

Workato Automation Integration Developer

40 Hours

Course Description

The Workato Automation Integration Developer course is tailored for individuals aiming to become proficient in leveraging Workato for seamless automation and integration. This comprehensive program covers fundamental concepts, advanced techniques, and practical application of Workato to empower participants in automating diverse business processes.

Audience

This course is ideal for integration developers, IT professionals, system architects, and business analysts seeking to enhance their skills in automation and workflow integration using Workato. Basic familiarity with business processes and data management is recommended.

Pre-requisite Knowledge/Skills

No specific prerequisites. The course is suitable for both beginners and intermediate users.

Course Objectives

- Develop a foundational understanding of the principles and mindset driving modern automation.
- Navigate the Workato platform proficiently to enhance productivity in automation projects.
- Master the creation and execution of recipes, including establishing application connections.
- Explore advanced actions, conditional steps, and data transformations for intricate workflows.
- Efficiently work with lists, from mapping to utilizing list formulas for dynamic processes.
- Optimize task usage, implement strategies for efficiency, and grasp recipe lifecycle management.
- Implement batch and bulk processing strategies and seamlessly integrate databases.
- Understand the nuances of the HTTP connector and effectively manage collections.
- Identify, manage, and troubleshoot errors at various levels, applying industry best practices.
- Apply acquired knowledge to practical scenarios and real-world use cases.
- Achieve proficiency in designing, implementing, and optimizing automation recipes within Workato.

Course Outline

The course comprises 40 hours of theory and labs. It's divided into 18 different modules.

Module 1: Introduction to Workato

- The New Automation Mindset
- Workato at a Glance
- Workato Functionality
- The Workato UI
- Projects
- Lab Workbook
- Lab: Create a Project
- Key Takeaways
- Knowledge Check

Module 2: Recipe Components

- What is a Recipe?
- Application Connections
- Triggers
- Steps
- Lab Prep
- Lab: Create Your First Recipe
- Key Takeaways
- Knowledge Check

Module 3: Introduction to Recipe Design

- What is Recipe Design?
- Data Mapping with Data Pills
- Formulas
- Testing and Running Recipes
- Lab: Map and Modify Data
- Key Takeaways
- Knowledge Check

Module 4: Recipe Information

- Workato Dashboard
- Recipe Details and Versions
- Jobs and Job Reports
- Lab: Customize a Job Report
- Key Takeaways
- Knowledge Check

Module 5: Advanced Action Steps

- Steps Expanded

- Conditional Actions
- Lab Workbook
- Lab Prep
- Lab: Conditional Actions
- Repeat Action
- Lab: Repeat Action
- Error Monitoring & Handling
- Lab: Error Monitoring & Handling
- Knowledge Check

Module 6: Data Mapping & Modifications Expanded

- Introduction to Data Transformations
- String Formulas
- Number Formulas
- Date and Datetime Formulas
- Lab: Data Transformations
- Knowledge Check

Module 7: Lists

- Introduction to Lists in Workato
- Data Mapping with Lists
- Processing Lists in Recipes
- List Formulas
- Lists by Workato
- Lab: Lists
- Knowledge Check

Module 8: Introduction to Workato Tools and Built-in Apps

- Workato Tools and Built-in Apps Overview
- Lookup Tables
- Lab: Lookup Tables
- Variables by Workato
- Lab: Variables by Workato
- Knowledge Check

Module 9: Advance Action in Lists

- Data Mapping with Lists
- Processing Lists in Recipes
- List Formulas
- Lists by Workato
- Optional Course Survey
- Course Complete

Module 10: Introduction to Data Transformations

- Datatype Transformations

- String Formulas
- Number Formulas
- Date and Datetime Formulas
- List Formulas
- Advanced Transformations
- Ternary Conditions
- Other Common Formulas
- Common Scenarios

Module 11: Recipe Level Errors

- Recipe Design-Time Errors
- Trigger Errors
- Job Errors
- Common Errors and Error Codes
- Best Practices
- Recipe Logic Error
- Knowledge Check

Module 12: Task Optimization

- Understanding Tasks
- Key Factors of Task Usage
- Task Optimization Approach
- Task Optimization Strategies
- Monitoring and Tracking
- Knowledge Check

Module 13: Recipe Lifecycle Management for Environments

- Introduction to Recipe Lifecycle Management
- Environment Strategy and Teams
- Governance
- Teams
- Organizing Environments
- Recipe Lifecycle Stages and Governance Processes
- Recipe Environment Promotion Process
- Manifests and Packages
- Export a Package
- Import a Package
- Manage Updates
- Troubleshoot Common Issues
- Release Management Best Practices
- Measure and Improve
- CI/CD Automation

Module 14: Batch/Bulk Processing

- Understanding Batch/Bulk Processing

- Batch Processing
- Batch Triggers
- Batch Actions
- Bulk Processing
- Bulk Actions
- Hands-On Activity
- Batch Syncing from Salesforce to Google Sheets

Module 15: Working with Databases

- Fundamentals
- Welcome
- Overview
- Connection
- Triggers & Actions
- Triggers
- Performing CRUD Operations
- Hands-On Activity
- Use Case Guide
- Use Case Activity

Module 16: Applying Recipe Ops

- Functionalities
- Triggers
- Actions
- Hands-On Activity

Module 17: The Workato HTTP Connector

- Workato Connector Review
- HTTP Connector vs Other Workato Connectors
- HTTP Connector Pros & Cons
- HTTP Connector Solutions
- HTTP Connections
- Brief API Overview
- Lab Prep: ClickUp & Workato Setup
- HTTP Connector Wizard
- Lab: Connect to an API with the HTTP Connector
- HTTP Actions
- What is an HTTP Action?
- Lab: Create an HTTP Action
- HTTP Triggers
- HTTP Trigger
- What is an HTTP Trigger?
- Lab: Create an HTTP Trigger

Module 18: Collection by Workato

- Collections Overview
- Actions
- Creating
- Querying and Modifying Lists
- Joining and Sorting Lists
- Best Practices
- Common Mistakes