Basic text' field of the 'Post message in Slack' action. The resulting Slack message content is:

JIRA Key Step 1 updated. Updated Salesforce case: <https://workato-9d-dev-ed.lightning.force.com/lightning/CaseID/Step2/view>

A 'DATA MAPPING' callout points to the 'Key POT-4' field in the recipe data panel.

Below the recipe configuration, a Slack message notification is shown from 'W. Orkato' at 12:46 PM, containing the text: 'JIRA POT-1 updated. Updated Salesforce case...' and 'JIRA POT-4 updated. Updated Salesforce case...'.

When designing the recipe, datapills for Jira's issue information are dragged to the **Input Field** of the action describing what text should be posted in Slack when the trigger event occurs.

This is just one example of how to map data through the use of recipe data and input fields. Recipes can contain dozens of data mappings utilizing many connections.

Data Types & Transformations

-  **Strings**
-   **Numbers**
-   **Dates**
-  **Lists**
-  **Boolean**

Each datapill has an associated **Data Type**. You can see each data type icon indicated next to datapills and input fields. When mapping datapills to input fields, it is important to match data types whenever possible.

But what if you're trying to pass data from one app to another and the same data is presented differently between the two?

For example, what if you're trying to record a date from one app that is expressed as "01/01/2021" and another app which only interprets the date as "Fri, 01 Jan 2021"?

This is where **Data Transformations** come into play. Data transformation is the process of changing or enriching data so fields from one app can be mapped to another. This is done using the **Formula Mode** option above input fields.

Name

Text
Formula

ABC

| DATA | FORMULA | OUTPUT |
|----------------------------|---|-------------------------------|
| Current time | <code>now</code> | "2021-01-01 T08:27:142-07:00" |
| Current time, transformed | <code>now.strftime("%B %e, %I:%M%p")</code> | "January 1, 08:27AM" |
| 15 days from now | <code>15.days.from_now("%B %e, %I:%M%p")</code> | "January 15, 08:27AM" |
| Day of the week, next year | <code>1.year.from_now("%A")</code> | "Saturday" |

Recipe Tools & Utilities

Not all recipes need to reference an external app via a connection. Workato supports many internal functions used as their own actions. Below is a short list of commonly used recipe tools and utilities you might find useful during your automation development.

| | | | | |
|---|---|---|---|---|
|  |  |  |  |  |
| Scheduler by Workato | CSV by Workato | Email by Workato | Files by Workato | Charts by Workato |
|  |  |  |  |  |
| JMS | JavaScript | JSON parser by Workato | JSON Web Token(JWT) | Linked objects by Workato |
|  |  |  |  |  |
| Logger by Workato | Lookup tables by Workato | PGP | SMS by Workato | SOAP tools by Workato |
|  |  |  |  |  |
| RecipeOps by Workato | Ruby | Lists by Workato | Mapper by Workato | PubSub by Workato |
|  |  |  |  |  |
| Callable recipes by Workato | Collection by Workato | Message template by Workato | Variables by Workato | People Task by Workato |
|  |  | | | |
| XML parser by Workato | YAML parser by Workato | | | |

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Learn the basics of automating your business.

Automation Pro II

More advanced and hands-on automation techniques.

Workbot for Slack

Make your first Workbot in Slack.

Using Callable Recipes

Use a common set of repeatable actions quickly, in any Workato recipe.

AUTOMATE THE W*RK OUT OF EVERYTHING

Workato Automation Institute

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